



## **VILLAGE OF KIMBERLY, WI**

### **NOTICE OF VILLAGE BOARD MEETING**

**DATE: Monday, February 5, 2024**  
**TIME: 6:00pm**  
**LOCATION: Village Hall, Rick J. Hermus Council**  
**Chambers 515 W. Kimberly Ave.**  
**Kimberly, WI 54136**

Notice is hereby given that a Village Board meeting will be held on Monday, February 5, 2024, at the Village Hall. This meeting is open to the public and the agenda is listed below.

- 1) Call to Order
- 2) Roll Call
- 3) Moment of Silent Reflection, Pledge of Allegiance
- 4) President's Remarks
- 5) Approval of Minutes from the 01/22/2024 meeting
- 6) Unfinished Business
  - a) None
- 7) New Business for Consideration and Approval
  - a) Village IT Managed Services
- 8) Reports
  - a) Chief of Police
  - b) Director of Public Works/Zoning Administrator
  - c) Community Enrichment Director
  - d) Library Director
  - e) Community Development Director
  - f) Administrator
  - g) Clerk-Treasurer
- 9) Public Participation
- 10) Adjournment

**Village Board VIRTUAL OPTION**

Feb 5, 2024 6:00 – 6:30 PM (America/Chicago)

**Please join my meeting from your computer, tablet or smartphone.**

<https://meet.goto.com/610095813>

**You can also dial in using your phone.**

Access Code: 610-095-813

United States (Toll Free): [1 866 899 4679](tel:18668994679)

United States: [+1 \(571\) 317-3116](tel:+15713173116)

**Get the app now and be ready when your first meeting starts:**

<https://meet.goto.com/install>

Any person wishing to attend the meeting, who because of disability is unable to attend, is requested to contact the ADA Coordinator at 920-788-7500 at least 48 hours prior to the meeting so that reasonable accommodations may be made.

**REGULAR MEETING OF THE KIMBERLY VILLAGE BOARD  
MINUTES  
JANUARY 22, 2024**

President Kuen called the meeting to order at 6:00 pm. Appearing in person were President Kuen, Trustees Trentlage, Karner, Hietpas, Hruzek, Hammen. Trustee Gaffney was absent and excused. Also present were Administrator/Community Development Director Mahoney, Clerk-Treasurer Weyenberg, Director of Public Works/Zoning Administrator Ulman, Brad Werner with McMahon & Associates and a member of the media.

**President's Remarks**

none

**Approval of Minutes from the 01-08-2024 Meeting**

Trustee Hammen moved, Trustee Karner seconded the motion to approve the Village Board minutes from 01-08-2024. The motion carried by unanimous vote of the board.

**Unfinished Business:**

**Sanitary Sewer Repairs**

Director Ulman stated that the village will work with Speedy Clean this winter to temporarily clean the area on Linda Street between Kimberly Avenue and 4<sup>th</sup> Street until there can be a permanent fix for this issue later in the spring. There was no action taken on this item.

**New Business:**

**Purchase 2024 John Deere 320-P Backhoe for \$149,000 from Brooks Tractor**

Trustee Trentlage moved, Trustee Hammen seconded the motion to purchase a 2024 John Deere 320-P Backhoe in the amount of \$149,000 from Brooks Tractor. The funds will be split 50/50 between the Street Equipment Trust Fund and the Storm Water Utility. The motion carried by roll call vote 6-0.

**Purchase John Deere Concrete Buster for Backhoe for \$12,700 from Brooks Tractor**

Trustee Hammen moved, Trustee Karner seconded the motion to purchase a John Deere Concrete Buster for the backhoe (approved earlier in meeting) in the amount of \$12,700 from Brooks Tractor. The funds will be split 50/50 between the Storm Water Utility and the Street Equipment Trust Fund. The motion carried by roll call vote 6-0.

**Site Plan Approval for Bob's Heating and Cooling, 123 S. Railroad St**

Trustee Trentlage moved, Trustee Hammen seconded the motion to approve the Site Plan for Bob's Heating and Cooling, 123 S. Railroad Street as recommended by the Plan Commission. The existing house will be razed for a 10-stall handicap accessible parking lot, a new 66'x30' garage will be constructed, and a traditional 8-ft tall chain link fence with privacy slots will be added. The motion carried by unanimous vote of the board.

**Site Plan Approval for Village of Kimberly Street/Parks Facility, 426 W. Kimberly Ave.**

Trustee Trentlage moved, Trustee Hammen seconded the motion to approve the Site Plan for Village of Kimberly Street/Parks Facility, 426 W. Kimberly Ave. as recommended by the

Plan Commission. The proposed use of the site will be same as the current operations. The motion carried by a 5-1 vote of the board with Trustee Hruzek opposed.

**Site Plan Approval for Blue at the Trails Town Homes & Single-Family Homes, Wilson St.**

Trustee Karner moved, Trustee Hammen seconded the motion to approve the Site Plan for Blue at the Trails as recommended by the Plan Commission. The development will include town homes each with 3 floors and also two-story homes with rear patios. The motion carried by unanimous vote of the board.

**Change Order #2 to Vinton Construction in the amount of \$42,405.02 for the 2023 Sunset Drive Reconstruction Project**

Trustee Trentlage moved, Trustee Karner seconded the motion to approve Change Order #2. The village will pursue Radtke Contracting for \$13,712.90 breakage on Rivers Edge Dr. The cost of this construction project is being funded by the Transportation Utility Fund, miscellaneous patching costs will be paid out of the TID 6 Fund. The motion carried by unanimous vote of the board.

**Receive Minutes of Boards and Commissions**

**Water Commission minutes of 11/14/23 and 12/12/23**

There was no discussion or action taken on this item, the minutes will be filed as presented.

**Plan Commission minutes of 10/3/23 and 12/19/23**

There was no discussion or action taken on this item, the minutes will be filed as presented.

**Public Participation**

None

**Adjournment**

Trustee Hammen moved, Trustee Karner seconded the motion to adjourn. The motion carried by unanimous vote at 6:12 pm.

---

Jennifer Weyenberg  
Clerk-Treasurer

Dated 01/31/2024

Drafted by ELZ

Approved by Village Board \_\_\_\_\_



# Memo

To: Village Board  
From: Maggie Mahoney, Administrator  
Date: February 5, 2024  
Re: Village IT Managed Services

---

## **EXPLANATION:**

The Village hires and outside vendor to provide IT services—this includes manages services as well as all IT specialized/project work. Managed Services includes network support, security and hardware/software maintenance.

A Request for Proposals (RFP) for IT Managed Services was sent to nine local providers. Four responded with proposals. A committee of five staff reviewed the proposals and evaluated them on the following criteria:

- Demonstrated understanding of the scope of work in the RFP
- Industry expertise and experience
- Demonstrated customer service quality and support
- Past record of performance and determined from all available information, including direct communication by the Village with vendor's current or former clients.
- The quality of the proposal and adherence to the proposal requirements.
- Financial considerations.

*Please see attached Village RFP for details on proposal requirements and details; copies of submitted proposals in alphabetical order; and, a summary of Financial Considerations.*

The proposals all met the requirements and were similar in most the of the criteria—financial considerations and record of past performance were the determining factors in selecting **Corporate Network Solutions, Inc. (CNSI)**. Specifically:

Recommendations were requested from all public/government organizations provided by each vendor. Each was asked for their honest feedback on responsiveness, customer service, professionalism/IT expertise, cost/pricing (have there been any surprises or issues). The volume and quality of recommendations received, as well as past direct experience of some of our current staff have had with CNSI, made them the preferred vendor for that criteria.

CNSI services do not require a contract. We are not paying a monthly retainer/minimum amount—they charge at the end of each month only for services/time used. In addition, they offer contract block hours that reduce the hourly rate the more you buy, and the block hours never expire. *It is estimated that our current IT budget can be reduced annually \$5,000-\$10,000 using the contract labor blocks.*

Staff will proceed with an onboarding of CNSI and offboarding with our current provider, which will require a 30-day notification period to terminate services. A Scope of Work will be drafted by CNSI. That document, as well as any agreements or contracts for labor blocks will be reviewed by Village legal counsel as necessary; however, we are not entering into a long-term contract or agreement – it is month-to-month.

**FUNDING:** The IT services described above are in the approved 2024 operations budget in the General Fund for \$36,000 (which includes software licensing).

**Attachments:**

- 1. Summary of Financial Considerations**
- 2. Village RFP**
- 3. Proposals in vendor alphabetical order**

## SUMMARY OF FINANCIAL CONSIDERATIONS

	AIT	Amplitel	Corporate Network Solutions	Marco
<b>Contract?</b>	No contract	12 months	No contract	36 months
<b>Monthly Cost</b> - 25 users/workstations	\$1619 for monthly fully managed services; Hourly billing rate (varies by service \$135-\$180); service bundle support labor rate of \$120 with Managed Service Plan	\$3100 for monthly services; project costs additional	Standard rate \$150/hour; 20 hour block \$140/hour; 50 hour block \$130/hour; 100 hour \$120/hour; blocks never expire ( <b>Estimate 150 block hours</b> )	\$2850 for monthly services; project costs additional
<b>Clarifications/Exceptions</b>	Does not include licensing	Includes Microsoft end-user, workstation and network products and licensing; project costs billed separate at additional cost	Does not include licensing	Does not include licensing; Microsoft licensing needs business premium/Entra ID p1 licensing and integration; backup pricing TBD based of data/number of servers
<b>Current Annual Licensing:</b> Microsoft Office (25 users), firewalls, email backup, anti-virus, multi-factor, server backup	\$11,000	included in monthly cost	\$11,000	\$11,000
<b>Onboarding cost</b>	15-30 min per PC/\$150 per hour=\$1500 est	\$0	1-2 hours=\$300; would comp if needed	\$3,320
<b>Estimated annual cost</b>	<b>\$ 30,428</b>	<b>\$ 37,200</b>	<b>\$ 29,500</b>	<b>\$ 45,200</b>
<b>Total 2024 Cost Est (budget \$36,000)</b>	<b>\$ 31,928</b>	<b>\$ 37,200</b>	<b>\$ 29,800</b>	<b>\$ 48,520</b>



## REQUEST FOR PROPOSAL

### IT Managed Services

Date of issue: December 13, 2023

Deadline: January 11, 2024



## **SUMMARY**

The Village of Kimberly is located east of Appleton in the Heart of the Valley and serves 7,600 residents. We outsource our IT services and are seeking a vendor with a proven track record of delivering IT managed services in a municipal environment. We are requesting proposals from qualified and experienced vendors to provide IT managed services for our organization.

For information on the Village please visit our website at <https://www.vokimberly.org/>

Interested vendors may contact Maggie Mahoney at [mmahoney@vokimberlywi.gov](mailto:mmahoney@vokimberlywi.gov) or (920) 788-7500 with questions or to request additional information.

## **Overview of Current Technical Environment**

The Village of Kimberly's current technical environment is as follows:

- Off-site vendor provides IT managed services.
- Four locations supported for staff, operations and the public:
  - Municipal Complex which houses the Central Office, Library, Board Chambers, Court office, and public meeting spaces. The Library is on a separate OWLS network.
  - Street and Parks Facility houses the Department of Public Works, Parks, and Recreation operations.\*
  - Fire Department/Senior Center
  - Sunset Beach (seasonal)

*\*In 2024 the existing Street and Parks Facility will be demolished and rebuilt. The new facility will be completed ~Spring 2026. Street & Parks Facility staff and operations are located at Municipal Complex and Senior Center during this time.*

- Approximately 25 staff workstations for regular and seasonal employees. ~35 active users annually. Smartphone integration for email and applications.
- Desktop operating systems is Windows.
- Specialized software includes access control, Civic Systems, Casselle, and Rec Desk.
- On premise servers.
- Products purchased by the Village through the vendor: Microsoft 365 licensing and backups, multifactor authentication, spam filtering, anti-virus, server backups, monitoring agent, auto-elevation, security awareness training, vendor portal, password management tool, email signature management tool, annual firewall licensing, and email backup.

## **Service Requirements**

The following services are the current priority items for the Village and each should be specifically addressed in the proposal, including how you would manage support for each area and how the cost is determined, 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 8:00am and 4:30pm CST/CDT, Monday through Friday, excluding all federally recognized holidays and observation days. Perform any disruptive maintenance and/or upgrades outside of the regular hours as stated.

### **Information Requirements and Format**

In order to simplify the proposal evaluation process, the Village is seeking RFP responses in the following format. Responses should completely and fully address each as listed.

- 1) Cover letter
  - a) Include the name, address and telephone number of your company.
  - b) Include the name and email address of the direct contact person for this proposal.
- 2) Company Overview
  - a) A brief description of the qualifications and experience of your firm. Include personnel qualifications and experience.
- 3) Relevant Experience
  - a) Your current and past experience as it relates to the scope of this request for proposal.
  - b) References of other Municipalities/Organizations for which your firm provides or has provided these services; or, work similar to that involved in this request for proposal.
  - c) Municipal government experience. Preference will be given to respondents who provide these services for municipal government.
- 4) Support
  - 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) Please provide a proposed work plan for a 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, for instance, different support proposal items may require a different rate application.
  - c) Do you offer service bundles? If so, describe the effect of bundling on pricing.

## **SUBMISSION**

A complete pdf of the proposal must be submitted by **4:00 p.m., Thursday, January 11, 2023** by email with the subject **"Village of Kimberly – IT Managed Services"** to [mmahoney@vokimberlywi.gov](mailto:mmahoney@vokimberlywi.gov).

If further information is required, contact Maggie Mahoney at 920-788-7500 or by email.

## **PROCESS**

The Village of Kimberly will conduct the review, screening and selection of a professional vendor to provide the services required. The vendor 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 Village.

## **EVALUATION CRITERIA**

Staff will evaluate the proposals. If there is no clear choice, a short list of vendors 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
- Demonstrated customer service quality and support
- Past record of performance as determined from all available information, including direct communication by the Village with vendor's current or former clients.
- The quality of the proposal and adherence to the proposal requirements
- Financial considerations
- The quality of the interviews, if necessary

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

December 13, 2023	-	RFP Issued
January 11, 2024	-	RFP Responses Due
January 12-25, 2024	-	Village Evaluation\Vendor Interview (if needed)
February 5, 2024	-	Village Board consideration

**CANCELLATION OF RFP:** 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.

*The Village of Kimberly reserves the right to accept or reject any or all proposals, to waive any irregularities, informalities or defects in any proposal, to accept any proposal in whole or in part which shall be deemed in the best interests of the Village of Kimberly, and to negotiate with the successful proponent. The Village assumes no responsibility for "late proposals". It is the sole responsibility of the vendor to ensure that the proposal is received at the Village by the deadline.*



**AIT Business Technologies, LLC**

**738 Ford Street**

Kimberly, WI 54136

Phone: (920) 730-0500

Fax: (920) 733-1864

[www.getait.com](http://www.getait.com)

[bschuh@getait.com](mailto:bschuh@getait.com)

To Whom it May Concern:

AIT Business Technologies is pleased to present the attached proposal for managed IT services for the Village of Kimberly. AIT is based in the Village of Kimberly and therefore have a vested interest in delivering top notch IT services within budget and on schedule. We employ a team of over 20 individuals, many with over 20 years of experience and some of which living within the Village.

All managed service customers like the Village are assigned a dedicated senior engineer to oversee all services like periodic log reviews, project management, and emergency support. In addition to a dedicated engineer, you will have access to our help desk personnel, ticketing system, asset management, and a team dedicated to your success with a 2-hour SLA for emergencies.

Questions regarding this proposal or future services can be directed to our Vice President of Sales and Customer Relations, Brian Schuh at [bschuh@getait.com](mailto:bschuh@getait.com) or directly on his mobile phone at 920-740-7286.

Respectfully Yours,

Brian Schuh  
Vice President of Sales and Customer Relations  
AIT Business Technologies, LLC



**AIT Business Technologies, LLC**

**738 Ford Street**

Kimberly, WI 54136

Phone: (920) 730-0500

Fax: (920) 733-1864

[www.getait.com](http://www.getait.com)

[bschuh@getait.com](mailto:bschuh@getait.com)

## **Company Overview**

AIT is a Kimberly based company celebrating our 25<sup>th</sup> year in the technology industry around the Fox Cities. We serve more than 20 other local government entities, many of which are very similar in scope to the Village needs. We have successfully completed previous projects for the Village on time and within budget.

We employ a team of over 20 individuals, many of which have over 25 years supporting local customers similar to the Village of Kimberly. We have an internal help desk team available Monday through Friday from 8:00am to 4:30pm. There is an experienced engineer available on call 24 hours a day, 365 days a year. We also have specialized team roles including security and compliance, telecom and accounting. We treat every organization like it were our own and make every suggestion accordingly.

### Key Staff Descriptions

#### **Owner – Aaron Schmitt**

Aaron founded AIT Business Technologies in 1998, as the sole technician. Fast forward almost 25 years, and even with our tremendous growth, I still take pride in getting to know our customer base and working alongside our talented staff in conceptualizing, engineering, and diagnosing projects and problems for our clients. My goal is to always be available and accessible for all of our clients to reach out to at any time.

#### **Vice President of Sales & Customer Relations – Brian Schuh**

Brian started working in IT in 1997 for local IT company and Kaukauna Area School District. Currently holds Associates Degree from Fox Valley Tech and numerous industry certifications from A+ to Azure and Project Management. Has been with AIT for almost 10 years and has worked on several projects with the Village of Kimberly already.

#### **Lead Engineer (Intended) – Sean Bradley**

Sean Bradley studied computer electronics at Moraine Park Technical College. He has been in the computer consulting / IT field for the past 30 years. He currently manages a number of municipalities for AIT. He enjoys building relationships with customers and achieving their IT goals. he resides in Menasha, WI with his wife Julie and four children Samantha, Rachel, Alex and Gavin. Sean is an avid golfer and outdoorsman.



**AIT Business Technologies, LLC**

738 Ford Street

Kimberly, WI 54136

Phone: (920) 730-0500

Fax: (920) 733-1864

[www.getait.com](http://www.getait.com)

[bschuh@getait.com](mailto:bschuh@getait.com)

## **Relevant Experience**

AIT is a Kimberly based company celebrating our 25<sup>th</sup> year in the technology industry around the Fox Cities. We employ a team of over 20 individuals, many of which have over 25 years supporting local customers similar to the Village of Kimberly. We serve more than 20 other local government entities, many of which are very similar in scope to the Village needs. We have worked with many of the software packages common among municipalities including Civic Systems, Caselle and Microsoft 365.

We have done numerous projects for the Village in the past and look forward to solidifying our partnership to the extent it makes sense for the Village. AIT is located in the Village of Kimberly, so we have a vested interest in making sure services are delivered within budget at a level consistent with a growing local government.

### **Comparable Townships Currently Supported**

Village of Greenville

City of Weyauwega

Town of Lawrence

### **Other Relevant Government Support**

Heart of the Valley Metropolitan Sewerage District

Village of Kimberly (Phones)

Darboy Joint Sanitary District

Village of Sherwood

Village of Stockbridge

Village of Winneconne (Phones)

Town of Clayton

Town of Omro (Phones)

Town of Dayton



**AIT Business Technologies, LLC**

738 Ford Street

Kimberly, WI 54136

Phone: (920) 730-0500

Fax: (920) 733-1864

[www.getait.com](http://www.getait.com)

[bschuh@getait.com](mailto:bschuh@getait.com)

**Relevant Municipal References Include:**

**Village of Greenville**

Travis Parish

[tparish@greenvillewi.gov](mailto:tparish@greenvillewi.gov)

**City of Weyauwega**

Becky Loehrke

[bloehrke@cityofweyauwega-wi.gov](mailto:bloehrke@cityofweyauwega-wi.gov)

**Town of Lawrence**

Cindy Kocken

[cindyk@lawrencewi.gov](mailto:cindyk@lawrencewi.gov)

**Heart of the Valley Metropolitan Sewerage District**

Kevin Skogman

[Kevin.Skogman@hvmsd.org](mailto:Kevin.Skogman@hvmsd.org)



**AIT Business Technologies, LLC**

738 Ford Street

Kimberly, WI 54136

Phone: (920) 730-0500

Fax: (920) 733-1864

[www.getait.com](http://www.getait.com)

[bschuh@getait.com](mailto:bschuh@getait.com)

## AIT Support Model

- A. AIT treats every organization like it were our own and do our best to work with each customer according to their needs. We have an internal help desk team available Monday through Friday from 8:00am to 4:30pm based in Kimberly, Wisconsin. Any request submitted via email or call is logged in to our internal ticketing system to assure follow-up and completion. There is also an experienced engineer available on call 24 hours a day, 365 days a year.

We offer support to customers on an as needed basis or a Managed Service model. Municipalities are required to be taking steps like managed services to assure security and compliance. AIT has helped the Village of Kimberly when needed for individual previous projects, but for full support we highly recommend managed services.

All managed service customers are bumped to the top of the priority list and guaranteed a 2-hour SLA for emergency support. Any request that is not immediately resolved by the help desk goes to your lead engineer for follow-up.

- B. AIT runs monthly compliance and security scans that would be available to staff and management for review. These show asset lists, patch management compliance, as well as numerous external security scan results.
- C. We utilize and offer a service for technical and end user training called KnowBe4. This service offers both technical training as well as end user behavior and social engineering training courses. These can be supplemented with email and even telephone and text behavior testing. Training and testing can be assigned by group and can get progressively more aggressive for user who fail testing.





**AIT Business Technologies, LLC**

738 Ford Street

Kimberly, WI 54136

Phone: (920) 730-0500

Fax: (920) 733-1864

[www.getait.com](http://www.getait.com)

[bschuh@getait.com](mailto:bschuh@getait.com)

## **Proposed Approach**

- A. AIT has migrated many customers into our environment and have a standard checklist we use to ensure a smooth transition. We have worked with many previous vendors including the current Village provider for a successful transition.

This process starts with a standard Password Transition form as well as a secure transmission of any available documentation directly from your previous vendor to our secure documentation vault. This is the point you are letting your old vendor know you are leaving.

Most transitions take place within 30 days of receiving documentation from your previous vendor. We will review all documentation and formulate a plan for transition of relevant services. We will work with your staff to pick a cutover day where we will remove your previous service agents and install ours. This will be coordinated with your original IT company to ensure a smooth transition while not leaving you unprotected. Most transition activities are planned, processed and completed by AIT staff. Staff will likely only be impacted for a few minutes on cutover day to remove any old agents and install new security software agent.



**AIT Business Technologies, LLC**

**738 Ford Street**

Kimberly, WI 54136

Phone: (920) 730-0500

Fax: (920) 733-1864

[www.getait.com](http://www.getait.com)

[bschuh@getait.com](mailto:bschuh@getait.com)

## **Financials**

- A. AIT's standard billing model is based on an hourly billing rate as well as monthly services according to each customer needs. All support and project work is tracked throughout the month in tickets and then billed at the end of each month.
  
- B. Our tier 1 support bills at \$135 per hour in 15-minute increments. This would include all help desk telephone support as well as junior technician on-site support. Senior engineer support is \$150 per hour and our after-hours emergency rate is \$180 per hour. On-site support requires a 1 hour minimum and travel is based on the time it takes to travel from our office to your location (minimal).
  
- C. AIT "Service Bundles" are simply a monthly budget as a base rate for each of those services. For example, in the attached proposal we break out the Managed Services based on each endpoint, KnowBe4 training per user, and then include a budget of monthly support labor. We do offer discounted support labor rate of \$120 per hour when bundled with a Managed Service Plan.



We are Pleased to Present the  
Following Proposal

**Managed Services - Village of Kimberly**

QUOTE #000776 V1

PREPARED FOR

**Village of Kimberly**

PREPARED BY

**Brian Schuh**



Wednesday, January 10, 2024

Village of Kimberly  
Maggie Mahoney  
515 W. Kimberly Ave.  
Kimberly, WI 54136  
[mmahoney@vokimberlywi.gov](mailto:mmahoney@vokimberlywi.gov)

Dear Maggie,

**Village of Kimberly**  
**Fully Managed Services Proposal**

**Introduction**

AIT is pleased to provide Village of Kimberly with this proposal for fully proactive managed services. AIT has helped hundreds of organizations with their IT needs, and choosing to move forward with a proactive approach allows us to provide the best possible service and reliability monitoring of your network.

Security and performance problems within your network can catch you off-guard at the worst possible time, which is why more organizations are seeking proactive measures to prevent such problems from occurring.

**Services Included**

AIT includes the following services and guarantees as part of your monthly rate.

**Standard Business Hour Support**

Our staff of technicians are at your disposal Monday through Friday, 8:00AM to 4:30PM. You can reach out to us for support either by e-mail at [service@appletontech.com](mailto:service@appletontech.com) or telephone at 920-730-0500. You can also contact one of our technicians directly via their cell phone or e-mail address, but for the best response time, we recommend all requests go through our main office.

**Guaranteed Response Time**

When requested, a technician will return your call or e-mail within 2 business hours.

**After-Hours & Weekend Call-Back Support**

An on-call technician will be available for call-back and remote support 24x7x365. If the on-call technician is unable to answer immediately, we guarantee a return phone call within 2 business hours.

**Remote Support Agent on All Workstations**

Powered by ConnectWise Automate, our remote monitoring and maintenance agent will be installed on all workstations in your environment. This agent gives us the monitoring capabilities and power to control your workstations for remote support, patch management, registry fixes, and more.



### **Daily On-Premise Backup System Monitoring of Windows-Based Servers**

The worst time to find out your backups are not running properly is after a failure or data loss has occurred. With us monitoring your backup cycles, you can be assured your backups will be available if you need them.

### **Server Capacity & Performance Monitoring**

If your company's server runs low on space (or runs out completely), this means a screeching halt of your operation. It can also lead to corrupt databases and other detrimental situations. There are also times that tasks can become hung-up, causing high CPU and/or disk loads, which will cause poor performance, and ultimately, lack of productivity. We monitor all of these items so we can take action when necessary.

### **Workstation Capacity & Performance Monitoring**

Running out of space or high CPU loads can also plague workstations, causing system instability, poor performance, or just general inconsistencies. Our agents also monitor for these conditions, allowing us to be notified and take action when necessary.

### **Network Monitoring with Automated Alerts**

Rogue traffic on your network can cause network bottlenecks, resulting in poor performance, disconnections, and other usability issues. Our monitoring tools can alert us of these conditions so we can locate the source of the problem quickly and efficiently.

### **Third-Party Software Patch Management**

There are multitudes of software packages that require updates to keep them secure and up-to-date. Our 3<sup>rd</sup>-party patch management handles updates such as Chrome, Adobe, Firefox and more... This allows you to keep operating business as usual.

### **Quarterly External Network Vulnerability Scan**

Hackers are constantly trying to find ways of invading your network. The internet provides an easy way for attackers to reach your systems. A secure firewall solution is important, but at times it becomes necessary for pinholes to be open in your firewall to allow access to certain services and devices from remote. As a managed services customer, we will perform an intrusion test on a quarterly basis to determine your risk factors, if any.

### **License & Asset Management**

It is important to know your inventory of hardware and software for many reasons, such as disaster planning, insurance, or general system upgrade cycles. We collect and organize this information, allowing us to call upon it easily when needed.

### **Quarterly Network Health Review**

Your network is the backbone of your company. All of the devices in your office depend on it to communicate with each other. Our quarterly review of your network devices allows us to identify any weak points and recommend any upgrades that might be necessary.



### **Scheduled Preventative Maintenance**

Simple maintenance of your equipment can go a long way towards the longevity of your server & networking equipment. We will make sure updates are completed and equipment is maintained to prevent unplanned outages and user issues. Scheduled restarts can be completed to avoid memory leaks, performance issues and apply critical updates. We can periodically review logs, clean out temporary files, and make sure even the smallest issues are caught before snowballing into something bigger that effects performance.

### **Automated Windows Update Patch Management**

Microsoft is constantly releasing updates for the Windows operating system, with the intention of patching security issues and improving reliability. Unfortunately, that is not always the result. In the past, certain Windows Updates have caused compatibility issues with customer software, halting their ability to operate. With patch management, we can deploy patches to certain machines in stages, allow us to perform testing before applying them to all machines on your network.

### **SentinelOne Managed Anti-Virus Software**

Threats such as ransomware, spyware, and Trojan horses threaten to infiltrate your network around the clock every day. New threats are created and distributed around the world every single day. It is absolutely paramount to have an anti-virus program that can not only track known viruses, but can also learn your network's normal activities, and slam on the brakes when something out of normal is detected. The SentinelOne platform delivers the defenses you need to prevent, detect, and neutralize known **and** unknown threats. This managed plan includes one license for each of your Windows-based devices.

### **Monthly Costs / Terms**

We have calculated the monthly cost for these services to be on per month basis, which is subject to Wisconsin Sales Tax (for taxable entities). Invoices shall be sent on the 1<sup>st</sup> of each month with Net 30 terms.

### **Length of Contract**

There is no contract required, and no minimum commitment with our managed services plan. 30 day notification of service termination required.

### **Best Effort Services**

AIT will make our best effort to provide the best monitoring and support based on the tools available and to the limitations of existing hardware. Not all hardware or software provides the same monitoring or automated update capabilities. AIT will utilize every available tool available and continuously improve our capabilities where feasible.

At AIT Business Technologies, our business is taking care of your business!

*Brian Schuh*

Brian Schuh  
VP of Sales & Customer Relations  
AIT Business Technologies



Fully Managed Services - Reoccurring

Description		Price	Qty	Ext. Price
Monthly-Managed Services	<b>Fully Managed Services</b>  Fully Proactive Managed Services Include: Standard Business Support Remote Support Agent on all Workstations On-Premise Backup System Monitoring (Daily) Server Capacity & Performance Monitoring Quarterly Network Health Review Scheduled Preventative Maintenance Windows Update Management Quarterly External Network Vulnerability Scan License & Asset Management Network Monitoring with Automated Alerts Third-Party Software Patch Management Workstation Capacity & Performance Monitoring	\$0.00	1	\$0.00
Base Charge	<b>Fully Managed Services - Base Charge</b>	\$250.00	1	\$250.00
Physical Servers	<b>Physical Server Rate</b>	\$50.00	1	\$50.00
Virtual Servers	<b>Virtual Server Rate</b>	\$45.00	1	\$45.00
Workstations	<b>Endpoint Workstation Rate</b>	\$25.00	25	\$625.00
Network Equipment	<b>Network Equipment Management</b>	\$100.00	1	\$100.00
Offsite Replication	<b>AIT Server Replication Service (2TB Max Data Tier)</b>	\$249.00	1	\$249.00
KnowBe4	<b>KnowBe4 User Training &amp; Testing Monthly License</b>	\$3.00	35	\$105.00
Labor-Fixed	<b>AIT Support labor</b>	\$120.00	1	\$120.00
DUO	<b>DUO MFA Security Licensing, Per User</b>	\$3.00	25	\$75.00
			Subtotal:	<b>\$1,619.00</b>



## Managed Services - Village of Kimberly



**Prepared by:**  
**AIT Business Technologies**  
Brian Schuh  
9207300500  
bschuh@appletontech.com

**Prepared for:**  
**Village of Kimberly**  
515 W. Kimberly Ave.  
Kimberly, WI 54136  
Maggie Mahoney  
(920) 788-7500  
mmahoney@vokimberlywi.gov

**Quote Information:**  
**Quote #: 000776**  
Version: 1  
Delivery Date: 01/10/2024  
Expiration Date: 01/21/2024

### Quote Summary

Description	Amount
Fully Managed Services - Reoccurring	\$1,619.00
Total:	<b>\$1,619.00</b>

Taxes, shipping, handling and other fees may apply. We reserve the right to cancel orders arising from pricing or other errors. Prices valid for 30 days from the date of this proposal.

### AIT Business Technologies

### Village of Kimberly

Signature: *Brian Schuh*  
Name: Brian Schuh  
Title: VP of Sales & Customer Relations  
Date: 01/10/2024

Signature: \_\_\_\_\_  
Name: Maggie Mahoney  
Date: \_\_\_\_\_





240 W Wisconsin Ave  
Kaukauna WI 54130

Nate Lahm  
(920) 759-4773  
[nlahm@ampliteltech.com](mailto:nlahm@ampliteltech.com)  
[www.ampliteltech.com](http://www.ampliteltech.com)



# Company Overview



# Our History

Amplitel Technologies was founded in 2007 with the vision to help small and medium-sized business gain return on their technology investments. Over the years we have dedicated ourselves to providing security focused quality work by using industry recognized products and retaining open and honest communication with our clients and partners.

In 2023 Amplitel also branched out with Amped Security Solutions as a DBA highlighting our service strengths in on-premise security and low voltage services.

This unique combination allows Amplitel overall to handle the complex projects that may require other competitors to bring in vendor support, more readily addressing the full IT needs of your business.

## Amplitel Technologies LLC



240 W Wisconsin Avenue  
Kaukauna WI 54130

# Who We Service

- Small to Medium Businesses
  - 10 to 150 employees in size
- Northeast Wisconsin
  - Several companies have other locations in other states
- Verticals
  - Manufacturing - 33%
  - Municipalities - 33%
    - Municipal Staff
    - Police Departments
    - Fire Departments
    - Public Works
  - Professional Services - 20%
  - Retail - 11%
  - Non-Profit - 3%



## **Amplitel Technologies**

- Managed IT Services
  - Budgeting and Long-Term Planning
  - License Management
  - Routine Maintenance and Patching
  - Cybersecurity
  - Help Desk
- Professional IT Consulting
  - Network Design and Segmentation
  - Server Refreshes and Migrations
  - Server migrations to cloud
  - Office 365 Architecture & Migrations
  - Firewall Design & Implementation

## **Amped Security by Amplitel**

- On-Premise Security
  - Security Systems
  - Video Surveillance
  - Access Control
- Commercial A/V Systems
  - Conference Rooms and Waiting Rooms
  - Phone and Paging Systems
  - Sound Masking
- IT Infrastructure Management
  - Wi-Fi Solutions
  - Data Centers
  - Cabling

**How We Put You At Ease**

## **Mission:**

- To build authentic trusted partnerships

## **Vision:**

- Be the company our competition envies



# The Leadership Team

## Aaron Lahm

Owner



After founding Amplitel in 2007 as a company of 1, Aaron's degree in Management Information Systems from UW Oshkosh gave him the drive to deliver stellar customer experiences and secure IT solutions. Over the last 16 years he has grown the business to 13 employees and counting!

## Nate Lahm

Relationship Manager



Not only a sales guy, Nate thrives on creating strong client partnerships and helping business grow into strong and secure IT solutions that meet their needs, creating plans for long term IT needs and solutions.

## Chris Glasheen

Amped Operations Manager



Leading our Amped security solutions, Chris comes through by ensuring clients have the best possible on-premise security solutions in place, from cameras and door access control to security systems and monitoring.

## Nicole Kobriger

Amplitel Operations Manager



Driving consistency and quality through processes and procedures, Nicole ensures that the Managed Services Team is always working hard to make certain our clients are well taken care of from Onboarding to Service Desk and beyond

# The Amped Team

## Scott

Systems Technician Lead

With more than 30 years of experience in the industry working on cabling, wi-fi, cameras, door access control, security and fire systems as well as conference rooms and paging systems.

Team Member since 2018

## Marty

Systems Technician II

With more than 12 years of experience in the industry working on cabling, wi-fi, cameras, door access control, security and fire systems as well as conference rooms and paging systems.

Team Member since 2011

## Casey

Systems Installer

As the newest member of the team, Casey is motivated, hard working and quickly proving his ability to learn and grow into a valuable member of the team.

Team Member since 2023

While our Managed IT Services Clients frequently work with our Service Desk Team, the Amped Team may assist in various projects being completed and bring significant skill and value to meeting your business needs.





# The Project Team

## Joe

IT Project Lead Engineer

With more than 25 years of experience in the industry, Joe graduated from NWTC and became a guru of all things servers and networking. Having managed complex projects over multiple sites his organization and attention to detail ensure for project success

Team Member since 2017

## Ryan

IT Project Engineer

With over 25 years of experience, Ryan knows his way around PC's like the back of his hand. As a graduate of DeVry University, Ryan leads the front for managing and installing and monitoring all managed services tool sets ensuring for the smoothest possible experience for our clients

Team Member since 2023

## Wyatt

Project Intern

Graduating from UW Madison in May of 24, Wyatt will be moving into a full time Project Coordination position with Amplitel. Having interned with us throughout his college career, he has proven to be detailed and organized professional capable of every challenge given to him

Team Member since 2021

## **Matt**

Tier 3 Service Desk Engineer

With more than 20 years of experience in the industry, Matt received his degree from WITC and leads the Service Desk Team ensuring strong ticket resolution and fast service for all our clients.

Team Member since 2018

## **Patrick**

Tier 2 Service Desk Technician

As our most recent addition, Patrick graduated from NWTC and has served several successful internships in IT. He approaches all challenges with positivity and drive to succeed.

Team Member since 2022

## **Ryan**

Tier 1 Service Desk Triage

Graduating from UW Green Bay, Ryan may be your first contact for support. After triaging your need, he often can resolve known issues quickly. Should higher level support be required, he'll lead the charge on ensuring it is scheduled to be taken care of.

Team Member since 2022

## **Jody**

Tier 1 Service Desk Triage

With 17 years of IT experience with various roles and graduating from NWTC, Jody brings a sharp eye to detail and as one of your first contacts in our Service Desk, he will work to ensure quick resolution or escalation to the next level of support for resolution.

Team Member since 2023

# The Service Desk Team



# Relevant Experience



# Local Government Clients

Vertical	Length of Relationship	User Count	Device Count	Server Count	Projects Completed
City including: Municipality Police Department Fire Department Public Works Library Pool	10+ Years Current Managed IT Services Client	125+	140+	20	<ul style="list-style-type: none"> <li>• Complete Server Rebuild</li> <li>• Design and Cable New City Hall</li> <li>• Citywide Camera System</li> <li>• Complete Network Redesign</li> <li>• Exchange Migration to M365</li> <li>• Migration to .gov</li> </ul>
Police Department	7+ Years Current Managed IT Services Client	35	40	17	<ul style="list-style-type: none"> <li>• Implemented CIS Controls to meet CJIS Requirements</li> <li>• New Firewall with Network Isolation and Segregation</li> <li>• New Phone System</li> <li>• Server Refresh</li> <li>• Networked Axon Body Cameras and Vehicle Cameras</li> </ul>
Village including: Municipality Fire Public Works Pool	9+ Years Current Managed IT Services Client	45+	60	14	<ul style="list-style-type: none"> <li>• Networking, Cabling, Cameras, Door Access control for new Public Works/Streets Building</li> <li>• Server Refresh</li> <li>• Expansion of Village wide fiber network</li> </ul>

*\*Client confidentiality is something we take seriously. For this reason, we are unable to disclose names and detailed specifics about the clients we are representing to ensure the highest security of their systems and tools.*

# Manufacturing Clients

Vertical	Length of Relationship	User Count	Device Count	Server Count	Projects Completed
Manufacturing and Distribution	10 Years Current Managed IT Services Client	40+	60+	12	<ul style="list-style-type: none"><li>• Implemented Citrix environment for remote access for nationwide locations</li><li>• Implemented phone systems to interconnect</li><li>• During company sale rebuilt entirely new server and network system in 30 days</li><li>• Worked with 3<sup>rd</sup> party vendor for parts list and pricing integration</li></ul>
Manufacturing	10 Years Current Managed IT Services Client	40+	60	7	<ul style="list-style-type: none"><li>• Cabled and then moved Network, Phones, Cameras and Access control from old building to new build location (needed to keep both locations up for an extended period)</li><li>• Helped expand network and servers for dramatic growth</li></ul>

*\*Client confidentiality is something we take seriously. For this reason, we are unable to disclose names and detailed specifics about the clients we are representing to ensure the highest security of their systems and tools.*

# References

The below references are clients we have spoken with and have agreed to be contacted as a reference on behalf of Amplitel Technologies. This contact information is confidential and should not be released or disseminated outside of the specific use for this one-time reference contact. We take the security and privacy of all our clients seriously and want to ensure that this remains intact.

## Reference 1

Applicant Firm Name: Village of Little Chute  
Contact Person: Lisa Remiker-DeWall  
Address: 108 W Main Street  
City/State/Zip Code: Little Chute WI 54140  
Telephone: (920) 423-3855  
Email Address: [lisa@littlechutewi.org](mailto:lisa@littlechutewi.org)

## Reference 2

Applicant Firm Name: City of Kaukauna  
Contact Person: Tim Taplin  
Address: 144 W 2<sup>nd</sup> St  
City/State/Zip Code: Kaukauna, WI 54130  
Telephone: (920) 766-[6300 Ext 1196](tel:9207666300)  
Email Address: [ttaplin@kaukauna.gov](mailto:ttaplin@kaukauna.gov)

## Reference 3

Applicant Firm Name: Rice Industries Management, Inc.  
Contact Person: Rick Milefchik  
Address: 1726 N Ballard Rd / Ste 1  
City/State/Zip Code: Appleton WI 54911  
Telephone: (309) 752-8348  
Email Address: [rick@aessupply.com](mailto:rick@aessupply.com)



**Support**

---

# Managed Services

Amplitel offers a robust Managed Services Package that covers all service requirements with a security focused menu of provided tools and services.





# Routine Maintenance & Monitoring

---

- We utilize a remote monitoring and management tool that allows us to monitor for key failures and automate software deployment, patching and remote access for support, including:
  - Workstation updates
  - Microsoft patches
  - 3<sup>rd</sup> party software patches
  - Server patching
  - Firewall patching
  - Camera/NVR patching
  - Switch patching
  - Wireless Access Point Patching
- Routine, non-critical, maintenance is scheduled at non-production impacting times to reduce impact to working hours
- Any critical patching will be verified for priority and communicated to be completed ASAP
- Access control System Management and Patching

# Vendor and Application Support

- We want to be the first contact on anything that touches your network, this helps you keep focused on your work while we ensure your network security and accessibility for any vendor
- Amplitel works with all application providers to support for all validly licensed applications
- Should you experience needs with any other Vendors like Internet, Phone or other service providers, we will ensure to support and take the lead when needed to ensure successful IT implementations are met



# Backups and Restores

- Amplitel can provide assessments for different levels of backup and recovery needs based on business needs
- Backups are full images, not just file level backups at regular frequencies to reduce any potential recovery loss
- Depending on need, we can provide multiple options for restores
- Amplitel provides backups for Microsoft 365 (e-mail, one drive and teams) to meet open records compliance requirements

# Incident and Service Desk Support

**We have workflows and procedures specific to Triaging tickets and managing tickets through to completion in a timely manner to meet established internal service level goals. Tickets processing goes through the following stages:**

- Ticket submitted by End-User via Amplitel Porta, e-mail or phone call.
- Ticket Triage within the first 30 minutes of being received and the following items assessed:
  - Ticket Impact and Priority Level
  - Proper Contact information
  - Appropriate level Service Desk Engineer
  - Timeline requirements
- After Triage is completed, the end-user receives communication either by phone if additional information is needed to support the request or issue at hand, or by e-mail if no other information is required. This will detail the scheduled timeline for completion of the ticket and assigned tech, as well as confirm priority level we have placed the ticket at.
  - Ticket is scheduled either by:
    - Phone call as part of the triage process
    - E-mail with a scheduling link
    - Some tickets don't need to be scheduled, we can just work them and provide updates along the way through e-mail or the Amplitel portal.
- The ticket is worked at the scheduled time and contact is made with the end-user regarding next steps to resolution. Once our Service Desk Engineer has completed the ticket, they notify the end-user.
- Test for resolution success is completed.
- Tickets are closed and final completion notice is e-mailed to the end-user.
- End-user receives e-mail survey for satisfaction confirmation.

# Swift Service with a Smile

End-User Submits Ticket via e-mail, call or Amplitel Portal

Ticket Triaged For Key Information: Urgency/Impact, Correct Contact Info, Engineer Level Required

Ticket Scheduled via phone call or scheduling link and Scheduling communicated to End-User

Ticket Worked and Resolution Tested with End-User

Closure Notification sent to End-User and Satisfaction E-mail Initiated

# Service Desk Location and Onsite Visits

- All Service Desk staff are located at Amplitel's office:

240 W Wisconsin Ave  
Kaukauna WI 54130

- With our Service Desk triage process, we review each ticket and work to resolve remotely. Should we identify that we need to come onsite to review in greater detail, we will send a technician or project engineer to assist

# Emergency Tickets and Escalation

## Emergency

- We provide Managed Services support through the Service Desk from 8 AM to 4:30 PM Monday through Friday excluding observed holidays.
- If you encounter an emergency during our office hours, the fastest way to get support is to call in to the service desk. Triage will escalate this ticket immediately to the team for priority support.
- Outside of these hours when you call we have an emergency voicemail, that will notify our team, allowing us to respond to clients efficiently outside of normal operating hours to provide support as needed.

## Escalation

- Triage of new tickets determines impact and urgency of each individual ticket, providing an escalation path for the ticket
- Based on these measures the ticket follows internal escalation processes
- If you feel that a ticket is not escalated to your satisfaction, reach out to your Client Success Advocate

- 
- Amplitel provides security awareness training encompassing both monthly quick hit trainings specific to each individuals needs, as well as e-mail phishing testing to drive heightened e-mail security awareness
  - Documentation for end user use of any Amplitel tools are provided
  - Other training and demos can be done based on request and clients needs
  - Amplitel provides a portal that provides a limited knowledge base for end users

## End User Training



# Project Planning and Budgeting



- We meet with all Managed IT services clients monthly to touch base on any questions or concerns and needs they may have.
- Annually we complete a full budgetary review to detail any aging equipment that may need addressing, or projects requested to provide additional service needs to meet the needs of your business.
  - Our budgetary reviews will focus on a five-year outlook to ensure that there are no surprises in the future IT needs costs that may be required.

# Perfecting Projects with Process

By following a defined procedure for Projects from the initial request to their final completion, we are able ensure our projects meet financial goals and deadlines. Ensuring critical members of the project team are involved in assessing and designing solutions for our client needs allows us to take a more comprehensive approach to the quoting process and ensures a clear statement of work and proper product and labor are in place to put all our clients at ease.

Requested Project Needs Reviewed

Signed Quotes Converted to Projects

Project Team Reviews and Communicates with Client for Scheduling

Project Completed and Monitored for Issues

Project Closed and Final Invoicing Sent

Project Quoted and Presented

Downpayment Invoicing Sent

Regular updates throughout Project Completion as needed

Process and Procedures Documents Updated As Needed

# Amplitel

---

Tools for Success





## ABOUT US

Founded in 2007, Amplitel services small and medium-sized business's IT and Low Voltage needs. We dedicate ourselves to providing security focused quality work using industry recognized products and retaining open and honest communication with our clients.

This unique combination allows Amplitel overall to handle the complex projects that may require other competitors to bring in vendor support and more readily address the full IT needs of your business.

## CONTACT US

240 W Wisconsin Ave  
Kaukauna, WI 54130  
(920) 759-4773  
info@ampliteltech.com  
www.ampliteltech.com

## MANAGED SERVICES

Tools For Success

[www.ampliteltech.com](http://www.ampliteltech.com)



## END-USER SECURITY

- Multifactor Authentication with Conditional Access
- E-mail Spam Filtering
- Microsoft Business Premium with M365 Backups and Tenant Management
- Security Awareness Training
- Password Management Tools

Amplitel's multi-faceted approach to End-User Security allows us to protect multiple vulnerability points in Microsoft Suite. By using Multifactor Authentication and Conditional access we can better barricade against potential malicious attacks. Not only focusing on attacks through e-mail spam and impersonation of C-level staff, but also on Security Awareness Training, we are able to help users stay on guard for targeted attacks



## DEVICE SECURITY

- Anti-Virus with End Point Detection and Response
- Zero Trust Tools Installation
- Security Awareness Training
- Remote Management and Monitoring
- Monthly Maintenance and Patching

Client device management is an important part of strong security. Our complex system defends against attacks from viruses, auto-installation attempts and keeps operating systems and common 3<sup>rd</sup> party applications up to date with the latest security patches. Offering Security Awareness Training on detachable drives and safe use of wi-fi reduces end-user vulnerabilities.



## NETWORK SECURITY

- Firewall Management and Patching
- Anti-Virus with End Point Detection and Response
- Switch and VLAN Management
- Remote Management and Monitoring
- Monthly Server Maintenance and Patching
- Server File and Image Backups

By using Next-Gen Firewalls with Unified Threat Detection to help protect against intrusion, malicious websites, and unfriendly countries. Coupled with Anti-Virus, VLAN standardization, Patching and Backups we align with NIST security standards and CIS controls





## ADDITIONAL INCLUDED TOOLS

- Amplitel Service Ticket Portal
- Exclaimer E-mail Signature Management
- Password Management Tool
- Billing Portal with ACH and Automatic Payment

## ADDITIONAL INCLUDED SERVICES

- Annual Budget Planning Meetings
- Regular Service Touch bases
- Help Desk 8 AM – 4:30 PM M-F
- Vendor Management
- Procurement Management
- Asset Management
- Project Management

## MANAGED SERVICES

Tools For Success

[www.ampliteltech.com](http://www.ampliteltech.com)



**AMPLITEL**  
TECHNOLOGIES

# MANAGED IT SERVICES PROPOSAL

## OVERVIEW

Amplitel is pleased to offer this Managed IT Services Proposal for the Village of Kimberly for review. The solutions detailed in this proposal have been created with the Village of Kimberly's needs in mind, and we are confident you will find that it offers value and increased cyber security for your organization.

## CURRENT STATE OF IT SERVICES

Below is a brief overview of Amplitel's review of the Village of Kimberly's existing infrastructure for this proposal:

- 25 Total users
- 26 workstations between all Village services and MCO
- 5 Virtual Servers with Datto Backup Solution
- 3 Switches
- 3 Firewalls
- 11 Access Points
- 10 Camera with 1 NVR
- 7 Access Control including panic system

## OUR PROPOSAL

Onboard into Amplitel's Managed IT Services solution which includes the following:

- Included Products and Licenses
  - Microsoft 365 Licensing
  - Microsoft 365 Backups
  - Multifactor Authentication
  - Anti-virus with Endpoint Detection and Response
  - Spam Filtering
  - Server Backups
  - Monitoring Agent
  - Admin Auto-Elevation
  - Security Awareness Training
  - Amplitel Portal
  - Password Management Tool
  - E-mail signature management tool
  - Firewall Licensing
- Included Services
  - Incident Management/Help Desk
  - Employee Profile Moves, Adds and Changes
  - Office 365 Tenant Management
  - Remote Microsoft Patch Management

- Remote Workstation Support and Maintenance for supported devices
- Remote Network and Infrastructure Support and Maintenance for supported devices
- Remote Server Support and Maintenance for supported devices
- Remote Server Backups and Restores
- Remote Firewall Management and Support
- Camera System Management and Support
- Remote Access Control Management and Support
- Remote Printer support for mapping related needs
- Asset Management for key network equipment and workstations
- Assistance in working with vendors impacting IT related projects or services.
- Strategic Meetings/Onsite Support as needed at the discretion of Amplitel.
- Work with client to compose annual budget needs including projects.

### **Onboarding**

- Our Onboarding Project is included at no cost to the Village of Kimberly
- As the Village of Kimberly is already an existing client no additional information requirements are needed
- Implementation of Amplitel's stack of tools and security structuring would be completed over the course of 30 – 90 days.
- Regular meetings during onboarding take place between key stakeholders at Village of Kimberly and Amplitel to ensure smooth transition to additional tools



## PRICING

Amptel's comprehensive pricing model includes all costs for Microsoft End-user licensing, workstation and network infrastructure management and their subsequent included products and licensing. The cost of these services is then calculated against average monthly support hours required to maintain the and support help desk services for the environment and it's included supported workstations and network devices. Pricing structure is reviewed annually based on Contract Agreements during the annual budget needs review discussion.

Service	Monthly Reoccurring / One Time Cost	Cost	Written Cost
Managed IT Services	Monthly Reoccurring	\$3,100.00	Three thousand, one hundred dollars
Onboarding project	One Time Cost	\$0.00	At no cost to the Village of Kimberly
<b>Total Monthly Reoccurring Costs</b>		<b>\$3,100.00</b>	<b>Three thousand, one hundred dollars</b>

### 5 Year Budget Recommendation

	2024		2025		2026		2027		2028	
	Budget	Comment	Budget	Comment	Budget	Comment	Budget	Comment	Budget	Comment
<b>Workstations</b>	\$15,000	Refresh 6-7 for Windows 11 Compatibility	\$15,000	Refresh 6-7 for Windows 11 Compatibility	\$12,500	Refresh 5-6 for aging devices	\$12,500	Refresh 5-6 for aging devices	\$12,500	Refresh 5-6 for aging devices
<b>Servers</b>			\$17,000	Refresh Host						
<b>Server Backups</b>	\$5,000	Move to Veeam Backups								
<b>Compliance</b>	\$5,000	Retire 192.168.0.0 IP Scheme; Server and Security VLANs for CIS Compliance	\$5,000	Implementation of CIS Controls	\$5,000	Implementation of CIS Controls	\$5,000	Implementation of CIS Controls	\$5,000	Implementation of CIS Controls
<b>Phone Systems</b>	\$10,000	Converting to Teams Phones								
<b>Camera</b>	\$6,000	VR/Server								
<b>Firewalls</b>			\$0	Replace firewall with leased firewall						

## CONCLUSION

We look forward to continuing work with the Village of Kimberly and supporting efforts to improve cyber security by driving solutions to help meet CIS compliance and putting into place tools to assist with creating and maintaining stronger security methodologies. We are confident that we can meet the challenges ahead and stand ready to partner with you in delivering an effective Managed IT Services solution.

If you have questions on this proposal, feel free to contact Nate Lahm at (920) 759-4773. We are excited to hear from you soon to continue building our relationship and to discuss further how we can serve the Village of Kimberly.

Thank you for your consideration,

Nate Lahm  
Relationship Manager



Village of Kimberly 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 an RFP to be the Village of Kimberly's preferred partner for the outsourced information technology hardware and software support.

Corporate Network Solutions, Inc.

1624 E Wisconsin Ave.

Appleton, WI 54911

(920) 832-8406 x202

[www.cnsiwi.com](http://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) 832-8406 x202 or email me directly at [todd.schroeder@cnsiwi.com](mailto:todd.schroeder@cnsiwi.com).

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

- Workstation devices, 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 Village of Kimberly.

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](mailto:Todd.Schroeder@cnsiwi.com)

[www.cnsiwi.com](http://www.cnsiwi.com)



## **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
- Network Engineers – Alex Welch, Justin Biese, Erich LeClair
- Hardware Technician – Xander Biese and David Lamma

CNSI employs seven (7) full-time and one part-time employee ranging from Senior Network Engineers, Network Engineers, Hardware Technicians, 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+. 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 who provides support for the network, file server, security, firewall, LAN, WiFi, Barracuda, etc. He has been with CNSI since 5/1/2007.

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.

Erich LeClair – Network Engineer/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.

David Lamma – Hardware technician and Barracuda backup specialist. Also works with all hardware and software related issues. He has been with CNSI since 12/22/2023.

Xander Biese – Part time Hardware Technician. He works when needed which is a couple of hours each week and more when necessary.

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

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

Please see the following current references:

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

Village of Harrison  
Matt Heiser – Village Administrator  
Phone: (920) 989-1062  
Email: [mheiser@harrison-wi.org](mailto:mheiser@harrison-wi.org)

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

City of Berlin  
Sara Rutkowski - City Administrator  
Phone: (920) 361-5400  
Email: [srutkowski@cityofberlin.wi.gov](mailto:srutkowski@cityofberlin.wi.gov)

Village of Hortonville  
Nathan Treadwell – Village Administrator  
Phone: (920) 779-6011  
Email: [village.administrator@hortonville.wi.gov](mailto:village.administrator@hortonville.wi.gov)



## RFP 2023 Village of Kimberly – Project

### Service Requirements

The following services are the current priority items for the Village.

- 1.) Managed Services including installation, maintenance, and incident support for on-site and remote supported workstations. We don't offer a one size fits all approach. We evaluate each environment and build a custom fit Managed Services Platform consisting of network protection/monitoring, system backup, MS 365 backups, MFA, spam filtering, managed antivirus, security awareness training, annual subscription reviews and renewals, etc. This approach almost always comes in @ 50% less than a "canned" MSP package from other vendors.
- 2.) Network service application support. Please contact our helpdesk to have a service ticket assigned and created for application support of all types.
- 3.) Management of software installation and licensing. We keep track of all software licenses and subscriptions. We will prompt you when it's time for renewals, additions, etc.
- 4.) Server backups and restores. We monitor all daily/complete backups for the file server, workstations, and MS 365 cloud email boxes.
- 5.) Firewall management and support. We fully support any network security appliance, apply security patches, upgrade firmware, and will notify you when the subscriptions need to be renewed.
- 6.) Printer support for mapping needs. We support all printer types including inkjet, LaserJet, All-in-One, large format, etc. We provide quotes for consumables such as toner and ink.
- 7.) Consult with management and assistance in working with vendors impacting IT related projects or services. We offer no charge consulting services at the request of the client.
- 8.) Strategic meetings/on-site support as needed. We recommend meeting at least once a year to go over the existing environment and budget planning for the upcoming year.
- 9.) Support disaster recovery for servers, workstations, server data and user data. Depending on the backup solution and the client requirements we can offer test data restores throughout the year. We actively monitor the daily backups to verify they are working correctly.
- 10.) Provide service between the hours of 8:00am and 4:30pm CST/CDT, Monday through Friday, excluding all federally recognized holidays and observation days. Perform any disruptive maintenance and/or upgrades outside of the regular hours as stated. Our normal office hours are 8:00am-5:00pm Monday-Friday. We also offer after hours emergency support 24x7x365. If support is required, please dial the normal office number and enter x300 which is our emergency on call support extension. The call will normally be returned within 30 minutes.

## Relevant Experience

- A.) CNSI has been in business since September 28, 1998, and over that time we have worked with over 50+ state and local government accounts. As of 12/19/2023 our current account lists over 25 active local county, city, village, and town clients.
- B.) I have included a separate document which includes the names and contact information to use at your discretion along with five (5) specific references who have given me the approval for you to contact them if necessary.
- C.) As you can see, we have extensive experience working with local government accounts, which gives us a unique advantage over our competitors.

**Support** - We pride ourselves in a personal approach to outsourced IT support and invest ourselves into the client's culture. Please see the following responses that follow along with your requests on the RFP.

- A.) **Technical Support Options** - We offer Time/Material, Blocks of Contract Labor Support, or a Hybrid Combination of both options. We recommend that the clients email any support requests to [helpdesk@cnsiwi.com](mailto:helpdesk@cnsiwi.com) which will automatically create and assign a service ticket using our OS Ticket Software. You are also invited to contact the office directly between the hours of 8:00am to 5:00pm Monday through Friday. Our phone is always staffed during those office hours. We also offer after-hour emergency support by calling the main office number and using x300. This option allows the end user to leave a voicemail and our system uses our phone tree to call the after-hours tech who will respond within 30 minutes. Our office is located @ 1624 E Wisconsin Ave in Appleton which is less than a 5-minute commute to your office.
- B.) **Documentation/Support** - Our first order of business upon being awarded the RFP would be to conduct a NO CHARGE network audit to fully document your network environment. We would then create a network diagram and document any other information that will help create efficiencies for future support of the environment. We will provide you with a copy of the report to keep onsite for your records and we will keep a copy for reference.
- C.) **Training Opportunities** – We offer basic training for mainstream and customized training for proprietary software. With our extensive experience in working with local government accounts and software we have been exposed to almost every known software in use. If we do not have the experience, we will work with the vendor to facilitate necessary training and documentation.

## Proposed Approach

- A.) CNSI onboards new clients from other vendors on a regular basis. We have a system setup where we work with the previous vendor to get all the necessary credentials transferred to our accounts. We create a Scope of Work (SoW) document that we will go over with you that covers the entire process including timelines and steps that we will complete.

## Financials

- A.) As stated earlier, we offer three types of billing options. Time/Materials, Contract Block of Support Hours, or Hybrid Combination of the two. I've attached a document that lists and explains our hourly rate and also lists the options for contract labor blocks of time.
- B.) We do not charge a monthly retainer. You are only invoiced for work completed either via hourly rate or time taken off of the block of contract labor. We do not have separate rates for hardware, software, security, wide area network, etc. All of our work is billed at the advertised rate of \$150 per hour or taken off of the block of contract labor.
- C.) We do offer Blocks of Contract Labor and I've attached a copy of the contract for your review. As you can see the hourly rates decrease as the block of time increases. The blocks of time NEVER expire.



## State/Local Government Accounts

- ◆ **City of Berlin, Police Dept., WWTP – *Berlin, WI***
- ◆ **City of Seymour, Police Dept., 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 Freedom – *Freedom, WI***
- ◆ **Town of Hartland – *Bonduel, WI***
- ◆ **Town of Maine – *Shiocton, WI***
- ◆ **Town of Nichols – *Nichols, WI***
- ◆ **Town of Osborn – *Seymour, WI***
- ◆ **Village of Black Creek, Police Dept., WWTP – *Black Creek, WI***
- ◆ **Village of Bonduel – *Bonduel, WI***
- ◆ **Village of Combined Locks – *Combined Locks, WI***
- ◆ **Village of Harrison – *Menasha, WI***
- ◆ **Village of Hortonville, Police Dept., Water Dept. – *Hortonville, WI***
- ◆ **Village of Nichols – *Nichols, WI***
- ◆ **Village of Wrightstown – *Wrightstown, WI***
- ◆ **Waupaca County – *Waupaca, WI***
- ◆ **Waupaca County Sheriff's Office – *Waupaca, WI***





**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:

<b>Standard Rate</b>	<b>\$150.00 per hour</b>
<b>20 Hour Block</b>	<b>\$140.00 per hour</b>
<b>50 Hour Block</b>	<b>\$130.00 per hour</b>
<b>100 Hour Block</b>	<b>\$120.00 per hour</b>

**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 time 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 (\$140.00 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.

Date of Acceptance: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Contact Name(s): \_\_\_\_\_

Authorized Signature: \_\_\_\_\_ Title: \_\_\_\_\_

CNSI Authorized Signature: \_\_\_\_\_ Date: \_\_\_\_\_

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

After signing, please make a copy for your records and email back to [helpdesk@cnsiwi.com](mailto:helpdesk@cnsiwi.com).

Thank You and we appreciate your continued business.



**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 customer's 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, Mitel, 3CX, Barracuda Networks, VMware, Buffalo Technology, Acer America, 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. support team consists of four 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 time on Sundays and holidays.

Standard Rate	\$150.00 per hour
20 Hour Block	\$140.00 per hour
50 Hour Block	\$130.00 per hour
100 Hour Block	\$120.00 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](http://www.cnsiwi.com) or email us: [brian.vanasten@cnsiwi.com](mailto:brian.vanasten@cnsiwi.com) or [todd.schroeder@cnsiwi.com](mailto:todd.schroeder@cnsiwi.com)



January 11, 2024

IT MANAGED SERVICES PROPOSAL FOR  
**VILLAGE OF KIMBERLY**  
**MAGGIE MAHONEY**

Prepared by:

**Scott Pelishek**  
Technology Advisor  
920.968.1240  
[scott.pelishek@marconet.com](mailto:scott.pelishek@marconet.com)

**Marco Technologies, LLC**  
2305 Kelbe Dr  
Little Chute, WI 54140



**Managed  
Services**



**Copiers &  
Printers**



**Audio  
Visual**



**Business  
IT Services**



## TABLE OF CONTENTS

1. Cover Letter
2. Marco Corporate Overview
  - a. Dedicated Support Team
3. Relevant Experience
4. Support
5. Proposed Approach
6. Financials
  - a. Recommendation/Pricing
7. Project Resources and Support Services
  - a. Certified Solutions/Systems Engineers – Managed IT
  - b. Certified Solutions/Systems Engineers – Data
  - c. Local Engineers, Technicians and Support Specialists
  - d. Project Management Team
  - e. Marco Security Team
  - f. Managed IT Support Services
8. Appendices
  - a. Terms and Conditions
  - b. AmplifyIT Agreement Sample
  - c. Relationship Agreement Sample



January 11, 2024

Village of Kimberly  
Maggie Mahoney  
426 W. Kimberly Ave  
Kimberly, WI 54136

**RE: Cover Letter**

Dear Maggie,

Thank you for the opportunity to partner with Village of Kimberly and provide the following response to your IT Managed Services Request for Proposal.

Established in 1973, Marco is the leading company in integrated technology solutions in the nation with over 1,200 team members committed to our mission of helping clients effectively apply technology that contributes to their success. We proudly serve over 16,500 clients nationally with offices in 16 states throughout the upper Midwest and East Coast, including Wisconsin.

At Marco, we gauge our success by our ability to deliver solutions that help our clients achieve their goals. Based on what we have learned, here's a look at some of the results Village of Kimberly could see by partnering with Marco:

- We are uniquely qualified to address your IT needs as we are a national entity with local Fox Valley resources including:
  - Account Support and Management
  - IT Service Technical Professionals
- Utilizing both national and local professional technical resources to effectively manage your existing IT environment as well as partnering with your team to offer guidance and consulting for future IT initiatives.
- High-end technical expertise that is specialized and security focused
- Providing valuable insight and analytics into your business infrastructure
- Management from a strong team of experienced, highly certified technicians to guide issue resolution, monitoring and future project planning
- Enhanced security with end-user training of potential risks in today's online environment including transparent communication and measurable feedback
- Equipping Village of Kimberly IT leaders with tools to help direct reports excel in their day-to-day tasks
- Improved employee productivity and overall job satisfaction by experiencing less IT issues and faster IT support
- Unlimited access to IT Support Desk 24x7 so that IT leaders can focus on finding new and innovative ways to help drive Village of Kimberly's business goals
- Providing industry leading anti-virus, anti-malware and anti-ransomware software
- Improved visibility into the performance of Village of Kimberly's network and datacenter
- Better short- and long-term planning of Village of Kimberly's IT needs by improved documentation and reporting of your current IT infrastructure



We're passionate about what we do and what to achieve excellence every time. Here's what our clients tell us they appreciate most about Marco:

- **Extensive technical expertise** with over 650 factory-trained, certified systems engineers and technical professionals who can design solutions to promote efficiency, cost-savings and growth
- **Strong vendor partnerships** established over the past 50 years that enable us to provide the best solutions for your business needs
- **Top player in the industry** with a track record of leading innovation and advancements that improve business performance

We understand that business relationships are not immediate and develop over time. A commitment to developing long-term client relationships have driven our growth and established Marco as the trusted company it is today. We look forward to building an ongoing relationship with Village of Kimberly.

Sincerely,

A handwritten signature in black ink that reads "Scott Pelishek". The signature is fluid and cursive, with the first name being more prominent.

Scott Pelishek  
Technology Advisor  
920.968.1240  
[scott.pelishek@marconet.com](mailto:scott.pelishek@marconet.com)

A handwritten signature in black ink that reads "Ann McCann". The signature is cursive and elegant, with the first name being the most prominent part.

Ann McCann  
Sales Director  
920.687.4300 x3069  
[annm@marconet.com](mailto:annm@marconet.com)

## MARCO CORPORATE OVERVIEW

### WHO WE ARE AND WHAT WE DO

Marco is a leading integrated technology services company with 48 locations and over 16,500 clients nationally. Our 51 years of business experience and history of innovation demonstrate our leadership in these areas:

- Copiers/Printers
- Managed Services
- Business IT Services
- Phone Systems
- Cloud Services
- Carrier Services
- Enterprise Content Management
- Audio Visual Systems
- Physical Security
- Shredding Services

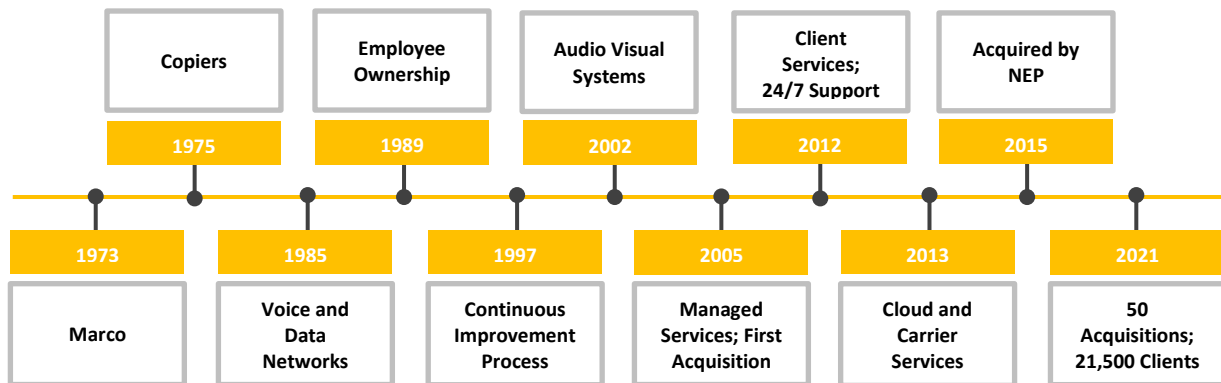


### MARCO'S MISSION

To help our clients effectively apply technology that contributes to their success.

### OUR JOURNEY IN TECHNOLOGY

Originating as a typewriter company in the 1930s, Marco took on the printing industry in 1975, voice and data solutions in 1985 and continued to expand into cloud technologies, software solutions and managed services.



Marco's unique insight on how each critical business tool, application and infrastructure works together will help you leverage your investment, maximize your technologies adoption and improve organizational efficiency.

### FINANCIAL STABILITY

As a low-risk technology provider that has remained strong and profitable, Marco has increased its workforce to over 1,200 employees, expanded to 16 states and 48 locations. Our ongoing commitment to growth contributes to the success of our company and our clients.



#### Revenue:

- 2022 | \$412 million
- 2021 | \$398 million
- 2020 | \$399 million

#### TECHNICAL SUPPORT

When partnering with Marco, you will not only receive a dedicated account team, but you also will have access to over 650 factory-trained, certified systems engineers and technical representatives to keep you aware of the latest technologies. Our full-time dispatchers and Support Desk professionals consistently maintain a 95% live call answer rate and resolve 97% of network service issues remotely. That means better productivity for users.

Here's a look at our remote resolution rates by solution:

- Managed IT | 98%
- Managed Print | 90%
- Network Service | 97%
- Enterprise Content Management | 99%

#### GOLD STANDARD CULTURE

Creating a strong corporate culture takes intention — and a lot of passion. We have both, and you can feel it as soon as you walk in our doors. We take employee satisfaction to heart and consider our team members part of our work family and our Gold Standard Community.



Marco's Gold Standard is focused on building a positive workplace environment – and it's not only for our employees. The Gold Standard includes four pillars: **employee engagement, client satisfaction, community support and vendor partnerships**. We have internal committees dedicated to making each pillar a success because we never settle for less than gold.

#### ADDITIONAL INFORMATION AND RESOURCES

- Learn more about what we do and more importantly, why we do it on our website at [marconet.com](https://marconet.com).
- We offer many [free educational resources](#), such as our webinars, questionnaires, and eBooks.
- Sign up for our [Technology Insights Blog](#) on our website for additional educational tools to help you and your business succeed.

## DEDICATED SUPPORT TEAM

### Marco Technologies, LLC

2305 Kelbe Drive  
Little Chute, WI 54140  
920.687.4300



#### **Scott Pelishek | Technology Advisor**

920.968.1240

[scott.pelishek@marconet.com](mailto:scott.pelishek@marconet.com)

Industry Experience Since 2015

Education: B.A. Business Management/Marketing

Experience: 20+ Years Voice, IT Infrastructure and Network



#### **Jeremy Ryan | Sales Manager**

920.687.4300 x7611

[jeremy.l.ryan@marconet.com](mailto:jeremy.l.ryan@marconet.com)

Industry Experience Since 2003

Education: B.A. Business Management



#### **Ann McCann | Sales Director**

920.687.4300 x3096

[annm@marconet.com](mailto:annm@marconet.com)

Industry Experience Since 1996

Education: B.A. in Business Management and B.S. in Marketing

**Brian Larson | Manager of Project Management Office**

815.962.4990 x6955

[brian.larson@marconet.com](mailto:brian.larson@marconet.com)

Industry Experience Since 1993

Associates Degree in Electronics Communications

Certified: ITIL Foundation

Experience: IT Management, Project Management, Program Management, Infrastructure (Voice and Data) Design and Implementation Enterprise Voice and Data Infrastructure, Cisco Unified Communications/Contact Center Design Focus

**Shawn Barker | Technical Account Management Manager**

815.962.4990 x1546

[shawn.barker@marconet.com](mailto:shawn.barker@marconet.com)

Industry Experience Since 2000

Manages a team of consultants to assist clients in determining the right solutions for their needs in the organization. Additionally, works to stay on top of technology solutions available to help determine what should be made available to our clients.

**Riley Knudson | Solutions Sales Consultant**

815.962.4990 x6141

[riley.knudson@marconet.com](mailto:riley.knudson@marconet.com)

Industry Experience Since: 2019

Education: B.S. in Finance, Marketing, Global Business

Experience: Design of network infrastructure including Cisco, Meraki, Barracuda, Veeam, CrowdStrike, Perch, Microsoft 365 / Migrations. Focus in design of cyber security and managed services solutions.



**Adrian Feigl**

MIT Service Manager  
815.962.4990 x1240  
[adrian.feigl@marconet.com](mailto:adrian.feigl@marconet.com)

Industry Experience Since 1993



**Dennis Jabczynski**

Director of Security and Operations  
815.962.4990 x1727  
[dennis.jabczynski@marconet.com](mailto:dennis.jabczynski@marconet.com)

Industry Experience Since 1981

Certifications: ITIL v3, Lean Six Sigma Green Belt Certification

## RELEVANT EXPERIENCE

a) **Your current and past experience as it relates to the scope of this request for proposal.**

Marco has provided Managed Services since 2005 and is continually recognized as an elite Managed Service provider. In 2023, Marco was featured in Channel Futures' MSP 500 list in the Elite 150 category, and named a top managed service company by Channel Futures for successfully delivering innovative IT solutions while exceeding customer expectations.

Your organization depends on technology every day to keep your business running smoothly. If you're like most small to mid-sized companies, you have a diverse mix of technologies and computer issues to support.

Marco's Managed IT Services, AmplifyIT, is designed to help support your day-to-day IT maintenance issues and provide end-user assistance, so you can focus on managing your business.

All of Marco's Managed IT Services include remote support from our dedicated Managed Services team and on-site support from over 650 factory-trained, certified systems engineers and technical representatives throughout the nation.

In addition, our local Fox Valley based technicians are a differentiator in coordinating national resources into local effectiveness.

b) **References of other Municipalities/Organizations for which your firm provides or has provided these services; or, work similar to that involved in this request for proposal.**

We value our client relationships and protect their information. Out of professional courtesy, if you wish to speak directly to our references, please allow us to arrange. You can also visit our website at <https://www.marconet.com/resources> to learn more about our customers' experience in partnering with Marco for their technology solutions.

**Kimberly Area School District**

425 S Washington St  
Combined Locks, WI 54113  
**Contact:** Becky Hansen

**Immel Construction**

1820 Radisson Street  
Green Bay, WI 54302  
**Contact:** Steven Shulse, CISSP

**Village of Little Chute**

108 W Main Street  
Little Chute, Wisconsin 54140  
**Contact:** Penney Mack



**Pinkert Law**

454 Kentucky Street, P.O. Box 89  
 Sturgeon Bay, WI 54235  
**Contact:** Laura Peterson

**City of Middleton**

7426 Hubbard Ave  
 Middleton, WI 53562  
**Contact:** Drew Montour

- c) **Municipal government experience. Preference will be given to respondents who provide these services for municipal government.**

**WE KNOW GOVERNMENT**

**Over 2,100 Government Clients**

Wisconsin	Illinois	Iowa	Maryland	Michigan	Minnesota
Outagamie County	City of Moline	City of Cedar Falls	District Court of Maryland	Keweenaw Bay Indian Community	Wright County
Village of Little Chute	State of Illinois – Office of the Appellate Defend	City of Council Bluffs	Maryland Dept. of Public Safety & Correct.	St Clair County	Anoka County Purchasing
City of Kaukauna	City of Rockford	Linn County AOB	Anne Arundel County Circuit Court	City of Romulus	Fillmore County Courthouse
Fond Du Lac County Government Center	Rockford Housing Authority	Black Hawk County Courthouse	MD State Department of General Ser	City of Grosse Pointe Woods	City of St. Paul Police
Dane County	Winnebago County Housing Authority	Story County	Anne Arundel County Detention	City of Allen Park	Clay County
Green Bay Metro Sewerage	County of Pike	City of Marengo	Anne Arundel County Health Department	Lapeer City	City of St Cloud
City of Appleton	La Salle County Health Department	Cerro Gordo County Public Health	Administrative Office of MD Courts	Hannahville Indian Community	Meeker County Information Tech Dept
Wisconsin Dept of Corrections	City of Peru	Ft Dodge Correctional Facility	Anne Arundel Co Office of the States Attorney	Lapeer County Sheriff's Department	Stearns County
City of Middleton	La Salle County Circuit Clerk	Black Hawk County Sheriff	Anne Arundel County Dept of Aging	Charter Township of Orion	Otter Tail County
Marathon County	City of Streator	City of Mason City	Anne Arundel County Planning & Zoning	36 <sup>th</sup> District Court	City of Brooklyn Park

Missouri	Nebraska	New Jersey	North Dakota	Pennsylvania	South Dakota
St Louis County Police Dept	City of South Sioux City	Township of North Brunswick	City of Grand Forks	Supreme Court of PA	Sisseton Wahpeton Oyate
St Louis County Dept. of Public Health	City of Omaha	Borough of Eatontown	Williams County	Superior Court of Pennsylvania	SD Central Duplicating
Texas County	Douglas County	Township of Howell	Community Action Program – Bismarck	Lycoming County Courthouse	CRST Public Health
MO Dept of Corrections – Central Office	Papillion Planning Department	High Bridge Police Department	Grand Forks County	Commonwealth Court of PA	Flandreau Santee Sioux Tribe
St Louis County Parks & Recreation	Village of Waterloo	Township of South Brunswick – Municipal	Cass County	Admin Office of PA Courts	SD Dept of Social Services
MO Dept of Corrections	OPPD (Omaha Public Power Department)	Long Beach Township	State of North Dakota OMB	Dauphin County Housing	SD Legislative Research Council
St Louis County Justice Services	Dakota County Corrections	Township of Jackson	McLean County	Sullivan County	Indian Health Service – Aberdeen
MO Dept of Corrections – Chillicothe	Cass County Public Defenders	Borough of Bernardsville	Ward County	Wyoming County Commissioners	City of Rapid City Finance Office
Supreme Court of Missouri	City of Papillion		City of Watford	County of Lehigh	City of Sioux Falls
Cole County Circuit Court Clerks Office	City of Wakefield			Tioga County Emergency Services	Oglala Sioux Tribe

## SUPPORT

- 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.**

To contact Marco's Support Desk, you can email requests to [mit@marconet.com](mailto:mit@marconet.com), use our online service request process through our **client portal** at [portal.marconet.com](https://portal.marconet.com) or call 800.847.3097.

### Service Hours

- **Support Desk and Remote Support** is available Monday - Friday, 7:00 a.m. to 5:00 p.m. (CST), excluding Marco's published holidays\*. As an option, 24x7x365 support is also available for an additional cost.
- **On-site Support and Maintenance** is available Monday - Friday, 8:00 a.m. to 5:00 p.m. (CST), excluding Marco's published holidays\* (for issues that can't be resolved remotely through Marco's Support Desk).

\*Marco's published holidays include New Year's Day, Good Friday (close at 12:00 p.m.), Memorial Day, Independence Day, Labor Day, Thanksgiving Day, Friday after Thanksgiving, Christmas Eve, Christmas Day and New Year's Eve (close at 3:00 p.m.).

### Service Policy/Preventative Maintenance

As part of our Support Desk, the Rapid Resolution Team answers your call "live" to help determine the urgency and severity of your request. The Rapid Resolution Team will also work to resolve standard requests and will provide a warm call hand off to your dedicated care team for all other service repairs or in-depth requests. (Rapid resolution team resolves about a third of tickets that come in through our support desk) In the rare case that remote support is not enough, an engineering technician will be sent on-site.

When a technician is dispatched on-site, they are trained to complete the service call, including any preventative maintenance not isolated to the service in question.

### Response Times

As part of our Support Desk, the Triage Team answers your call "live" to help determine the urgency and severity of your request. The Triage Team will also work to resolve standard requests and provide a hand off to a dedicated skillset Specialist or Escalation Engineer for all other service repairs or in-depth requests. In the rare case that remote support is not enough, a technician or engineer will be sent on-site.

On occasion, there might be situations where our standard service protocols do not meet your specific needs. During such infrequent instances, we request that you utilize the Marco portal at [portal.marconet.com](https://portal.marconet.com) to escalate your request providing a simplified escalation process with the click of a button to prompt the assigned technician.

### Service Level Targets

PRIORITY	RESPONSE TIME	EXAMPLES
1	1 HOUR	<ul style="list-style-type: none"> <li>• Server or system outage causing a significant business impact</li> <li>• Cyber security events that are actively compromising systems or data</li> <li>• Data loss or corruption</li> <li>• Major application failure with no workaround</li> </ul>
2	4 HOURS	<ul style="list-style-type: none"> <li>• Unable to access critical business applications or data</li> <li>• Performance degradation of systems causing significant business impact</li> <li>• Cyber security events that have the potential to compromise systems or data</li> <li>• Workstation or laptop hardware failure affecting productivity</li> </ul>
3	NEXT DAY	<ul style="list-style-type: none"> <li>• Non-critical business applications or services are unavailable or degraded</li> <li>• Printer or peripheral device failure</li> <li>• Account access or credential issues for non-critical accounts</li> </ul>
4	ONE WEEK	<ul style="list-style-type: none"> <li>• Non-urgent issues with device or applications</li> <li>• Requests for new hardware or software installations</li> <li>• New account creations</li> <li>• General how-to or requests for information</li> </ul>

We currently have a 95% live call answer average for support calls. We receive over 18,100 phone calls/month through our Support Desk.

### Escalation Process

Marco’s Managed IT ticket escalation process is:

1. Rapid Resolution Team
2. Color Care Team
  - Tier 1
  - Tier 2
3. Team Supervisor
4. Advanced Security Team/Advanced Network Team
5. Field Tech Services Team

### Service Call Survey

Feedback is very important to Marco and the information received from our customers is used to resolve any issues, make improvements and enhance our support services. After each service ticket is closed, a follow-up survey is emailed to the end user. Marco’s Care Team supervisor reviews the survey results and contacts customers who provided a neutral or negative response. Marco’s Managed IT service call survey has a positive average rating of 94.9% for the past 12 months.

### Certified Systems Engineers and Technical Representatives

Marco has over 650 factory-trained, certified systems engineers and technical representatives who go on-site to serve communities throughout the nation. Customers will have dedicated technicians assigned to them based on geography and machine type. Marco has built solid relationships with its vendors over the past 50 years. We have the product experience, technical expertise and staff to provide the best solution and a successful implementation with ongoing service/maintenance. Marco’s professional



certifications can be found on our website at <https://www.marconet.com/about/why-marco/professional-certifications>.

### **Help Desk Locations**

Marco's support desks are located across the upper Midwest with our largest support centers being located in St. Cloud, MN & Minnetonka, MN.

- 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 Project Manager will provide communication templates that can be used to help create a customized communication to your employees about the Managed Services Support they will start receiving. In addition, they will set-up a meeting to provide training and review the support desk details with your company point of contact(s) and introduce them to Marco's points of contacts after the Go Live date. This training will provide the point of contact all the information they need to know for initial support and expectations after the Go Live date.

- c. **What options are available for user training and technical training that may be required by our staff?**

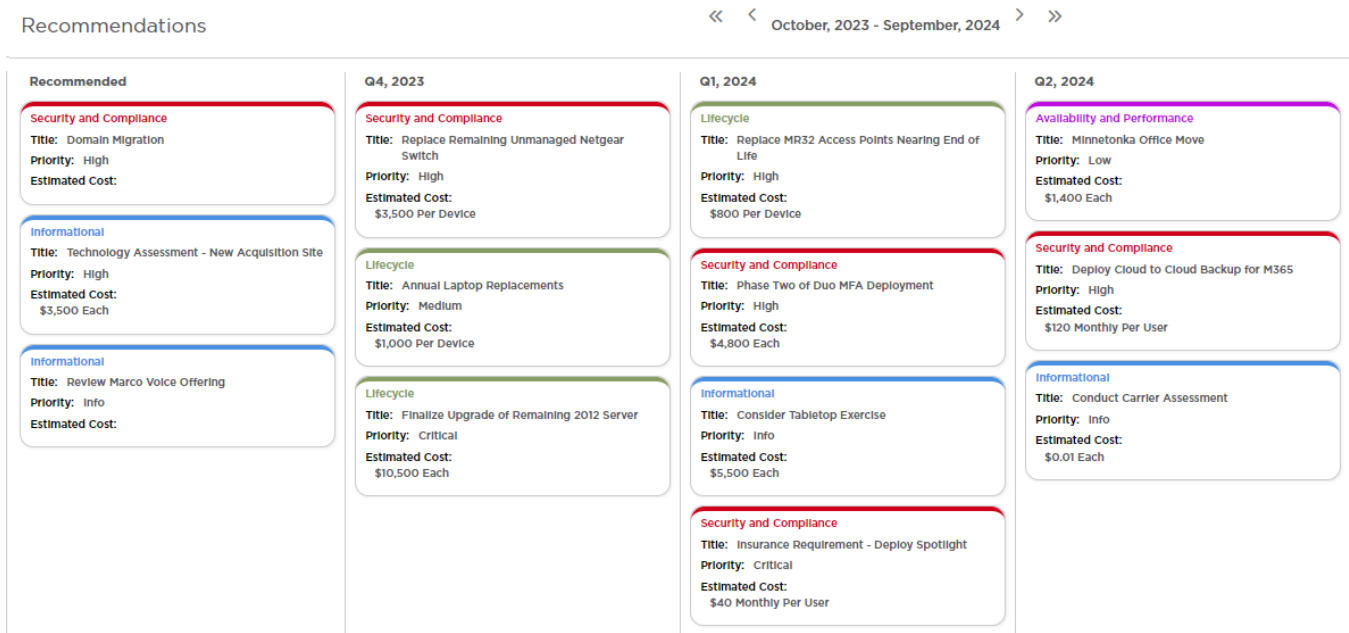
Marco does not provide user and technical training specific to different software systems or applications but can certainly engage on conversations around what is needed for the client to be successful in this training by utilization of our wide array of vendor partners who may be able to provide scoped training as needed. Cyber security awareness training modules and simulated phishing testing is included on an ongoing basis.

## PROPOSED APPROACH

Please provide a proposed work plan for a migration of these services to your company. Specifically, provide the following information:

- a) Key activities
- b) Timing
- c) Information/resource requirements

Upon award, Marco would begin the onboarding process by scheduling a gifted technology assessment to confirm all relevant assets and review configurations for readiness of Marco managed services. This would provide an output summarizing recommended concerns and a dynamic roadmap to begin budgeting accordingly for replacement. (Example Below)



Marco requires networking equipment and associated operating systems be under support and an active support agreement in place to be able to leverage escalated support if necessary. Additionally, Active Directory services are a hard requirement to be able to deploy managed services.

Our standard Managed IT bring-on is outlined in the below image, but there may be flexibility on a case-by-case basis depending on timeline requirements:



## FINANCIALS

a) **Describe the pricing model that you typically employ for your standard services.**

Our typical pricing model employs a per user price with a monthly base fee and any associated relevant uplifts (managed backup, security appliances, etc.)

Additionally, we charge an implementation fee equivalent to one month of the monthly recurring value of the contract. This accounts for the 6–8-week onboarding process and over 100 hours our professional onboarding team puts into each project.

b) **Explain your rate structure. Is it an hourly rate, monthly retainer, or other structure? Elaborate on how the rates would be applied, for instance, different support proposal items may require a different rate application.**

Our rate structure is a fixed monthly fee that includes unlimited helpdesk support, a grouping of security tools and all overarching services itemized in the included executive summary. The agreement encompasses break/fix support, but any project related and/or IT enhancements fall outside of the scope of the agreement and would be billed separately.

Our managed services clients can also create a block of preferred hours that allocates a percentage discount off any service labor procured outside of the managed services agreement. Marco publishes a service catalog that itemizes everything within the scope of the agreement that are included, are not included but can be performed at billable rates & overall tasks that cannot be covered. [Marco's AmplifyIT | Service Catalog \(marconet.com\)](https://marconet.com)

c) **Do you offer service bundles? If so, describe the effect of bundling on pricing.**

Marco has a loyalty program (STAX) that provides a \$100.00 per month discount for relevant additional services rendered that qualify such as voice as a service (VaaS), qualifying managed print agreement, etc.



## RECOMMENDATION/PRICING

### CURRENT SITUATION

We appreciate the opportunity to present this summary that outlines our Cyber-Security Focused AmplifyIT Solution for Village of Kimberly. Marco is the largest independently owned technology services provider in the country, servicing over 16,500 customers throughout the upper Midwest, East Coast and nationally. If chosen for this strategic partnership, our commitment is to be your trusted IT partner, helping you reduce risk against cyber-threats and streamline business operations through centralized support to maximize your technology.

As an integral part of your organization's critical support team, we will be serving as subject matter experts, working with your core team members through involvement, collaboration, development, and refinement of the following:

- Maintaining the confidentiality, integrity, and availability of your company's critical data infrastructure through our AmplifyIT Services.
- Providing ongoing assistance to you and your team through our dedicated support teams.
- Maintaining the security of your network and key systems from unauthorized access and unscheduled downtime through our unique detection/response security services.
- Provide recommendations on technology decisions that align with the National Institute of Standards and Technology (NIST) framework.
- Help you save money by maximizing automation and efficiency through better utilization of your technology.

### BUSINESS VALUE TO YOUR ORGANIZATION

The value of creating this partnership is as follows:

- Allows you to focus on your business, not getting bogged down with technology issues, research, or end-user problems.
- An ongoing management program such as this reduces downtime and technical failures, as well as minimizing operator errors that lead to data loss and business interruption.
- Providing intelligence that will allow you to respond to cyber-attacks and disruptions with minimal business impact.
- Access to our large bench of technical experts without having to hire and maintain this costly expertise in-house.
- 24x7 access to high-level technical and security expertise in the event of an emergency or unexpected outage/disruption.
- We provide ongoing business reviews to help you make the necessary decisions to grow your business leveraging technology.

### MEASUREMENTS OF SUCCESS

Success will be determined by:

- Improvements in internal end-user experience.
- Improved customer experience through a series of proactive measures and on-going business reviews.
- Cost reductions utilizing more efficient technology solutions.
- Improved response times resulting in minimal downtime.
- Improving your visibility into your IT environment and applications.
- Enhancing your posture around the ever-evolving world of cyber security.
- Allowing your team to focus on revenue generating activities vs IT.



## METHODOLOGY

The following components will be used to achieve the desired outcomes:

- **IT Infrastructure Management & Monitoring:** Your network, servers, workstations, mobile devices and applications require ongoing support. Through our offering, we've included a mix of software, people and processes to maintain network and system stability, data integrity and uptime. Our Operations Center will be monitoring your systems 24x7x365, helping you maintain a stable computing environment that will allow you to service your customers with minimal interruption.
- **Remote Support:** As your team encounters technology related issues, your dedicated remote Support Desk team will be available to help. Your organization will be assigned a helpdesk team of roughly six to ten IT experts. This allows our organizations to best understand company culture, build strong personal relationships and increase efficiency as our teams work more fluently together. You'll have the comfort of a small company feel with the peace of mind knowing Marco has over 650 certified systems engineers and technical representatives on staff to support you. When calling Marco's Support Desk, your employees will get a live person 95% of the time. Other options of gaining support are via email, online chat and through our self-service portal. In addition, Marco will collaborate with your third-party providers (software companies, internet providers, etc.) to quarterback issues and avoid finger pointing.
- **On-Site Support:** Included in our offering is the on-site support component in the event of an IT issue requiring on-site service. In the event of a system failure, connectivity issue or security incident, which cannot be handled remotely, our team will respond with on-site service, helping you get your business back online as soon as possible.
- **Managed Security Program:** The most important aspect of your IT environment is your data. Security issues that involve a loss of privacy or confidentiality, integrity or access will be handled upon any alert. Through this program, our team of highly trained security experts will be monitoring all data coming and going from your company. In the event that any attempted breach or malware is detected, our team will respond promptly. Real-time detection and response are the key to strong security.
- **IT Environment Reviews:** We are confident in the tools we will be deploying but as an added layer of checks/balances, on a regularly scheduled basis your assigned Solution Engineer will be conducting a review of your IT environment. The review is based upon an extensive checklist and upon the review, the technical resource will conduct a scheduled video call to review findings and address any areas of concern.
- **Business Reviews:** Every strategic decision made by company leaders today hinges on the right technology decisions. Most small businesses are not able to maintain highly qualified Chief Information Officers (CIO) or Chief Information Security Officers (CISO). As an added service, we will meet with you on a regular basis to provide key performance metrics, intelligence into what is happening inside your network, what types of threats we are seeing and blocking and areas where we believe you can gain efficiencies or competitive advantage by changing how you use and interact with technology.

We appreciate the opportunity to work with you to make this a successful partnership. Please let me know if there are any questions or things, I can be doing to make this a success.

Thank you,  
Riley Knudson, Solutions Sales Consultant



## AmplifyIT Investment Overview

Procurement	<p>Pricing is Based Upon 25 Total Users</p> <ul style="list-style-type: none"> <li>Additional Knowledge Users Will Incur a \$94.00 Per User/Month Uplift</li> </ul>
Support Teams	<ul style="list-style-type: none"> <li>Rapid Resolution (Initial Triage and Remediation)</li> <li>Assigned (CARE) Helpdesk Team of 6-12 Remote Technicians</li> <li>Field Engineering Team</li> <li>Advanced Security Team</li> <li>Technical Account Manager</li> </ul>
Proactive System Administration	<ul style="list-style-type: none"> <li>Regularly Scheduled Client Business Reviews &amp; Technology Road Mapping</li> </ul>
Onsite Support	<ul style="list-style-type: none"> <li>Escalation to Field Services for Issues That Cannot Be Remotely Resolved</li> </ul>
Data Backups	<ul style="list-style-type: none"> <li>Microsoft 365 (Email, Teams, SharePoint, OneDrive) Cloud-Based Data Backup Solution</li> <li>Server Backup Solution Available Upon Formal Sizing Exercise (Not included in pricing)</li> </ul>
Monitoring	<ul style="list-style-type: none"> <li>24x7x365 Enhanced Network Management &amp; Monitoring</li> <li>24x7x365 End-User Device Management &amp; Monitoring</li> <li>24x7x365 Server Management &amp; Monitoring</li> <li>24x7x365 Security Operations Center (SOC)               <ul style="list-style-type: none"> <li>Threat Detection/Management/Intelligence + 30-Days Data Logging (SIEM)</li> <li>Network Threat Sensor Installed at Physical Office Location – Need confirmation of network equipment to determine proper scope</li> </ul> </li> </ul>
Patch Management	<ul style="list-style-type: none"> <li>Microsoft Windows (Server + End User Devices) Patches &amp; Updates</li> <li>Third-Party Application Patching (ex. Adobe, Java, Chrome, etc.)</li> </ul>
Additional Managed Services Tools	<ul style="list-style-type: none"> <li>IT Hardware/Software Lifecycle Management &amp; Reporting</li> <li>Endpoint Vulnerability Scanning</li> <li>Next Generation End-Point Protection               <ul style="list-style-type: none"> <li>Threat Detection + Threat Hunting + Response</li> </ul> </li> <li>Web (Internet) Security to Protect Users from Clicking on Malicious Links</li> <li>Email Security with Advanced Threat Protection</li> <li>Email Security Spear-Phishing Protection with Built-In Artificial Intelligence</li> <li>Multi-Factor Authentication               <ul style="list-style-type: none"> <li><b>Requires Specific Microsoft Licensing</b></li> </ul> </li> </ul>
End User Security Training	<ul style="list-style-type: none"> <li>End-User Security Training Program</li> <li>Regularly Scheduled Email (Security) Phishing Campaigns</li> </ul>
On-Boarding	<ul style="list-style-type: none"> <li>Installation of Management Tools</li> <li>Documenting IT Environment and Processes</li> <li>Gifted Technology Assessment (\$3,500.00 Value)</li> </ul>
Monthly Investment	<p>\$2,850.00/Month for 36-Months with a One Time \$3,320.00 On-Boarding Fee</p> <ul style="list-style-type: none"> <li>Quote Does Not Include Any Microsoft 365 Licensing (or Required Uplifts)</li> <li>Quote Does Not Include Server Data Backups</li> </ul>
Clarifications / Exceptions	<p>Microsoft Licensing Needs Business Premium / Entra ID P1 Licensing for Integration Backup Pricing TBD Based off Data / Number of Servers</p>



## PROJECT RESOURCES AND SUPPORT SERVICES

- a. Dedicated Support Team
- b. Certified Systems Engineers and Technical Representatives – Managed IT
- c. Certified Systems Engineers and Technical Representatives – Data
- d. Project Management Team
- e. Marco Security Team
- f. Managed IT Support Services

## CERTIFIED SOLUTIONS/SYSTEMS ENGINEERS

### Managed IT (MIT) Services

#### CORPORATE LEADERSHIP



**Glenn Middlekauff | Chief Service and Automation Officer**

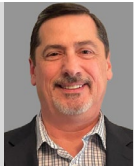
- Industry Experience Since 1990



**Adrian Feigl | MIT Service Manager**

- Industry Experience Since 1993

#### SERVICE LEADERSHIP



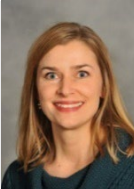
**Dennis Jabczynski | Director of Security and Service Operations**

- Industry Experience Since 1981
- Certifications: ITIL v3, Lean Six Sigma Green Belt Certification



**Kham Thepsombath | MIT Service Manager**

- Industry Experience Since 2011



**Terri Gill | Operations Manager**

- Industry Experience Since 2000



**Keith Anderson | Data Center Manager**

- Industry Experience Since 1996



**RAPID RESOLUTION TEAM****Tier 1 Technicians**

**Service Role** | Triage new client requests to better understand the requirements, and to resolve many change requests and quick remediations.

**TEAM LEADERSHIP****Danielle Vickstrom | MIT Service Manager**

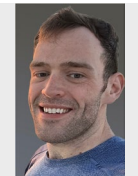
- Industry Experience Since 2014

**SUPPORT RESOURCES****Amanda Kasper | Support Desk Technician**

- Industry Experience Since 2018
- A.A.S Degree in Network Administration
- Experience with Active Directory, desktop hardware and Microsoft Office

**Andy Ketterman | Rapid Resolution Specialist**

- Industry Experience Since 1996
- Experience with Microsoft operating systems. Extensive experience designing, implementation and installation of local area networks, including Active Directory, DNS, DHCP and application setup and installation, both in wired and wireless topologies. Extensive experience in troubleshooting hardware and software for all major computer and printer manufacturers involving onsite and over the phone Support to clients and current employees. Strong ability to research in depth issues and problems to resolve issues in a timely and cost-effective manner.

**Anthony Nowak | Rapid Resolution Specialist**

- Industry Experience Since 2003
- Experience with Active Directory and Microsoft 365
- Certifications: CompTIA A+ and CompTIA Network+

PHOTO  
COMING  
SOON**Austin Flemming | NOC Rapid Resolution Specialist**

- Industry Experience Since 2021

PHOTO  
COMING  
SOON**Blake Ness | Cloud Voice Provisioning Technician**

- Industry Experience Since 2021

**Corey Leegaard | Rapid Resolution Specialist**

- Industry Experience Since 2019
- Experience with desktop Support and Office Applications

**Jacob Hobbs | Rapid Resolution Technician**

- Industry Experience Since 2020
- B.S. Degree in Computer Science and Biology
- Certifications: CompTIA Network+, CompTIA Project+, ITIL Foundations
- Experience with: Active Directory, O365 Suite, Microsoft Server, Barracuda, Spam Titan, Exchange, Mosaic, ConnectWise, and E-Automate

**Michael Heywood | MIT Rapid Resolution Technician**

- Industry Experience Since 1982
- Certifications: Microsoft CNA, CompTIA A+ and CompTIA Network+

**Nate Randolph | Support Desk Technician**

- Industry Experience Since 2010
- A.A.S. Degree Cisco Network Technician.
- Certifications: CompTIA A+, CompTIA ITF+
- Experience with Active Directory, desktop hardware, Microsoft Office, networking hardware/software

**Nick Harper | NOC Rapid Resolution Specialist**

- Industry Experience Since 2021

**Peter Spellacy | Voice Rapid Resolution Specialist**

- Industry Experience Since 2015
- A.A.S. Degree in Business Administration

**Ryan Reyes | Rapid Resolution Technician**

- Industry Experience Since 2019
- Certifications: Front-End Web Development

**Scott Hanneken | Support Desk Technician**

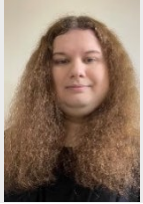
- Industry Experience Since 2015
- Experience with T1/T2 tech Support

**Stephen Stewart | Rapid Resolution Specialist**

- Industry Experience Since 2015
- Experience with end user technical Support

**Stephen Jones | Rapid Resolution Specialist**

- Industry Experience Since 2021
- B.S. Degree in Information Systems Management

**Steven Logan | Rapid Resolution Specialist**

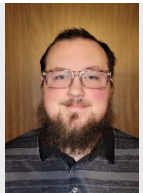
- Industry Experience Since 2016
- Experience with Citrix, Active Directory, VPN (Global Protect, Cisco AnyConnect), Basic Knowledge of Oracle and SAP systems (Password Resets/Unlocks), Various Ticketing systems (SNow, Salesforce, ConnectWise, Ivanti)

**Tyler Myers | Rapid Resolution Specialist**

- Industry Experience Since 2023
- A.S.S. in Armament Systems Technology and Business
- Experience with BuildIT, AutoCAD, and Microsoft Programs

**Wadner Charles | Rapid Resolution Technician**

- Industry Experience Since 2020
- B.A. in Business Administration
- Experience with active directory, remote technical support, Nessus, Windows servers, Microsoft 365

**William Preston | Rapid Resolution Specialist**

- Industry Experience Since 2014
- Experience with Active Directory, SQL Server, Linux OS, A+ and Net+, AWS

**Xavier Latawiec | Rapid Resolution Technician**

- Industry Experience Since 2022
- Bachelor of Science degree in Information Technology Management and a Minor in Computer Information Systems
- Certifications: CompTIA A+ Certified
- Experience with Active Directory, desktop hardware and Microsoft Office

**CLIENT CARE | BLUE TEAM****Tier 2 Technicians****Industry Specialization** | Security, Financial, State/Counties/Cities, Insurance**Team Specialization** | Security**Service Role** | Remediate application, server and break-fix requests.

**TEAM LEADERSHIP****Nathan Fetterley | Support Desk Supervisor**

- Industry Experience Since 2014

**SUPPORT RESOURCES****Alex Ryken | Support Desk Technician**

- Industry Experience Since 2016
- A.A.S. Degree Software Support
- Experience with Hardware Repair, Active Directory, Support Desk, Software Support

**David Ottoson | Support Desk Specialist**

- Industry Experience Since 1993

**Jacob Friedl | Support Desk Technician**

- Industry Experience Since 2021

**Jeremy Primus | Support Desk System Engineer**

- Industry Experience Since 2016
- Experience with Microsoft servers, Exchange email, Support desk, desktop and server Support and Toshiba E-bridge

**Josh Hafner | Support Desk Specialist**

- Industry Experience Since 2010
- B.S. Degree, Science and Technology Management
- Certifications: CJIS Level 4
- Experience with Microsoft Windows/Server/365/Exchange, Veeam, VMWare ESXI, Barracuda, Networking, PAN-OS, Aruba AOS, Network Segregation, Linux (Ubuntu, Debian, Raspbian, Kali, Mint), Ubiquiti Unifi, TP-Link Omada, Cisco Meraki, WireShark, Nessus, Dell Storage Manager/Unisphere, Penetration Testing.

**Matthew Nix | Support Desk Specialist**

- Industry Experience Since 2013
- Experience with Microsoft servers, VMware Virtualization, Hyper-V, VPN, Windows Operating Systems, Exchange email, O365, Active Directory, desktop Support, Dell and HP PC's and laptops



**Quentin Kintigh-Smith | Support Desk Technician**

- Industry Experience Since 2006
- Associate degree in information technology
- Experience with Windows Operating Systems, Office 365 administration, Exchange, Support desk, desktop and server Support



**Yohan Kim | Support Desk Specialist**

- Industry Experience since 2012
- A.A.S Degree in Network Administration
- Experience in network troubleshooting and management, administering Windows environments, software and hardware troubleshooting

**CLOUD IMPLEMENTATION**

**Service Role** | Escalation point for Tier 1 and Tier 2 request remediation.



**Jesse Rodriguez | MIT Implementation Specialist**

- Industry Experience Since 2013
- A.A.S Degree in Network Administration
- Certifications: Cisco Network Associate, Webroot WSAC Endpoint Technician and Meraki Networking Associate (CMNA)
- Experience with desktop Support and networking, HP, Lenovo and Dell PCs/Laptops, Antivirus/Malware Removal and VMware Virtualization



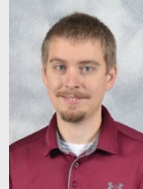
**Cathy Graves | MIT Implementation Specialist**

- Industry Experience Since 1995
- Masters in IT Project Management
- Certifications: CompTIA A+, Network+, Security+, Project+ and Convergence+ Certified, Microsoft Professional (MCP), Microsoft Solutions Associate (MCSA), Microsoft desktop Support Technician (MCDST)



**Chad Beaty | MIT Implementation Specialist**

- Industry Experience Since 1998
- Certifications: CMNA, MCSA
- Experience with Windows, server, firewalls, switches, access points, Auvik, Liongard, Perch, O365



**Shawn Grover | Cloud Network Engineer**

- Industry Experience Since 2013
- B.S. Degree in Network Administration and Security
- Certifications: CCNA, JNCIA
- Experience with network services, ISP service delivery, next generation firewall services, VPN and remote access technologies, datacenter management and core networking from Enterprise deployments to multi-site MPLS/VPLS management on dedicated circuits or services



**Scott Chilson | MIT Implementation Specialist**

- Industry Experience Since 2012
- A.A.S. Degree in Network Administration and A.A.S. Degree in Information Security.



**Wayne Gamradt | Cloud Network Systems Engineer**

- Industry Experience Since 1993
- A.A.S. Degree in Computer and Voice Technologies
- Experience with Linux, Microsoft Azure IaaS, Azure Virtual Desktop, Active Directory, DNS, Routing/Switching, Windows Servers Remote Desktop, Virtualization, and Scripting



**Tony Wegscheid | MIT Implementation Specialist**

- Industry Experience Since 2003
- A.A. Degree in Computer Networking with an MCSE Emphasis
- Certifications: CompTIA Network+ and Server +, Level 4 CJIS Security Training, VMWare VTSP – Foundation Certification, Webroot WSAB Endpoint Technical Certification for Partners
- Experience with Windows desktops, laptops and servers, Cisco, Meraki, HP and other manufacturer networking infrastructure

**NETWORK SUPPORT**

**Tier 3 Technicians**

**Service Role** | Escalation point for Tier 1 and Tier 2 request remediation.

**TEAM LEADERSHIP**



**Adrian Feigl | MIT Service Manager**

- Industry Experience Since 2002
- Experience with customer service, operational and advanced technical Support, Wide-Area networking and LEAN

**SUPPORT RESOURCES**



**Brandon Moore | Senior Support Desk Systems Engineer**

- Industry Experience Since 2012
- Certifications: Microsoft Certified Professional, Brocade Certified Network Associate
- Experience: Windows server, Microsoft Exchange, Office 365, Azure, VMware, Voice and networking



**Brandon Wilcken | Support Desk Supervisor**

- Industry Experience Since 2007
- Experience: Advanced Scheduling Coordination, Resource Management, Dispatch/Regional Board Management, Data, Voice and AV, Training and Relationship Management



**Dave Christianson | Network Escalation Engineer**

- Industry Experience Since 1993
- Cisco Certifications: Network Associate - Security, Network Associate - routing and switching, Entry Networking Technician.
- Microsoft Certifications: I.T. Professional – 2008r2 Enterprise Administrator, Systems Administrator –server 2008r2, Technology Specialist: Windows server 2008r2 Active Directory, Technology Specialist: Windows server 2008r2 network Infrastructure, Technology Specialist : Windows server 2008r2 Applications Infrastructure, Professional – Windows 7.

- Certifications: Wireless Network Administrator, Wireless Technology Specialist
- Experience with HPE/Aruba switching, Extreme networks switching and Wireless networking, FortiNet Firewalls, trained in LEAN/5S processes



**Jeremy Buersken | Network Escalation Engineer**

- Industry Experience Since 2000
- Certifications: CNNA and Security+
- Experience with telecommunications, digital voice, VOIP and network infrastructure



**Mike Ohmann | Network Escalation Engineer**

- Industry Experience Since 1987
- Experience with Cisco routing switching and Firewalls, Cisco Meraki network systems, HP and other Manufacturer networking Infrastructure, Fortinet, SonicWALL, WatchGuard Firewalls, Content filter, Wireless network Systems, Virtual Private networks, Microsoft Windows servers and desktop/Laptop Operating Systems, server and PC/Laptop hardware, MS Exchange and Office 365, DHCP, DNS, RADIUS, LDAP, Active Directory, Remote desktop Services and Physical Security

**NETWORK OPERATIONS CENTER (NOC)**

**Service Role** | Manage and administer software included for Managed Services clients.

**TEAM LEADERSHIP**



**Mark Schuh | Vulnerability Analyst**

- Industry Experience Since 2003

**SUPPORT RESOURCES**



**Alissa Schirmer | NOC Rapid Resolution Specialist**

- Industry Experience Since 2016
- A.A.S. Degree in Network Administration
- Certifications: Webroot DNS Protection, Webroot Business Endpoint Protection
- Experience with Microsoft OS and Office Applications, desktop hardware and Technical Support, Antivirus Remediation, Active Directory and Office 365 Administration



**Angelina Nunez | Network Engineer**

- Industry Experience Since 2005
- B.A.S. Degree in Computer Science



**Emanuel Spooner | Network Engineer**

- Industry Experience Since 2000
- Experience with Active Directory, Windows server, desktop Support and O365

**Mark Long | Network Engineer**

- Industry Experience Since 2002

**Jason Connell | Network Engineer**

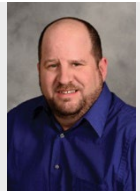
- Industry Experience Since 2015
- A.A.S. Degree in Computer and Voice networking and A.A. Degree in Information Systems
- Certifications: Automate Expert, Automate Professional, Barracuda Backup, Barracuda ESS, Webroot Endpoint Security and CJIS
- Experience with Cisco routing/switching, Windows operating systems, Linux Operating systems, MAC Operating Systems, Microsoft SQL server, MySQL, PowerShell and Python

**Jason Holcomb | Network Engineer**

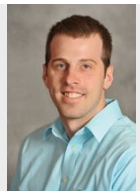
- Industry Experience Since 2009
- A.A.S. Degree in Cisco Networking and IT Security
- Certifications: Windows server 2016 MCSA and Meraki CMNA

**Jay Smith | NOC Rapid Resolution Specialist**

- Industry Experience Since 2016
- A.A.S. Degree in Network Administration and A.A.S. Degree as Computer Support Technician
- Certifications: CompTIA A+ and Cisco Meraki CMNO

**Jeff Marciniak | Network Engineer**

- Industry Experience Since 2008
- A.A.S. Degree in Network Administration/Analyst
- Certifications: Webroot Antivirus

**Kyle Becker | Network Engineer**

- Industry Experience Since 2008
- Certifications: CJIS, Barracuda Email Security and Backup Engineer and Webroot Endpoint Technical Support
- Experience with Windows server and desktop OS, Kaseya, and LabTech

**Ray Rangel | Network Escalation Engineer**

- Industry Experience Since 2000
- Associates Degree in Information Technology
- Certifications: Cisco ICND1 and ICND2 CCNA
- Experience with servers, switching, routing, AP and Workstations and networking



**Seth Luby | Network Engineer**

- Industry Experience Since 2005
- Experience with Windows applications and Windows operating Systems, Linux operating systems, QNX operating systems, general networking and routing, designing and building servers/desktops
- Certifications: Cisco ICND1 and ICND2 CCNA
- Experience with servers, switching, routing, AP and Workstations and networking

**Tom Vossen | Network Engineer**

- Industry Experience Since 2016

**Wes Seelen | Network Engineer**

- Industry Experience Since 2009
- Experience with Exchange, Active Directory, Windows server and Cisco routers and switches

**ON-SITE SUPPORT TEAM**

**Primary Service Role** | Provide reoccurring and proactive maintenance.

**Secondary Service Role** | On-site escalation for requests unable to be resolved remotely.

**SUPPORT RESOURCES****Jamie Leinen | Network Systems Engineer**

- Industry Experience Since 2016
- A.A.S. Degree in Computer networking Technology
- Certifications: CMNO and CMNA

Experience with Cisco routing and switching, Meraki Security Appliances, Active Directory, Microsoft Azure, Office 365, pfSense firewalls, Windows Operating Systems, Linux Operating Systems and Workstation\laptop Repair

**IT REMOTE SUPPORT TEAM****Tier 2 Technicians**

**Service Role** | Remediate application, server and Break fix requests.

**Team Specialization** | PIT/PSP/Non-MIT Customer Support via Remote Troubleshooting.

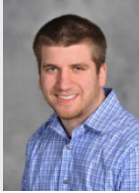
**TEAM LEADERSHIP****Marc Welander | Support Desk Supervisor**

- Industry Experience Since 2017
- B.A.S. Degree in Systems Network Administration

**SUPPORT RESOURCES**

**Dave Bolen | IT Remote Support Engineer**

- Industry Experience Since 2012
- B.S. in Computer Science and Mathematics
- Certifications: Comptia A+, Net+, server+, Linux+, Microsoft MCSA - Office365, HP -Workstation/Laptops/servers/MSA/SAN, Cisco Meraki networking Associate (CMNA)
- Experience: Email, Firewalls, Backups

**Mike Hagstrom | IT Remote Support Engineer**

- Industry Experience Since 2016
- Experience with VMware Applications and Solutions, Microsoft servers, Workstations, Azure and Office 365

**Brendan Ruplin | IT Remote Support Specialist**

- Industry Experience Since 2018
- Certifications: Cisco Networking
- Experience with Barracuda email filtering, Meraki and WatchGuard Firewall, Microsoft Windows server network, VPN, Microsoft operating systems, Webroot, AD, Exchange, Office 365, QuickBooks, Remote desktop services, networking and VMware Virtualization

**Thomas Urness | IT Remote Support Specialist**

- Industry Experience Since 2014
- Associates Degree in Applied Science Information Technology Administration.
- Certifications: Cisco Meraki Network Operator and Cisco Meraki Network Administrator
- Experience with Meraki, Cisco VPN, Marco Cloud and End User Support

**AFTER HOURS SUPPORT DESK**

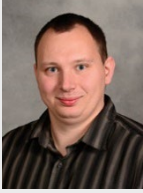
**Service Role** | Remediate application, server and break-fix requests for partially managed and non-managed clients.

**TEAM LEADERSHIP****Tim Vanderhoff | Support Desk Supervisor**

- Industry Experience Since

**SUPPORT RESOURCES****Bob Kelly | Support Desk Specialist**

- Industry Experience Since 1994
- A.A.S. Degree in Networking Technology. A.A.S. Degree in Manufacturing, Drafting and Design
- Certifications: CompTIA A+ Professional
- Experience with Windows workstations, servers, and remote desktop services

**Edward Mathewes | Support Desk Specialist**

- Industry Experience Since 2012
- A.A.S. Degree in Network Administration
- Experience with Microsoft servers, Operating Systems, Exchange Email, Active Directory and desktop Support, HP, Lenovo and Dell PCs/laptops and Cisco switches and routers

**Eric Shiverdecker | Support Desk Specialist**

- Industry Experience Since 1996
- Experience with Active Directory, Exchange, Microsoft Office 365, Anti-Virus/Anti-Malware Solutions, Hyper-V and VMware Virtualization

**Jeff Libov | Support Desk Specialist**

- Industry Experience Since 2017
- B.A. Degree in Marketing
- Experience with Global Virtualization and VMware vRealize Operations Manager System

**Lisandro Resto | Support Desk Specialist**

- Industry Experience Since 2005
- Certifications: CCNA, VCP-DCV 2021
- Experience with Microsoft servers, VMWare Infrastructure and networking, Scripting, Linux and Mac literate

**Robert Bolin | Rapid Resolution Specialist**

- Industry Experience Since 2016
- Experience with Microsoft server 2016, Microsoft Active Directory, Ubiquiti UNIFI, Remote desktop software

**Trevor Hoffman | Support Desk Specialist**

- Industry Experience Since 2001
- B.S. Degree in Computer Science
- Experience with Troubleshooting Credit Card Terminals, Phone Apps, Raid-Storage Systems

## CERTIFIED SOLUTIONS/SYSTEMS ENGINEERS

### Data

#### CORPORATE LEADERSHIP



**Glenn Middlekauff | Chief Service and Automation Officer**

- Industry Experience Since 1990

#### SERVICE LEADERSHIP



**Don DeMeyer | Director of IT Service**

- Industry Experience Since 2002



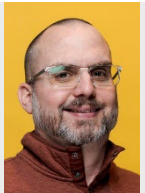
**Jeremy Crozat | Service Manager**

- Industry Experience Since 2010



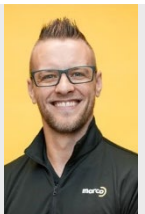
**Jamie Walz | Service Manager**

- Industry Experience Since 2006



**Marc Welander | Service Manager**

- Industry Experience Since 2017



**Tyler Toop | Service Manager**

- Industry Experience Since 2012



**Mike Welling | Solutions Manager**

- Industry Experience Since 1989

**SYSTEMS ENGINEERING**



**Adrian Merfeld | Solutions Engineer**

- Industry Experience Since 2014
- Experience: Client Workstations, Servers, VMware Administration, Hyper-V Administration, Windows Active Directory Administration, Group Policy Administration, Switches, Firewalls
- Specializations: Marco Technology Assessments



**Blaire Lokhorst | Senior Solutions Engineer**

- Industry Experience Since 2010
- Degree in Telecommunications Information Systems
- Certifications: Palo Accredited Sales Executive (ASE) Foundation, Palo Accredited Systems Engineer (PSE) Foundation, Palo Accredited Systems Engineer (PSE) Public Cloud Associate, Palo Accredited Systems Engineer (PSE) Private Cloud Associate, Fortinet NSE 1-3, Meraki CMNA
- Experience: Carrier, Check Point, Palo Alto, Cisco Switching and routing, Cisco Meraki, Cisco Wireless, HP Switches, Velo Cloud SDWAN, Cisco Broadworks Voice



**DJ Eschmann | Solutions Engineer**

- Industry Experience Since 2009
- M.S. Degree in Computer Science
- Experience with Active Directory, Azure, Meraki Networking, Meraki Cameras, Remote and On-Site Technical Support, Server and PC Hardware, Server and PC OS, Microsoft Office, Microsoft/Office 365, Cisco Routing and Switching, ShoreTel VoIP, RingCentral VoIP, VMware, Ubiquiti, Okta, ConnectWise Manage, ConnectWise Automate, VPN, Project Management, Account Management, and Training/Teaching



**Jackson Glanzer | Solutions Engineer**

- Industry Experience Since 2016
- B.S. Degree in Network Administration
- Certified CMNA
- Experience: Meraki, VMware, Microsoft Office 365



**James Helvey | Solutions Engineer**

- Industry Experience Since 2010
- B.S. Degree in Technical Management with Networking
- Experience with: Microsoft 365 administration, including Exchange Online, SharePoint Online, OneDrive for Business, and Teams, planning and executing seamless migrations from on-premises\Google environments to Microsoft 365, Network security best practices, including firewalls, intrusion detection/prevention systems, and access control, Knowledge of Intune's integration with Azure Active Directory (AAD) for identity and access management, Network design, implementation, and maintenance, including LAN, WAN, VPN, and Wireless networks, HPE Dell - Server\Compute - VMWare\Hyper-V\Azure VD, Meraki\Fortinet, M365\DUO\Intune\Proofpoint\Cisco Umbrella



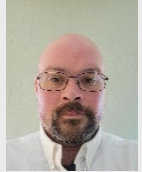
**Jason Twaddle | Solutions Architect**

- Industry Experience Since 2005
- Associates Degree in Computer Networking and Computer Technical Support
- CompTIA A+ Certified, Cisco Certified Network Professional and Certified Design Associate, IBM AS400 Certified, Microsoft Certified Professional and Certified Systems Engineer, Certified Novell Administrator and Certified Xitech Engineer



**Jeffrey Kline | Principal Solutions Architect**

- Industry Experience since 1990
- Masters degree in Information Systems from Dakota State University
- Current and Past Certifications in: VMware, Veeam, Cisco, HPE, Pure Storage, Microsoft, NetApp, and Amazon AWS
- Experience: Designing, implementing, optimizing, and supporting data center compute and storage platforms, virtualization, data center switching, backup platforms, disaster recovery environments, virtual desktop infrastructure (VDI), Microsoft Active Directory, Microsoft Azure, and Amazon AWS.



**Justin Hansen | Solutions Engineer**

- Industry Experience since 2003
- Experience: Citrix, VMware, BMC Monitoring Software, Active Directory, Forcepoint, CrowdStrike, Windows and Microsoft Server OS's, Networking, EMC Storage, Hyper-V, Application Support, PC and Server Hardware Support, Information Security, CrowdStrike, CyberCNS, Umbrella, Perch, and Auvik.



**Kevin Klapperich | Solutions Engineer**

- Industry Experience Since 2001
- Experience: Cisco Routing, Cisco Switches, and Cisco Servers, HPE Servers, Microsoft Windows Servers
- Specializations: Marco Technology Roadmaps, Cisco Customer Experience and Security Risk Assessment Interviews
- Project Focus: Cisco



**Levi Hendricks | Solutions Engineer**

- Industry Experience Since 2014
- Certified: WatchGuard and Meraki
- Experience: Client Workstations, Servers, HPE Hardware and Servers, VMware Administration and Windows VMs/Window Active Directory Administration, Switches and Firewalls



**Matt Mueller | Senior Solutions Engineer**

- Industry Experience Since 1998
- Experience: Deploying F5, Nimble SAN, Windows Servers, Active Directory, SQL Server, IIS, Exchange, HP Servers, HP Switches, VMware, Trend Micro, Citrix, Fortinet, WatchGuard, 3cx, Ecessa, Veritas and Symantec



**Mitch Voightman | Senior Solutions Engineer**

- Industry Experience Since 2006
- A.A.S. Degree in Computer Science
- Certified: CompTIA A+, Nimble Technical Professional, Cisco CBVA and Certified Meraki Network Associate
- Experience: Deploying Nimble, IBM, EMC Storage, Cisco UCS, Cisco MDS, Cisco Route/Switch/Wireless, Cisco, HP ML/DL Servers, Barracuda Backups, Veeam Backup and Replication, VMware vSphere, VMware View, Citrix Xenapp/Xendesktop (45-76) and RSA Security



**Samantha Easterday | Technical Solutions Architect**

- Industry Experience since 2008
- Certified: SIP School Certified Associate
- Experience: Skype for Business servers, AudioCodes and Ribbon session border controllers, Network Support, Active Directory, Microsoft Azure, Microsoft Exchange Servers, Microsoft licensing, VMware, Microsoft Office 365 Administration, VoIP and SIP Trunks



**Shaun Kemp | Solutions Engineer**

- Industry Experience Since 1999
- Certified: Microsoft Certified Professional (MCP), Cisco Meraki CMNA.
- Experience: Security, Automation, Cloud Infrastructure, Local Infrastructure. Specializing in Cisco Networking, Cisco Meraki, SQL, Azure, VMware, Hyper-V, Citrix, Palo Alto Networks, Microsoft Office 365, Windows Server

**SERVICE RESOURCES**



**Alex Howard | Network Specialist**

- Industry Experience Since 2013
- A.A.S. Degree in Information Technology and Computer Programming
- Certifications: Cisco Meraki CMNA Certified, HP ProLiant Server Certified, HP Commercial Desktop/Laptop Certified, Lenovo Desktop/Laptop Certified, VMware VTSP and Toshiba Desktop/Laptop Certified



**Andrew Ladlie | Network Specialist**

- Industry Experience Since 2011
- Certified: Hardware A+, CMNA
- Experience: Workstations, Servers, Switches, VMware, Firewalls, Microsoft Office 365



**Barry Senger | Senior Network Systems Engineer**

- Industry Experience Since 2003
- B.S. Degree in Information Systems
- Certified CCNP, Meraki Networking Associate, CompTIA A+ and HP APP Enterprise Networking – Planning and Design, IBM Systems Expert, Microsoft Systems Engineer and VMware Professional Cisco Unified Computing Support Specialist and EMC Implementation Engineer



**Ben Rutka | Network Specialist**

- Industry Experience Since 2004
- B.S. Degree in Computer Science
- Experience with Cisco Meraki Network Associate, Comptia A+, Comptia Network+ and Comptia Security+



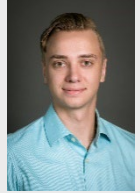
**Bob Hoad | Network Specialist**

- Industry Experience Since 2005
- Certified: Veeam Certified Engineer, CompTIA A+, Server+, Microsoft Certified IT Professional, Microsoft Certified Technology Specialist, WatchGuard Certified Systems Administrator, HPE Certified Professional, Cisco Meraki Certified Networking Associate
- Experience: VMware Virtualization, Microsoft Server platforms, Exchange, Microsoft Office 365, HP servers, Aruba Wireless, Veeam, WatchGuard



**Bob Schroeder | Network Specialist**

- Industry Experience Since 1999
- Certified: CMNA
- Experience: Phones, Audio, Workstation, Servers, Switches



**Bryce Herber | Network Specialist**

- Industry Experience Since 2020
- A.S. Degree in Computer Science
- Certifications: AZ 140 and AZ 700
- Experience: Microsoft Office 365, AD, AAD, Azure, Servers and Virtualization, Networking – Unifi/Ubiquity and Cisco



**Cam Miller | Network Systems Engineer**

- Industry Experience Since 2012
- Barracuda Backup and Meraki Wireless Certified
- Experience: Deploying Microsoft Office 365 and Windows Operating Systems, Cisco Meraki Certified Network Associate, Adaptive Security Appliance, Wireless and Switching, Trend Antivirus, SonicWALL Firewall, HP Procurve, Wireless, PCs/Laptops and Servers, Lenovo PCs/Laptops and IBM Servers



PHOTO  
COMING  
SOON

**Chad Brinkman | Senior Network Systems Engineer**

- Industry Experience Since 1997
- Experience: Deploying and managing Microsoft SQL Servers, Database Administration and Design, Clustering, Integration and Report writing, managing Windows servers, Active Directory, Exchange and Microsoft Office 365 with additional skillsets in Office VBA, Microsoft NET Programming, scripting, multiple vendor Antivirus and Backup Suites as well as WatchGuard and Meraki Firewalls, Hyper-V and VMware



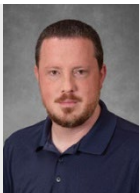
**Chris Ferrell | Network Specialist**

- Industry Experience Since 2019
- Certified CompTia Security+, Network+. Cisco Meraki Network Associate. ITIL Foundations
- Experience in HyperV, Microsoft Office 365, Server Maintenance



**Clinton Kanieski | Network Systems Engineer**

- Industry Experience Since 2006
- M.S. Degree in Technology Management
- Certifications: Meraki Network Associate and CCENT
- Experience with Nimble SAN equipment, Cisco Switches, Access Points and Firewalls, Desktop Support and Networking, HP Servers, Aruba Access Points, HP PCs/Laptops, Lenovo PCs/Laptops, Dell PCs/Laptops, Antivirus and Malware Removal, VMware Virtualization, Microsoft Office, Windows Server Support and Disaster Recovery and Business Continuity



**Dan Rottmann | Network Systems Engineer**

- Industry Experience Since 2006
- Bachelor's Degree in Computer Science. Microsoft Certified Solutions Expert in Server and Messaging. Cisco Meraki Network Associate. Advanced experience deploying HPE/Aruba/Cisco Switches, Servers, Microsoft Exchange, Ubiquiti Wireless, Barracuda and VMware Virtualization (VCP Certification)





**Darin Hokanson | Network Specialist**

- Industry Experience Since 1999
- B.A in Organizational Management and Communications
- Experience: Comptia Network+, Windows PC, Windows Servers and Cisco networks.



**Gwen Adelman | Network Systems Engineer**

- Industry Experience Since 2006
- Experience: Cisco Internal and Partner Side, Customer Relations, Inside Sales, Training.



**Ian Grajciar | Network Specialist**

Industry Experience Since 2005

- A.A.S. Degree in Computer Science
- CompTIA A+, Microsoft Certified Solutions Associate in Server and Certified Meraki Network Associate
- Experience: Cisco ASA, Cisco Switching, Cisco Meraki, Microsoft Exchange, Microsoft Office 365, Workstation Hardware Installation, VMWare Virtualization, Cisco/HP Servers, Spam Filter



**Jamie Leinen | Network Systems Engineer**

- Industry Experience Since 2015
- A.A.S. Degree in Computer Networking Technology
- Certifications: CMNO, CMNA, CCNA with Routing and Switching badge
- Experience: Cisco Network Equipment, Meraki Network Equipment, Aruba Network Equipment, Ubiquiti Network Equipment, Active Directory, Microsoft Azure, Intune, Microsoft AutoPilot, Microsoft Office 365, Windows Remote Desktop Gateway, pfSense firewalls, Windows Operating Systems, Linux Operating Systems and Workstation\laptop repair



**Jason Baggett | Network Specialist**

- Industry Experience Since 2011
- B.S. Degree in Internal Relations
- Experience: Cisco Routing and Switching, Microsoft Server, Active Directory, Exchange, HPE and Dell Servers, VMware, HP and Dell workstations, Microsoft Office 365, and WPPL



**Jason Cook | Senior Network Systems Engineer**

- Industry Experience Since 1999
- A.A.S. Degree in Microcomputer Support and Network Administration
- Experience: LAN & WAN network design, implementation, and troubleshooting including firewall, router, switch, and wireless utilizing solutions from vendors including Cisco, HPE/Aruba, Meraki, Fortinet, Ubiquiti, and Sonicwall



**Jason Erickson | Network Systems Engineer**

- Industry Experience Since 1996
- Certified Cisco Meraki CMNA, Active Directory, Hyper-V, Remote Desktop Protocol and Windows Operating Systems
- Experience: Deploying Cisco Meraki Firewall, Adaptive Security Appliance, Switching and Wireless, Symantec Antivirus, WatchGuard Firewall, HP PCs/Laptops, Switching, Wireless, Servers and Storage and VMware vSphere Virtualization

PHOTO  
COMING  
SOON

**Josiah Barton | Network Specialist**

- Industry Experience Since 2021
- A.A.S. Degree of Sciences in Network and Security Administration
- Experience: VMWare, Windows Servers, DUO, Microsoft Products



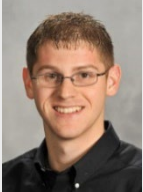
**Justin McCullough | Senior Network Systems Engineer**

- Industry Experience Since 2006
- A.A.S. Degree in Information Systems
- Cisco Unified Computing Systems, EMC Virtual Systems Engineer – Development, Backup and Recovery, HP APP Enterprise Networking - Planning and Design and IBM Certified Specialist – Midrange and High-Volume Storage Fundamentals Experience: deploying VMware



**Ken Patton | Network Specialist**

- Industry Experience Since 2004
- A.S. degree in Computer Systems Specialist
- Certified: CNMA
- Experience: Phones, Audio, Workstation, Servers, Routers & Switches



**Kyle Plantz | Senior Network Systems Engineer**

- Industry Experience Since 2008
- B.S. Degree in Information Technology; Minor in Network Technology: Cisco
- CompTIA A+ and Server+ Certified, Cisco Meraki Certified Network Associate, Microsoft Certified Professional, Certified Technology Specialist and Systems Administrator, VMware Double VCP: Data Center Virtualization and Desktop Mobility, Cisco CCNA, Cisco Certified CyberOps Associate, Cisco Certified Specialist – Security Core and Cisco Certified Specialist – Data Center Operations



**Mark Levendowski | Network Systems Engineer**

- Industry Experience Since 1996
- CompTIA A+ and Security+ Certified, HP ProLiant Servers and Storage Works, Microsoft Certified Professional, Certified Systems Engineer, Certified Technology Specialist and Certified Systems Administrator and Certified Novell Administrator



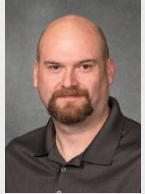
**Matt Moch | Network Systems Engineer**

- Industry Experience Since 2000
- B.S. Degree in Computer Information Systems & Business Administration
- Checkpoint Sandblast Certified Experience: deploying Cisco, Meraki, SonicWall and HP networking and firewalls, Cisco, Meraki, Aruba & UniFi wireless, HP ML/DL Servers Barracuda Backup, Microsoft Servers and Workstations, VMware virtualization, Symantec, Trend, Webroot and Cisco AMP for endpoints



**Mike Nefs | Network Systems Engineer**

- Industry Experience Since 1994
- B.S. and M.S. Degrees in Industrial Technology
- Certified: Barracuda Backup Certified Engineer, Novell Certified Administrator and Certified Engineer, VMware Certified Professional, Cisco Meraki Certified Networking Associate and Unitrends Black Belt Certified - Backup Solutions
- Experience: Servers, Microsoft Windows Operating Systems, Linux Operating System, Microsoft Windows Desktop Operating System, MS SQL, MS Exchange, Microfocus Groupwise, HP Servers and PC's, IBM Servers, Dell Servers, IBM and HP Sans, Meraki Aps, FW's and Switches, Cisco Switches, Unitrends, Barracuda and Veeam Backup Solutions



**Nick Moore | Senior Network Systems Engineer**

- Industry Experience Since 2004
- Certified CCNP Collaboration, CCNA Route/Switch and CCNA Security and Fortinet: NSE 1-4
- Experience: Windows Server and Cisco Wireless Experience: with all things Cisco Voice, WebEx, VMWare



**Patrick Loner | Network Systems Engineer**

- Industry Experience Since 2000
- Microsoft Certified Solutions Associate in Microsoft Office 365, Windows 10, Windows Server 2008, Windows Server 2012, Windows Server 2016 Microsoft Certified Solutions Expert in Exchange 2016 Microsoft Certified IT Professional in Enterprise Messaging Administration, Exchange Configuration Microsoft Certified Technology Specialist with Active Directory and Configuration



**Rick Randgaard | Senior Network Systems Engineer**

- Industry Experience Since 2008
- A.A.S. Degree in Computer Networking
- CompTIA Network+ Certified, Cisco Certified Internetwork Expert, Express Collaboration Systems Engineer, Certified Network Professional, Unified Communication UCS Representative, Unity Support Specialist, Certified Network Associate - Routing, Switching, WebEx Design and Implementation Specialist and Telepresence and Video Field Engineer



**Rob Kirmeier | Senior Network Systems Engineer**

- Industry Experience Since 1999
- B.S. Degree in Computer Networking
- Experience: Professional experience with Microsoft Azure IaaS, Windows Servers, Windows Active Directory, Virtualization, SQL Server, IIS, Switches and Firewalls, Multi-factor authentication



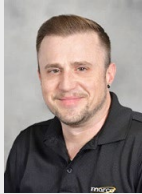
**Robert Lies | Network Systems Engineer**

- Industry Experience Since 2016
- A.A.S. Degree
- Experience: Microsoft Server – AD, DNS, DHCP, GP, WSUS, VMWare vCenter, VMWare View Administration, Meraki Administration, Cisco CCENT – route/switch, Veeam, Sophos and Trend Micro AV, Microsoft Office 365 Administration, Exchange – admin and cloud services, Nimble Administration, NetApp Administration



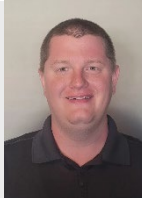
**Ryan Song | Network Systems Architect**

- Industry Experience Since 2012
- B.S. Degree in Computer Science
- Certifications: Cisco Certified Internetwork Expert Routing & Switching, Cisco Certified Internetwork Expert Service Provider, CCNA Routing & Switching, CCNP Routing & Switching, Designing Cisco Enterprise Networks
- Experience with Designing, Implanting, and Troubleshooting Cisco networks which include Cisco routers and switches, Wireless, Firewall (ASA), Meraki Wireless and Switches Aruba serials Switches, and wireless. HP switches. Dell Servers. Field experience with the physical installation of the structure Cabling, Network and Server installation, and Hardware troubleshooting.



**Terry Grohman | Network Specialist**

- Industry Experience Since 1997
- A.A.S. Degree in Computer Science
- Certifications: Meraki CMNA
- Experience with VMware, Windows Server and Operation Systems, Active Directory, Exchange, SharePoint, Hyper-V, Microsoft Office 365, Multiple AV suites, Firewall Appliances, Dell/HP/IBM servers and Desktop/Laptop/Thin Clients



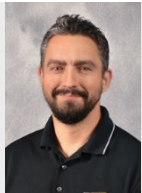
**Steven Hatcher | Network Specialist**

- Industry Experience Since 2013
- Experience: Cisco Switching and Routing, Cisco Wireless, Meraki MX/MS/MR, Windows OS/Server, CrowdStrike AV



**Tom Robillard | Network Systems Engineer**

- Industry Experience Since 1999
- A.A.S. Degree in Network and Systems Administration
- Certifications: CCNA and CWNA



**Tony Pilles | Senior Network Systems Engineer**

- Industry Experience Since 2003
- Cisco Certified Network Associate – Route/Switch, VMware Certified Professional, Meraki Certified Networking Associate and Microsoft Certified Professional
- Experience: Deploying Cisco ASA and Meraki firewalls, Cisco, HP and Meraki switches, Cisco WLC's, Meraki AP's, VMware vSphere, HPE Proliant Servers, Cisco UCS C-Series Servers, Nimble SAN, EMC Unity SAN, HPE MSA SAN, Veeam Backup and Replication






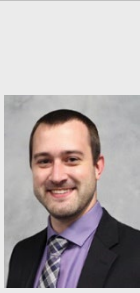

**Vince Parries | Senior Network Systems Engineer**




- Industry Experience Since 1990
- A.A.S. Degree in Electronics
- Cisco Wireless Architecture Certified, Microsoft Certified Technology Specialist and VMware Certified Professional

**Wes Wilson | Network Systems Engineer**

- Industry Experience Since 2002
- B.S. Degree in Information Technology
- Certified CompTIA A+, Network+, and Security+ Certified, Microsoft Certified Systems Engineer Cisco Certified Network Associate – Route and Switch and Cisco Meraki Network Associate, and Fortinet : NSE 1-7
- Experience: Deploying HPE/Aruba Switches, DL Proliant Servers, Microsoft Exchange, Barracuda and VMware Virtualization

## LOCAL ENGINEERS, TECHNICIANS AND SUPPORT SPECIALISTS

WISCONSIN   LEADERSHIP		
	<p><b>Rick Reinholz   Voice Service Manager</b></p> <ul style="list-style-type: none"> <li>Industry Experience Since 1989</li> </ul>	<p><i>Voice</i></p>
	<p><b>Brian Van Cuick   Copier Installation Manager</b></p> <ul style="list-style-type: none"> <li>Industry Experience Since 1987</li> </ul>	<p><i>Copier/ Printer</i></p>
	<p><b>Jeff Huss   Copier Installation Manager</b></p> <ul style="list-style-type: none"> <li>Industry Experience Since 1994</li> </ul>	<p><i>Copier/ Printer</i></p>
LITTLE CHUTE, WI   LOCAL RESOURCES		
	<p><b>Andrew Cummings   Voice Systems Engineer</b></p> <ul style="list-style-type: none"> <li>Industry Experience Since 2017</li> <li>Associates Degree in Network Systems Administration</li> <li>MiVoice Business Core Certification, MiVoice Business Networking, Clustering, and Resiliency Certification, Mitel Standard Linux Certification, MiCollab Certification, MiContact Center and MiVoice Border Gateway Certification</li> <li>Experience with Nupoint Unified Messaging, Cisco and HP switching, PostgreSQL, Powershell, Microsoft Exchange integration, Integrated Directory Services, Active Directory Administration, Wireshark, VMware and Citrix</li> </ul>	<p><i>Voice</i></p>
	<p><b>Anthony Nowak   Rapid Resolution Specialist</b></p> <ul style="list-style-type: none"> <li>Industry Experience Since 2003</li> <li>Experience with Active Directory and Microsoft 365</li> <li>Certifications: CompTIA A+ and CompTIA Network+</li> </ul>	<p><i>Support Desk MIT</i></p>

	<p><b>Bob Karlen   Voice Systems Engineer</b></p> <ul style="list-style-type: none"> <li>• Industry Experience Since 1983</li> <li>• A.A.S. Degree Electronics Technology. A.A.S. Degree Telecommunications</li> <li>• Advanced Technical Certificate – Telecommunications, Cisco Certified Network Associate (CCNA), Certified Convergence Technologies Professional (CTP), CompTIA A+ Certified, MiVoice Business (MiVB) and MiVoice Office (MiVO-250) Platform Certified, Mitel Standard Linux (MSL), Mitel Applications Suite (MAS/MiCollab), Mitel Border Gateway (MBG), Mitel Audio-Web-Video (AWV), VMware VTSP and Inter-Tel Axxess Certified</li> </ul>	<p><i>Voice</i></p>
	<p><b>Brandt Anderson   Copier Refurb Technician</b></p> <ul style="list-style-type: none"> <li>• Industry Experience Since 2000</li> <li>• Certified: ATSP, Sharp Gold SESP and Konica Minolta Outward Associate</li> </ul>	<p><i>Copier/Printer</i></p>
	<p><b>Dan Mikolajczak   Voice Systems Engineer</b></p> <ul style="list-style-type: none"> <li>• Industry Experience Since 1984</li> <li>• Certified Mitel Communications Systems, MiVoice Business and Office Communications Platform, MiCollab Unified Messaging Mitel Boarder Gateway and NuPoint Voice Messaging SX2000's</li> </ul>	<p><i>Voice</i></p>
	<p><b>Dave Christianson   Network Escalation Engineer</b></p> <ul style="list-style-type: none"> <li>• Industry Experience Since 1993</li> <li>• Cisco Certifications: Network Associate - Security, Network Associate - routing and switching, Entry Networking Technician.</li> <li>• Microsoft Certifications: I.T. Professional – 2008r2 Enterprise Administrator, Systems Administrator –server 2008r2, Technology Specialist: Windows server 2008r2 Active Directory, Technology Specialist: Windows server 2008r2 network Infrastructure, Technology Specialist : Windows server 2008r2 Applications Infrastructure, Professional – Windows 7.</li> <li>• Certifications: Wireless Network Administrator, Wireless Technology Specialist</li> <li>• Experience with HPE/Aruba switching, Extreme networks switching and Wireless networking, FortiNet Firewalls, trained in LEAN/5S processes</li> </ul>	<p><i>Managed IT</i></p>

	<p><b>Dave Mattern   Voice Systems Engineer</b></p> <ul style="list-style-type: none"> <li>• Industry Experience Since 1984</li> <li>• Certified Mitel Standard Linux (MSL) inc Virtual Appliance rel 11.0 I+M, MiVoice Business (MCD/3300) rel 9.0 Networking, Clustering and Resiliency Technical Certification, Mitel Phone Manager Release 4.2 System Administration, MiVoice Office Application Suite 6900 Handset Rel 5.2, MiVoice Call Recording/Quality Management 9.2 Technical Certification CompTIA CTP+, Network+, NEC, NEAX, Nortel Norstar, Avaya, AT&amp;T, AT&amp;T Centrex, Bogan, Polycom, Viking Electronics, Valcom, AudioCodes, Comdial, Erickson, Executone, Fujitsu, Iwatsu, ITT, Lucent, Nitsuko, Panasonic, Samsung, Siemens, TIE, Inter-tel Axxess, Tip and Ring, SIP Station/Trunking, Building Cabling Topology, Fiber Optics, ASC Call Recording and Network Topology</li> <li>• Advanced Experience with Sales Engineering, Outside Sales, Data Switch Deployment and Basic Programming, Call Accounting, Tapit, MicroCall, Tel-Electronics and Xiox.</li> </ul>	<p><i>Voice</i></p>
	<p><b>Don Kerscher   Copier Service Technician</b></p> <ul style="list-style-type: none"> <li>• Industry Experience Since 1991</li> <li>• A.A. Degree in Electro-Mechanical Technology</li> <li>• Konica Minolta Pro-Tech Certification (26 years)</li> <li>• Experience servicing Konica Minolta, Risograph, Ricoh, HP, Sharp and Kyocera-Mita</li> </ul>	<p><i>Copier/ Printer</i></p>
	<p><b>Jeff Kuehl   Support Desk Systems Engineer</b></p> <ul style="list-style-type: none"> <li>• Industry Experience Since 2001</li> <li>• B.S. Degree in Business Administration</li> </ul> <p>Certifications: PC/LAN Administrator Certification – Brown Institute, Microsoft Professional, Systems Engineer, Solutions Associate, Novell CAN, CompTIA Security+, A+ Certified</p>	<p><i>Support Desk</i></p>
	<p><b>John Koehler   Copier Service Technician</b></p> <ul style="list-style-type: none"> <li>• Industry Experience Since 1991</li> <li>• Experience servicing KIP, HP, Konica Minolta, Sharp, Lexmark and Fiery</li> </ul>	<p><i>Copier/ Printer</i></p>
	<p><b>Justin Korpala   Network Copier Installer/Trainer</b></p> <ul style="list-style-type: none"> <li>• Industry Experience Since 2006</li> <li>• Certifications: Kyocera Total Document Solutions, Konica Minolta Outward Associate, Konica Minolta Outward Professional</li> <li>• Experience servicing, installing and networking with Kyocera, Mita, HP, Gestetner, Sharp, Samsung, Brother, Okidata, Duplo, Standard Digital Duplicators, Ricoh Digital Duplicators</li> </ul>	<p><i>Copier/ Printer</i></p>
	<p><b>Larry Ahrens   Copier Service Technician</b></p> <ul style="list-style-type: none"> <li>• Industry Experience Since 2014</li> <li>• Experience servicing KIP, HP, Konica Minolta, Sharp, Lexmark and Fiery</li> </ul>	<p><i>Copier/ Printer</i></p>





**Mike Fuge | Voice Systems Engineer**

- Industry Experience Since 1979
- Certified MiVoice Business, Mitel 3300, Mitel SX200, Mitel SX200 ICP, Mitel SX2000, MAS, MCD, MSL, MBG, MiVoice Office 250, Mitel CCNA, Mobile Extension, Audio and, Web Conferencing, Teleworker, Associate Degree Telephony – WITC and Outside Plant

*Voice*



**Paul Borden | Copier Service Technician**

- Industry Experience Since 1989
- Experience servicing HP, Ricoh, Konica Minolta, Samsung and Risograph

*Copier/  
Printer*



**Roger Alcorta | Physical Security Technician**

- Industry Experience Since 1994
- Certifications: Communications-Electronics Installers Course, Certified Samsung Telephone Advanced Networking, Certified Inter-Tel Advance Networking, Certified March Networks Edge Devices, Certified March Networks 8000 Series NVR Initial Setup, Certified Razberi Technologies Training

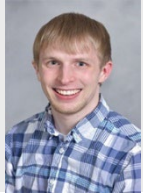
*Physical  
Security*



**Ryan Haws | Support Desk Systems Engineer**

- Industry Experience Since 1996
- Certifications: Microsoft Systems Engineer
- Experience with Windows servers, Exchange, Remote desktop services, Windows Operating systems, Active Directory, networking, VMware Virtualization, website development and website hosting

*Support  
Desk MIT*



**Ryan Miller | Support Desk Specialist**

- Industry Experience Since 2015
- Certifications: CCNA routing and switching, CompTIA A+, CompTIA Security + and Comp TIA Network +

*Support  
Desk MIT*



**Stacy Pantzlaff | Copier Service Technician**

- Industry Experience Since 1990
- Experience servicing KIP, Konica Minolta, Risograph and Samsung

*Copier/  
Printer*



**Todd Triebensee | Copier Service Technician**

- Industry Experience Since 1988
- Experience servicing Ricoh, Risograph, HP and Konica Minolta

*Copier/  
Printer*



**Tom Marifke | Voice Systems Engineer**

- Industry Experience Since 1995
- Associated Degree in Electronics
- Mitel Communications Director (MCD), MiCollab, Mitel Border Gateway (MBG), MiVoice Business, Mitel Standard Linux (MSL), Mobile Extension, NuPoint Unified Messaging, SX-200 ICP, SX-200 EL\ML, SX-2000 LIGHTWARE, Unified Communicator Advanced, Quick Conference, 3300 ICP SpectraLink NetLink, Audio, Web and Video Conferencing, Audio Codes, Enterprise Manager with OPS Manager

*Voice*



**Troy Wilker | Copier Setup Technician**

- Industry Experience Since 2015
- Experience servicing Canon and Sharp
- Certified: HP, Konica Minolta Outward Professional and Sharp Gold

*Copier/  
Printer*

## PROJECT MANAGEMENT TEAM

### TEAM LEADERSHIP



**Glenn Middlekauff | Chief Service and Automation Officer**

- Industry Experience Since 1990



**Brian Larson | Manager of Project Management Office**

- Industry Experience Since 1993
- Associates Degree in Electronics Communications
- Certified: ITIL Foundation
- Experience: IT Management, Project Management, Program Management, Infrastructure (Voice and Data) Design and Implementation
- Enterprise Voice and Data Infrastructure, Cisco Unified Communications/Contact Center Design Focus



**Chaz Cox | Supervisor of Project Management Office**

- Industry Experience Since 2020
- B.S. Degrees in Construction Management, Safety Management and Drafting, Planning & Design
- Certified: PMI- CAPM
- Experience: Project Management and Data Infrastructure
- Data Project and program Management Focus



**Sara Dixson | Manager of Project Management Office**

- Industry Experience Since 1996
- Associates Degree in Layout and Production Art
- Experience: Enterprise Voice and Data Infrastructure with an emphasis on security, WAN design and implementation, UCaaS, Wi-Fi, DDoS, M365, BaaS and Project Management.



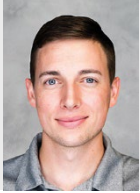
**Jeff Brott | Senior Project Manager**

- Industry Experience Since 1994
- B.A. Degree in Business Administration and Industrial Relations
- Experience: Carrier Services Sales and Project Management, Network, Voice and Data Customer Premises Equipment Installations and ERP Software and Systems Installations
- Voice, Audio Visual, Physical Security and Enterprise Project and Program Management Focused



**Jackie Lommel | PMO Intake Project Manager**

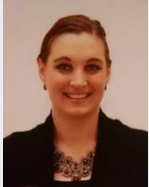
- Industry Experience Since 1991
- A.A.S. Degree in Computer Technology
- PMI Project Management Professional (**PMP Certification**)
- Experience: Managing AV/Physical Security Technology - Board Rooms, Conference Rooms, Paging and Sound Masking, Digital Signage, March Networks Security Surveillance, Cisco Telepresence, IT Infrastructure, Software Development, Hardware and Software Procurement



**Jay Hartmann | Supervisor of Project Management Office**

- Industry Experience Since 2017
- B.S. Degree Construction Project Management
- Experience: Project Management, Process Management, Scheduling Management Managed IT Project Focus

**PROJECT MANAGERS**



**Billi Dale | Data Project Coordinator**

- Industry Experience Since 2022
- Associate of Liberal Arts (A.A. Degree)
- Experience: Project Management, Customer Service, and Account Management



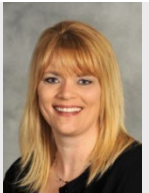
**Brandi Craig | Project Manager**

- Industry Experience Since 2001
- B.S. Business Administration Degree
- CompTIA Security+ Certification
- Experience: Project Management, End User Training, Hardware & Software Support



**Dave Ruddy | Project Manager**

- Industry Experience Since 1982
- Experience: Client Relationship Building, Project Management, Sales and Account Management, Virtual Meetings, Training and Distance Learning, Technical and Administrative Team Development and Training, Audiovisual Design and Integration



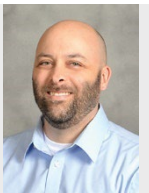
**Dawn Paa | Project Manager**

- Industry Experience Since 1994
- A.A.S. Degree
- Emphasis in Mitel 5000 and 3300 Platforms, Mitel Applications and End User Training
- Experience: Project Management with an emphasis in Mitel on-prem and Cloud based platforms and Cloud-base VAAS. Mitel applications and end user training



**Don Vinge | Project Manager**

- Industry Experience Since 1992
- Experience: Implementation Program/Project Management, Business Process Improvement, Lean Six Sigma, Telecom, VOIP, LAN, WAN, Security, Wireless
- Enterprise Data Infrastructure Project Focus



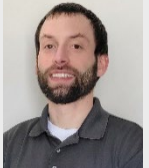
**Eric Karstens | Project Manager**

- Industry Experience Since 2000
- Alexandria Technical and Community College – Computer Programming
- Experience: Project Management, Phone System (Hosted and Physical) Design and Implementation, Infrastructure (Voice and Data) Design and Implementation
- Design, program, install, train on: Cat5 Cat6 and fiber cabling, network gear (firewall, switch, APs), overhead music and paging systems 24V and 70V, cellular enhancement equipment, telco consultation and coordination
- Project Management, Hosted Phone System Design and Implementation Focus



**Garrett Mell | Project Manager**

- Industry Experience Since 2014
- Experience: Project Management, Process Management, and Client Services
- CMIT Project Focus



**Gentry Middendorf | Project Manager**

- Industry Experience Since 2023
- B.A. in Organizational Leadership
- Project Management, Process Management



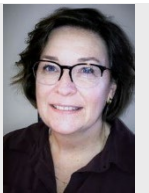
**Joe Clewell | Project Manager**

- Industry Experience Since 2000
- Experience: Cisco, Crestron, Bi Amp, Extron, AMX, Clear One, Polycom and Video Wall Installations



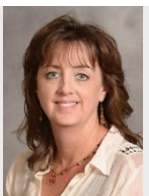
**Joshua Baker | Project Manager**

- Industry Experience Since 2015
- A.A.S. Degree in Computer Systems Technology and B.S. in Information Technology Management
- Experience: Project management, Documentation and Technical Writing, Employee Software and Services Training, Server/Workstation Support, Software Support, Firewall/Networking Support, Service Desk/Support Desk Implementation and Management



**Karen Keys | Project Manager**

- Industry Experience Since 2008
- B.A. Information Management Degree
- Certified Scrum Master (CSM)
- Experience: Project Management, Cisco and Meraki LAN/WAN, Meraki Wireless, and Polycom, Cisco, and Mitel VOIP



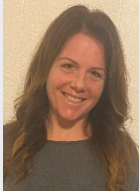
**Kelly McKernan | PMO Intake Project Manager**

- Industry Experience Since 1995
- Experience: Project Management, Product Implementations, Back Office Operations, Data Technologies, Security, End User Training, WAN Services, LAN Support and Support Desk



**Kira Moe | Project Manager**

- Industry Experience Since 2016
- A.A.S. Degree
- Experience: Project Management, Scheduling Coordination, Customer Service, Relationship Management, Data and Voice



**Lacey Kirwin | Project Manager**

- Industry Experience Since 2005
- Experience: Project Planning and Management, Software support, End User Training



**Malik Whit | Project Manager**

- Industry Experience Since 2005
- B.S. Communication Sciences
- Certified Scrum Master (CSM)
- Experience: Project Management



**Pam Reuter | Project Manager**

- Industry Experience Since 1998
- B.A. Degree
- Experience: Project Management, Design and End User Training on the MiVoice Business, MiVoice Office, NuPoint Voicemail, ESNA Voicemail, MiCollab and UCaaS



**Paul Herzberg | Project Manager**

- Industry Experience Since 1978
- Experience: Cisco training, Solutions Sales Training, Cisco Router/LAN/WAN Configuration Network/OSI/TCP/IP, AC/DC Pre-Requisite Training, Microsoft Word 1 & 2, Excel 1 & 2, Access 1, and PowerPoint



**Sarah Warnert | Project Manager**

- Industry Experience Since 2017
- Bachelor of Science in Mass Communications
- Experience: Work Order Coordination, Project Management, Management



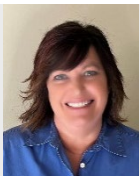
**Shawn Cox | Project Manager**

- Industry Experience Since 2006
- Experience: IT Management, Project Management, and IT Infrastructure (LAN and WAN)
- Data and Enterprise Project Focus



**Stacey Brose | Project Manager**

- Industry Experience Since 1989
- B.A. Degree
- Project Management Certification
- Experience: Project Management, Telephony, End User Training, PBX Systems Design and Carrier Network Design



**Stacey Eustice | Project Manager**

- Industry Experience Since 2010
- Bachelor of Science Degree in Business Administration, Management and Operations
- Certified: SharePoint Administrator, Access Administrator, M-Files Administrator
- Experience: Project Management, Business Analyst, Master Scheduler, Supervisor

**Sue Fonteyn | Project Manager**

- Industry Experience Since 1993
- Experience: Project Management, IT Infrastructure (Voice, LAN and WAN). Traditional and IP Voice design, implementation and support. Ordering and Provisioning Voice and Data services
- Azure Cloud, Data Projects, Enterprise Project deployments Focus, Unify IT, and Project Focus

**Tanya Weets | Project Manager**

- Industry Experience Since 2010
- Web Design Certificate; B.S. in Advertising; B.A. in Fine Arts; and A.A. in Mass Communications
- Certifications: Moz Search Engine Optimization (SEO) Essentials Certification
- Experience: Website Producer/Jr. Developer, SharePoint Web Content Manager, Online Publishing and Digital Media Specialist, SEO Subject Matter Expert (SME), and Web Accessibility Leader
- Managed IT Renewals Project Focus

**Zachary Kelash | Project Manager**

- Industry Experience Since 2006
- Diploma in Electrical Construction
- Certified: PLT Licensed
- Experience: Project Management, Infrastructure (Voice, Data & A/V) Implementation

## MARCO SECURITY TEAM

### CORPORATE LEADERSHIP



#### **Glenn Middlekauff | Chief Service and Automation Officer**

- Industry Experience Since 1990

### TEAM LEADERSHIP



#### **Charles Brandt | Consulting Services Manager (vCIO/vCISO Services)**

- Industry Experience Since 2000
- Bachelor's Degree in Business Management
- Certifications: Cybersecurity Risk Management, Blockchain Applications,
- Experience: High-Availability IT Infrastructure, Network Security, Cybersecurity Remediation, Risk and Impact Analysis, Incident Response Planning, Security Program Development, Cybersecurity Framework Alignment, Executive Team and Board Stakeholder Communication



#### **Eric Anderson | Security Operations Manager**

- Industry Experience Since: 2006
- Bachelor's Computer Science
- Certifications: CISSP, Security+
- Experience with: Incident Response, Security Operations, Threat and Vulnerability Management, Risk Management, Information Security Governance and Compliance



#### **Jay Brown | Cyber Security Manager**

- Industry Experience Since 2014
- BBA in Management Information Systems (MIS)
- Certifications: CISSP, Associate of ISC2, HP Endpoint Security Certified
- Experience: Defense Federal Acquisition Regulations Supplement (DFARS) National Institute of Standards and Technology (NIST) SP 800-171, FFIEC IT Handbook, PCI, GLBA Section 501(b) and HIPAA/Health Information Technology for Economic and Clinical Health (HITECH) compliance reviews



#### **Jennifer Hemmah | Risk Manager**

- Risk and Controls Experience Since 2008
- MBA and BS in Business Economics
- Jennifer previously worked for Archway where she was contracted to work on-site at Microsoft leading the Finance Business Intelligence Controls and Compliance team
- Experience: Over 10 years of experience in design, testing and documentation of SOX, operational and fraud controls

### CYBERSECURITY CONSULTING



#### **Jared Thienes | Client Systems Analyst/Print Security Specialist**

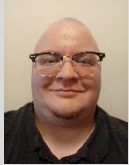
- Industry Experience Since 2021
- BA Management Information Systems (MIS)
- Certifications: Security+
- Experience: An active United States Marine Corps Reserve member with educational background in management information systems and cybersecurity toolsets and compliance standards



**CYBERSECURITY SPECIALISTS**

**Areas of Focus/Specialization**

Incident Response and Forensics, Security Tool Operations, Security Engagements, MIT Client Audit Response, Internal Compliance



**Cameron Bauch | Vulnerability Analyst**

- Industry Experience Since 2022
- Summit Academy Cybersecurity Certification
- Experience: Autopsy, Registry Explorer, KnowBe4, CyberCNS, ConnectWise, and Mosaic



**Don Hoversten | Senior Virtual CIO**

- Industry Experience Since 2017
- BS in Marketing and Management
- Certifications: ITIL Foundation Certified



**Glenn Sweeney | Senior Virtual CISO**

- Industry Experience Since 2004
- A.S. in Electronics Engineering
- Certifications: Information System Security Professional (CISSP) 321505, SANS GIAC Security Essentials (GSEC) 10312, SANS GIAC Certified Incident Handler 26355, Certified HIPAA Security Expert (CHSE), Certified Cybersecurity Awareness Professional (CCAP), EC-Council Computer Hacking Forensic Investigator (CHFI), CompTIA Security+, Microsoft Certified Systems Engineer (MCSE) +Security (Legacy), OCEG GRCP (Certified GRC Professional)



**Nathan Spanier | Security Analyst**

- Industry Experience Since 2019
- BS Degree in Cybersecurity
- Experience: Professional experience with Azure, o365, Meraki and DUO



5

**Sam Glassberg | Security Engineer**

- Industry Experience Since 2018
- AAS in IT/Help Desk/Networking and a AAS in Network Engineering
- Certifications: Linux Pro, Network Pro, Network Security Pro
- Experience: CrowdStrike (EDR), Perch (CW-SIEM), Auvik, Umbrella, ThreatLocker, Meraki, Cisco ASA/Switches, SonicWall, Barracuda, Mimecast, O365, ATP, Exchange, AD, Azure AD, Azure ADFS, MS365, VMWare, Hyper-V, WDS, MDT, Windows Server 2008+, Linux Systems Administration, WatchGuard, CJIS, Emergency IR, RCA, Purple Team, Vulnerability Remediation

**RISK MANAGEMENT SPECIALISTS**

**Areas of Focus/Specialization**

SOC 2 Compliance, Internal Audit, Internal Security Monitoring, Risk Management Program, Vendor Due Diligence



**Ziad Ammouri | Technical Auditor**

- Industry Experience Since 2019
- BS Degree in Cyber Security and Information Assurance
- Certifications: Certifications: ISO/IEC 27001 Information Security Internal Auditor, Associate/ CISSP/ Experience Conditions, CISA ISACA Provisionally passed, AWS Cloud Practitioner, OneTrust: Certified Privacy Professional, Scrum Foundation Professional Certificate - SFPC™, Certified API Penetration Testing, OneTrust: Certified GRC professional, OneTrust: Cookie Consent expert, PMI: Fundamentals of Waterfall Project Management, PMI: Fundamentals of Agile Project Management
- Experience: Information System Audit, Ethical Hacking, Network Security, Digital and Network forensics, Python, SQL, Programming



**Sandi Helm | Risk Analyst**

- Industry Experience Since 2016
- BS Degree in Microbiology
- Experience: Controls Monitoring/Auditing and Program Management

# **Managed IT Support Services**

Simple.  
Secure.  
Better.



## MANAGED IT SERVICES

- 1. MANAGED IT SERVICES .....3
  - A. Desktop/Server Management.....3
  - B. Network Management.....3
  - C. Unlimited Support Desk .....3
  - D. Enhanced End-User Security Training .....4
  - E. Support Desk and Remote Support.....4
  - F. On-site Support .....4
  - G. Server Maintenance and Monitoring.....4
  - H. Security Services .....4
- 2. ADDITIONAL SERVICES AVAILABLE.....5
- 3. TECHNOLOGY AND SECURITY ASSESSMENTS.....5
- 4. DEDICATED SUPPORT TEAM .....6
  - A. Certified Systems Engineers and Technical Representatives.....7
- 5. MANUFACTURER PARTNERSHIPS/CERTIFICATIONS .....7
- 6. IMPLEMENTATION PROCESS.....7
  - A. Implementation Milestones .....8
- 7. REPORTING .....8
  - A. Client Center .....8
  - B. Client Business Reviews ..... 10
  - C. Security/Monitoring ..... 10
- 8. SERVICE/MAINTENANCE ..... 11
  - A. Service Hours ..... 11
  - B. Service Policy/Preventative Maintenance ..... 11
  - C. Response Times ..... 11
  - D. Escalation Process ..... 12
  - E. Service Call Survey ..... 12

## 1. MANAGED IT SERVICES

Marco has provided Managed Services since 2005 and is continually recognized as an elite Managed Service provider. In 2023, Marco was featured in Channel Futures' MSP 500 list in the Elite 150 category, and named a top managed service company by Channel Futures for successfully delivering innovative IT solutions while exceeding customer expectations.



Your organization depends on technology every day to keep your business running smoothly. If you're like most small to mid-sized companies, you have a diverse mix of technologies and computer issues to support.

Marco's Managed IT Services, AmplifyIT, is designed to help support your day-to-day IT maintenance issues and provide end-user assistance, so you can focus on managing your business.

All of Marco's Managed IT Services include remote support from our dedicated Managed Services team and on-site support from over 650 factory-trained, certified systems engineers and technical representatives throughout the nation.

### A. Desktop/Server Management

Through remote software tools, Marco provides unlimited technical assistance to your computer users from our location, which gives you faster response time. We can securely access your desktops and servers to help resolve issues. If an issue cannot be resolved over the phone or remotely, a Marco engineer will be on-site to fix the problem as quickly as possible. We provide:

- Endpoint protection/detection software management
- End user security awareness training
- Security, file sharing and user administration

### B. Network Management

Through remote software tools, Marco can proactively monitor your network environment to detect and resolve any potential network problems. We provide:

- Network maintenance and monitoring
- Monitoring of attached network devices
- Availability, event log, backup and drive space monitoring
- Monthly status reporting
- Network Change monitoring and as-built information for faster troubleshooting and up-to-date network information
- Advanced Automated Documentation



### C. Unlimited Support Desk

Receive unlimited Support Desk support from technical experts who can resolve computer-related issues. We provide support for any question that relates to your organization's networks, PCs and Microsoft applications (i.e., login authentication, connectivity issues and application support).

**D. Enhanced End-User Security Training**

Marco provides security awareness training and tools to help reduce the chance of phishing and ransomware attacks to your organization. This service offers an extensive library of engaging security awareness training content including interactive modules, videos, games, posters and newsletters. With our service, you can find out where your users are in both security knowledge and security culture to help establish baseline security metrics and a security-aware culture.

**E. Support Desk and Remote Support**

- 24x7x365 monitoring of system alerts
- Support Desk support is available Monday - Friday, 7:00 a.m. to 5:00 p.m., excluding Marco's published holidays\* (24x7x365 optional)
- Microsoft 365
- Microsoft OS
- Network Connectivity
- Secure remote system control
- Third party software (requires active support contract)

**F. On-site Support**

On-site support is available Monday - Friday, 8:00 a.m. to 5:00 p.m. (CST), excluding Marco's published holidays\* (for issues that can't be resolved remotely through Marco's Support Desk).

**G. Server Maintenance and Monitoring**

- Asset summary
- Drive space monitoring
- Performance
- Up-time reporting

**H. Security Services**

- Endpoint Detection and Response (EDR)
  - Monitors activities and events on endpoints
  - Provides security teams with visibility to uncover otherwise 'invisible' incidents
  - Detects activity that antivirus solutions miss
- Network monitoring with integrated threat intelligence and backed by a Security Operations Center (SOC)
- Security Information and Event Management (SIEM)
  - Network activity data is collected from critical network points (endpoints, firewalls, and intrusion detection systems)
  - Collected data is forwarded to a central event tracking console
  - Event logs, warnings and alarms are reviewed to defend against cyber attacks
  - A SIEM solution unifies information from a variety of systems so that it can be analyzed and cross-referenced in a single interface
- Automated patch management
  - Microsoft Patches
    - OS critical updates
    - OS security updates
  - Third-party patches
    - Java, Adobe, Google Chrome, etc.



- Content filtering solution
  - Firewall administration
  - User administration
  - Windows file sharing administration
- Multifactor authentication
- Email security
  - Spam filtering
  - Encryption
    - Secures the content of emails from anyone outside of the conversation
    - Extremely secure (256 Bit Encryption)
    - Secures data-in-motion and data-at-rest
    - Includes Data Loss Prevention (automatic encryption)
    - Granular encryption policies
    - Keyword, sender, recipient or domain based
    - Secure replies
  - Spearphishing protection
    - Secures users against targeted attacks that bypass email gateways
    - Application Intelligence based threat detection
  - Email backup and archiving
    - Microsoft Office 365 email backup
    - Enhanced search functionality
    - Electronic Discovery (eDiscovery)
    - Industry standards compliance
    - Automated storage and backup

## 2. ADDITIONAL SERVICES AVAILABLE

- Backup and Disaster Recovery
- Fractional vCIO and vCISO Services
- Cloud Services
- Managed Print
- Audio/Video Conferencing Solutions
- Phone/Collaboration Solutions
- Telecom Carrier Services Consulting
- Marco Technology Assessment (MTA)
- IT Projects
- Technology Procurement
- Enterprise Content Management

## 3. TECHNOLOGY AND SECURITY ASSESSMENTS

Businesses interested in any of the following stand to benefit from a technology assessment:

- Mitigating risk
- Meeting compliance standards
- Optimizing their technology
- Aligning with industry best practices
- Solving security issues

#### 4. DEDICATED SUPPORT TEAM

As part of Marco’s AmplifyIT Services, the following team of experts is dedicated to providing migration and management strategy:

<b>Technology Advisor</b>	Single point of contact dedicated to your account; Interacts with sales engineer and customers to solve business needs and recommend solutions
<b>Technical Account Manager</b>	Interacts with technology advisor and customers to solve business needs and recommend solutions; qualifies and scopes sales opportunities; works with technical escalation point for sales support team; facilitates Client Business Reviews
<b>Sales Manager</b>	MIT subject matter expert, escalation contact for MIT-related issues for customer and major account representative
<b>Sales Director</b>	Manages and escalates pricing, support, post and pre-sales issues, maintains the day to day manufacturer-customer relationship
<b>Solutions Engineer</b>	Consults with clients to budget for subscriptions and support renewals; specializes in providing proactive services and preventative maintenance; serves as a point of contact for strategic account needs, providing technical insight into our depth of expertise and identifying resources for consultation for future technology needs; presents Client Business Reviews
<b>Project Manager</b>	Manages on-boarding (i.e., device discovery, project management, site survey, key staff interviews) and implementation services
<b>Support Desk Supervisor</b>	Leads the support team on IT-related service calls and works to remediate and resolve the issue
<b>Support Desk Team</b>	Technical experts who field service calls, work remotely to remediate and resolve computer-related issues to
<b>Advanced Security Team</b>	Provides oversight, communication and coordination with any reported security concerns between Marco, our client, and any third-party security firms; Coordinates responses to customer security questionnaires as part of audit follow-ups, vulnerability assessments, or other cybersecurity concerns



## A. Certified Systems Engineers and Technical Representatives

Marco has over 650 factory-trained, certified systems engineers and technical representatives who go on-site to serve communities throughout the nation. Customers will have dedicated technicians assigned to them based on geography and machine type. Marco has built solid relationships with its vendors over the past 50 years. We have the product experience, technical expertise and staff to provide the best solution and a successful implementation with ongoing

service/maintenance. Marco's professional certifications can be found on our website at <https://www.marconet.com/about/why-marco/professional-certifications>.



## 5. MANUFACTURER PARTNERSHIPS/CERTIFICATIONS

Marco partners with industry-leading manufacturers who share our commitment to helping our customers connect the right technology to achieve their business goals and exceed their expectations. We maintain the highest levels of professional certifications on the most current technologies. Some of our key partnerships and certifications include the following:

- Barracuda Networks Premier Channel Partner
- Cisco Master Collaboration Specialization
- Cisco Unified Communications Certified
- Cisco/Meraki Gold Certified Partner
- Cohesity Preferred Partner
- CrowdStrike Authorized Partner
- Dell/EMC Gold Partner
- HPE Silver Aruba Networking Partner
- HPE Silver Partner Ready Solution
- Microsoft Gold Partner
- Mitel Platinum Partner
- Veeam Gold Reseller and Service Provider
- VMware Partner Connect, Advanced

## 6. IMPLEMENTATION PROCESS

Standard onboarding timeline is 30-45 days if baseline criteria is met prior to implementation: less than 100 users, single site, existing active directory, and no in-flight data projects. Onboarding timelines will vary based on environment complexity, accuracy of supplied client information and timely client engagement.

## A. Implementation Milestones

<p><b>Project Initiation</b> 1</p> <p><b>Initiate Contact</b> Phone Call</p> <p>A Client Integration Services portfolio analyst will process your project and assign an integration coordinator who will manage the project onboarding. Your dedicated integration coordinator will assign technical resources and schedule a kick-off meeting.</p>	<p><b>Project Kick-Off</b> 2</p> <p><b>Agent Provision &amp; Development</b> Phone Call - Email</p> <p>Your integration coordinator will assign implementation specialists to install remote management and monitoring tools for your organization.</p>	<p><b>Identify Target Audience</b> 3</p> <p><b>Discovery</b> Phone Call</p> <p>During this phase, your Marco team will gather data from your organization through remote network discovery. Once the data is reviewed, your Marco team will offer recommendations and ask for your acceptance of the findings.</p>
<p><b>Services Installation</b> 4</p> <p><b>Add Services</b> Phone Call - On-Site</p> <p>Implementation specialists will install web content filtering, set up security awareness, and install antivirus, email filtering and other services as part of your contract. On-site coordination will be needed for installation of physical appliances such as backup devices.</p>	<p><b>Go-Live</b> 5</p> <p><b>Welcome Call &amp; Go-Live</b> Phone Call - Email</p> <p>Marco will conduct a call about your new Managed Services system. You will review details about Marco's Support Desk. Your services will be fully operational at the "go-live" stage. Full Marco Support Desk services will begin, as well as billing.</p>	<p><b>Support Desk &amp; Health Checks</b> 6</p> <p><b>Cleanup &amp; Closing</b> Phone Call - Email</p> <p>Project team will ensure all services are setup and deployed correctly, buy completing internal audits. The project will close, and you will be charged the implementation fee. Marco's Support Desk will be available to you throughout your contract.</p>

## 7. REPORTING

Marco uses a combination of systems and software tools for reporting, including, but not limited to, Print Aware, e-Automate, our client portal: [portal.marconet.com](https://portal.marconet.com), Client Business Reviews, etc. Customized and ad hoc reporting is provided upon customer request. Our client portal also gives you access to placing service calls, review service tickets, track assets, order from our Marketplace and much more.

### A. Client Center

The following are some examples of the information you will be able to view and request through our Client Center (<https://portal.marconet.com>):

- Submit issues and request tickets
  - Review ticket information and status
  - Escalate tickets
- Capability to purchase O365 licenses and/or track their current allocations
- Reports can be automated and delivered to Point of Contact
- Enhanced reporting features - Easily filtered to display specific data, such as:
  - List of all installed software along with the corresponding devices
  - Lifecycle reports offering insights into upcoming replacements
  - Active Directory reports to verify users have the correct domain accounts
  - Managed IT assessment for all network devices
- Access to Marketplace
  - Create customized personal or company favorite lists for easy, repetitive orders
  - Browse through our online catalog for printers, laptops, accessories, supplies and more
- Roadmap of suggestions to better prepare for future budgets
- Strategic roadmap and planning tool with recommendations for future budgets

## Client Center Dashboards

**Account Team**

Name	Email	Phone Number	Role
Joe Berrigan	joseph.berrigan@marconet.com.invalid	(717) 574-8724	Technology Advisor
Trey Phillips III	trey.phillips@marconet.com.invalid	(570) 279-0467	Enhanced Copier Solutions
Rich Klein	richard.klein@marconet.com.invalid	(717) 203-6085	Production Print Specialist

**Imaging Services**

Ticket Number	Description	Status	Action
SC2306860	PRINTING WITH LITTLE DOTS ON ALL THE PAGES.BEGINNING MO... NEARLY OUT OF INK. (more...)	On Hold	⊙
SC2314491	PROCESSOR DOOR IS NOT CLOSED ERROR MSG WHEN IT ACTU... ALLY IS CLOSED. (M)	Invoiced	⊙
SC2323227	BLACK STREAK DOWN THE PRINTS-CMC	Invoiced	⊙
SC2329529	ISSUES SCANNING TO EMAIL -DW	Invoiced	⊙
SC2320246	The printer will not take the paper from the top tray to scan/Te... K... (more...)	Invoiced	⊙

**Supply Orders**

Order Number	Order Date	Order Status	Action
ORD2485615	10/12/2021 11:35 AM	Fulfilled	⊙
ORD2459845	09/13/2021 02:58 PM	Fulfilled	⊙
ORD2459845	09/13/2021 02:58 PM	Fulfilled	⊙
ORD2372880	06/15/2021 12:16 PM	Fulfilled	⊙
ORD2325086	04/22/2021 11:07 AM	Fulfilled	⊙

**IT Issues/Incidents**

Ticket Number	Title	Status	Action
There are no records to display			

**IT Requests**

Ticket Number	Title	Status	Action
There are no records to display			

**Active Directory**

Users: Total User Count: 482, Privileged User Count: 6, Mac OS: 0, Microsoft OS: 53, Linux OS: 0, Other OS: 0

Active Directory: Total User Count: 482, Domain Controller Status: 25, Domain Controller Types: 25, Number of Privileged Users: 6, Number of Consents: 25, Number of Policies: 3

Type	Title	Created Date	Action
Security and Compliance	Minimum Password Length	05/19/2022	⊙

**Recommendations**

Recommended	Q4, 2022	Q1, 2023	Q2, 2023	Q3, 2023	Completed
<p><b>Security</b></p> <p>Title: RE Active Priority: Critical Estimated Cost: \$1 Per User</p> <p><b>Management</b></p> <p>Title: Asset Type Priority: High Estimated Cost:</p> <p><b>Productivity</b></p> <p>Title: Max Pass Length Priority: High Estimated Cost: \$12,121 Semi Annually Per Device</p> <p><b>Asset and Active Directory Type</b></p> <p>Title: Security Products Priority: Critical Estimated Cost:</p> <p><b>Productivity</b></p> <p>Title: Does not contain recommendation Priority: High Estimated Cost: \$4,545 Each</p> <p><b>Security</b></p> <p>Title: Test Recommendation 123 Priority: Low Estimated Cost:</p>	<p><b>Productivity</b></p> <p>Title: Printers Priority: High Estimated Cost: \$70 Quarterly Per Device</p> <p><b>Security</b></p> <p>Title: RE Active Priority: Critical Estimated Cost: \$1 Per User</p> <p><b>Asset and Active Directory Type</b></p> <p>Title: RE User Priority: Info Estimated Cost:</p> <p><b>Security</b></p> <p>Title: OS Priority: High Estimated Cost:</p> <p><b>Security</b></p> <p>Title: AD Password Change Priority: Critical Estimated Cost: \$11 Per Device</p>				<p><b>Security</b></p> <p>Title: TEST Priority: Low Estimated Cost:</p> <p><b>Security</b></p> <p>Title: RE for Asset OS Version Priority: Medium Estimated Cost: \$225 Per Device</p> <p><b>Security</b></p> <p>Title: and Priority: Info Estimated Cost:</p> <p><b>Productivity</b></p> <p>Title: User Recommendation Priority: Medium Estimated Cost:</p> <p><b>Security</b></p> <p>Title: Test Recommendation Priority: Critical Estimated Cost:</p> <p><b>Security</b></p> <p>Title: Asset Recommendation T Priority: Medium Estimated Cost: \$121,212 Annually Per Device</p>

## B. Client Business Reviews

Marco's Client Business Review (CBR) is an ongoing engagement for providing visibility and recommendations about your IT environment. We will review your business goals to ensure your expectations are met. We will provide technology recommendations for improvements and replacement of technology scheduled for end-of-life.

## C. Security/Monitoring

- Regular Reporting on System Health**

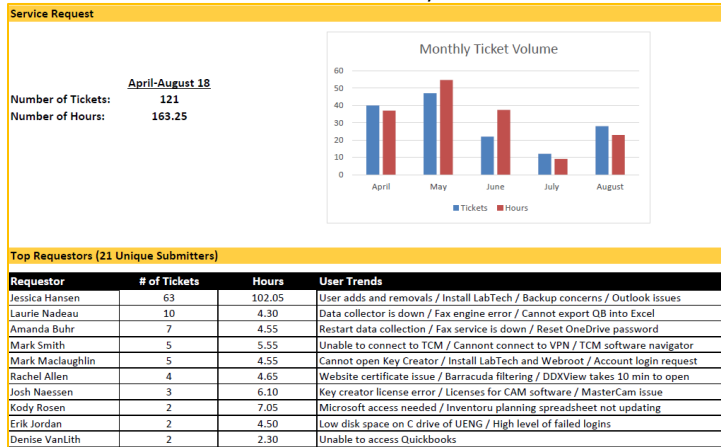
Marco utilizes remote software tools to proactively monitor your network environment and immediately detect, as well as resolve, any potential network problems.

System health metrics are included as part of the regularly scheduled Client Business Review (CBR). In addition, you may also view service ticket history through our client portal: [portal.marconet.com](http://portal.marconet.com) or by contacting our Support Desk at 800.847.3097 for report inquiries.

The following are example reports and service level agreements Marco provides as part of our Managed IT Solution:

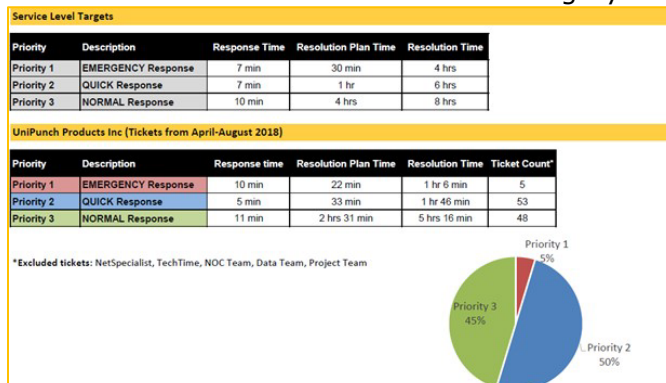
- Marco IT Service Summary Report**

Allows Marco to evaluate call in, issues and common trouble areas.



- Service Level Targets/Service Ticket Report**

Shows the number of tickets in each category.



## 8. SERVICE/MAINTENANCE

To contact Marco's Support Desk, you can email requests to [mit@marconet.com](mailto:mit@marconet.com), use our online service request process through our **client portal** at [portal.marconet.com](https://portal.marconet.com) or call 800.847.3097.

### A. Service Hours

- **Support Desk and Remote Support** is available Monday - Friday, 7:00 a.m. to 5:00 p.m. (CST), excluding Marco's published holidays\*. As an option, 24x7x365 support is also available for an additional cost.
- **On-site Support and Maintenance** is available Monday - Friday, 8:00 a.m. to 5:00 p.m. (CST), excluding Marco's published holidays\* (for issues that can't be resolved remotely through Marco's Support Desk).

\*Marco's published holidays include: New Year's Day, Good Friday (close at 12:00 p.m.), Memorial Day, Independence Day, Labor Day, Thanksgiving Day, Friday after Thanksgiving, Christmas Eve, Christmas Day and New Year's Eve (close at 3:00 p.m.).

### B. Service Policy/Preventative Maintenance

As part of our Support Desk, the Rapid Resolution Team answers your call "live" to help determine the urgency and severity of your request. The Rapid Resolution Team will also work to resolve standard requests and will provide a warm call hand off to your dedicated care team for all other service repairs or in-depth requests. In the rare case that remote support is not enough, an engineering technician will be sent on-site.

When a technician is dispatched on-site, they are trained to complete the service call, including any preventative maintenance not isolated to the service in question.



### C. Response Times

As part of our Support Desk, the Triage Team answers your call "live" to help determine the urgency and severity of your request. The Triage Team will also work to resolve standard requests and provide a hand off to a dedicated skillset Specialist or Escalation Engineer for all other service repairs or in-depth requests. In the rare case that remote support is not enough, a technician or engineer will be sent on-site.

On occasion, there might be situations where our standard service protocols do not meet your specific needs. During such infrequent instances, we request that you utilize the Marco portal at [portal.marconet.com](https://portal.marconet.com) to escalate your request.

**Service Level Targets**

PRIORITY	RESPONSE TIME	EXAMPLES
1	1 HOUR	<ul style="list-style-type: none"> <li>• Server or system outage causing a significant business impact</li> <li>• Cyber security events that are actively compromising systems or data</li> <li>• Data loss or corruption</li> <li>• Major application failure with no workaround</li> </ul>
2	4 HOURS	<ul style="list-style-type: none"> <li>• Unable to access critical business applications or data</li> <li>• Performance degradation of systems causing significant business impact</li> <li>• Cyber security events that have the potential to compromise systems or data</li> <li>• Workstation or laptop hardware failure affecting productivity</li> </ul>
3	NEXT DAY	<ul style="list-style-type: none"> <li>• Non-critical business applications or services are unavailable or degraded</li> <li>• Printer or peripheral device failure</li> <li>• Account access or credential issues for non-critical accounts</li> </ul>
4	ONE WEEK	<ul style="list-style-type: none"> <li>• Non-urgent issues with device or applications</li> <li>• Requests for new hardware or software installations</li> <li>• New account creations</li> <li>• General how-to or requests for information</li> </ul>

We currently have a 95% live call answer average for support calls. We receive over 18,100 phone calls/month through our Support Desk.

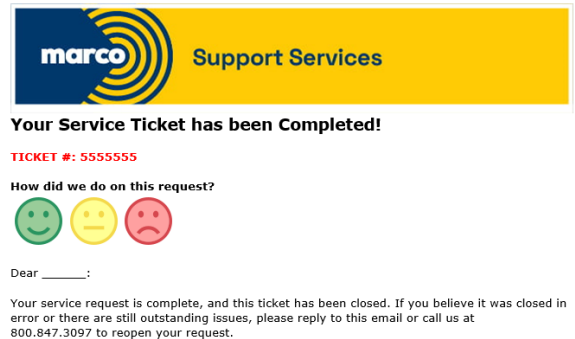
**D. Escalation Process**

Marco’s Managed IT ticket escalation process is:

1. Rapid Resolution Team
2. Color Care Team
  - o Tier 1
  - o Tier 2
3. Team Supervisor
4. Advanced Security Team/Advanced Network Team
5. Field Tech Services Team

**E. Service Call Survey**

Feedback is very important to Marco and the information received from our customers is used to resolve any issues, make improvements and enhance our support services. After each service ticket is closed, a follow-up survey is emailed to the end user. Marco’s Care Team supervisor reviews the survey results and contacts customers who provided a neutral or negative response. Marco’s Managed IT service call survey has a positive average rating of 94.9% for the past 12 months.





## APPENDICES

- a. Terms and Conditions
- b. AmplifyIT Agreement Sample
- c. Relationship Agreement Sample



## TERMS AND CONDITIONS

Marco's standard terms and conditions can be found here: [www.marconet.com/legal](http://www.marconet.com/legal). Terms can be negotiated upon notification of award.

The following are Marco's standard payments terms:

- Our standard payment term is Net 15 days.
- Upon award, a completed and signed credit application is required for formal credit approval.
- Marco's preferred invoice delivery method is via email.
- A 3% credit card fee may apply.
- Marco accepts payments via EFT/ACH, contact [AR@marconet.com](mailto:AR@marconet.com) for remittance information.



## MARCO AmplifyIT PRODUCT AGREEMENT

This AmplifyIT Product Agreement ("AmplifyIT Agreement") is entered into by and between Marco Technologies, LLC ("Marco") and \_\_\_\_\_ ("Client") for the services ("Services"), equipment (collectively, "Equipment"), and software ("Software"), (collectively, "Products") that Marco will provide. This AmplifyIT Agreement is made and entered into pursuant and subject to the terms and conditions of the Marco Relationship Agreement ("Agreement") between Marco and Client and the Parties agree to be bound by its terms. Defined terms in the Agreement have the same meaning in this AmplifyIT Agreement unless otherwise expressly stated.

As used in this Agreement,

1. "Agreement" means, the Marco Relationship Agreement between Marco and Client (each as defined below);
2. "AmplifyIT Agreement" means, this contract between Marco and Client for AmplifyIT;
3. "AmplifyIT Agreement Term" means, the term of the AmplifyIT Agreement which shall commence upon Client signature on any SOP (as defined below) through the completion of the SOP Term (as defined below);
4. "AmplifyIT Feature" means, a feature that is included in the product subject to the AmplifyIT Agreement (including security);
5. "Assessment" means, the process used by Marco to ensure all Client technology proposed to be under management meets Marco's Minimum Specifications (as defined below);
6. "Asset Summary" means, the list of all Designated Equipment (as defined below);
7. "Client" means, the party specified in the first paragraph of the AmplifyIT Agreement;
8. "Client Access Information" means, as those rights, privileges and authorizations, Marco requires for it to carry out its obligations or exercise its rights under the Agreement and this AmplifyIT Agreement, both during and after Client's regular business hours, including but not limited to: administrative rights, passwords, security clearance, facilities entrance capabilities and Network Credentials (as defined below);
9. "Client Equipment" means, any computers, equipment, systems, cabling, or facilities provided or otherwise owned by Client and used directly or indirectly in the provision of the Services;
10. "Client Information and Access" means, Client's additional information, which Marco reasonably requests, including but not limited to: information about facilities, computers, network environment, servers, drives, switches, routers, hard drives, mobile devices, Third Party Applications (as defined below), licenses (and their renewal), backup and protocol (including for emergencies), goods, equipment, etc.;
11. "Contacts" means, collectively, Client's project manager and IT administrator;
12. "Designated Equipment" means, any Equipment (as defined below) on which Marco has monitoring capabilities and meets Marco's minimum equipment and software specifications;
13. "Designated Site" or "Designated Sites" means, the physical location(s) where Marco will perform any on-site work as specified on the SOP;
14. "Designated User" or "Designated Users" means, Client employee(s) and other designee(s) who are users of Support Desk Services (as defined below);
15. "Equipment" means, any computers, equipment, systems, cabling, or facilities and used directly or indirectly in the provision of Services (as defined below);
16. "Existing Provider Cutover" means, the date existing services, equipment, and software of another provider transitions to Marco Services, Equipment, or Service;
17. "Go Live Date" means, the date designated by Marco when all Products (as defined below) specified in the SOP are available to Client's Designated Users';

18. "Implementation Fee" means, the fee charged by Marco for Services provided before the Go Live Date;
19. "Managed Backup" means, a specific Service provided by Marco when specified on an SOP;
20. "Marco" means, Marco Technologies, LLC;
21. "Marco Service Catalog" means, the list of Services provided by Marco and found [here](https://www.marconet.com/legal/amplifyit-service-catalog) (<https://www.marconet.com/legal/amplifyit-service-catalog>);
22. "Marco's Password Standard" means, the minimum requirements for Client password security as detailed [here](https://www.marconet.com/legal) (<https://www.marconet.com/legal>);
23. "Minimum Specifications" means, the minimum environmental, password, and other standards necessary for Client to meet in order for Marco to provide Services;
24. "Monthly Recurring Charge" means, the amount per month charged to Client for Products as specified in an SOP;
25. "Network Credentials" means, access to certain network appliances as further described in the AmplifyIT Agreement and/or SOP;
26. "Network Discovery" means, the process of discovery of Client's Equipment, operating systems, software and network environment necessary for Marco to provide Services;
27. "Price Increase" means, the amount the Price (as defined below) rises annually as more further described in the AmplifyIT Agreement and/or SOP;
28. "Price(s)" means, the amount charged by Marco for the Products purchased or Services provided.
29. "Products" means, the software and equipment purchased by Client under a valid SOP;
30. "Project Manager" means, the Marco employee assigned to the AmplifyIT Services implementation;
31. "Remediation Plan" means, out of scope Services required for Client to meet the Minimum Standards;
32. "Remote Access Software" means, software used by Marco in order to provide End User Support Desk Services remotely;
33. "Representatives" means, the directors, officers, employees, consultants, financial advisors, counsel, accountants and other agents of a party;
34. "Service Limitations" means, limitations or exclusions to the Services as determined by Marco;
35. "Services" means, certain IT services provided by Marco as particularly described in a valid SOP;
36. "Software" means, software applications or software as a service provided by or resold by Marco and listed in the SOP.;
37. "Schedule of Products" or "SOP" means, the Schedule or Schedules attached to this AmplifyIT Agreement which lists the Products and Services purchased by Client from Marco;
38. "Schedules" means, collectively, the attached document(s) containing SOP and/or other information, each of which are incorporated herein by reference;
39. "Product Effective Date" means, the commencement date of the SOP as further described in the SOP;
40. "SOP Renewal Term" means, the additional term that commences upon the expiration of the SOP Term (as defined below);
41. "SOP Term" means, the period commencing upon the SOP Effective Date until such time as described in the SOP;
42. "Support Desk Services" means, a certain Service provided by Marco that assists Designated Users with routine problem solving and requests for information as more particularly described in Schedule B;
43. "T&M" means, Services charged to Client on a time and materials basis;
44. "Termination Fee" means, the fee charged by Marco for early termination of a SOP;
45. "Third Party Applications" means, software developed by a third party and used by Client in its business.

## DESCRIPTION OF SERVICES AND DELIVERABLES

- 1) Products.** Subject to the terms herein, Marco will provide, and Client will purchase, lease or license, as applicable, Products as described in the attached Schedules, which are incorporated herein by reference. All available Marco services are listed and described in the Marco Service Catalog located at: <https://www.marconet.com/legal/amplifyit-service-catalog>

Client shall pay the Price(s) listed on Marco's SOP for the Products. Any Products not listed on the SOP are not included in the fees therein and will not be delivered under this Agreement. Marco shall have the right to implement a Price increase which may include an increase to the Price(s) to Client in its sole discretion at the end of the first twelve (12) months of the Product Effective Date and once each twelve (12) months thereafter, by up to ten percent (10%). Client's monthly recurring billing as provided in the SOP commences on the Go Live Date (defined below). Client will be invoiced an Implementation Fee, which shall be paid within thirty (30) days of the date this AmplifyIT Agreement is signed. Any other one-time fees set forth in the SOP are due upon the Go Live Date.

- 2) Initial Client Network Scan.** Prior to the delivery of Services under this Agreement, Marco will perform a Network Scan. Client will be notified of any technology not meeting Marco's requirements and will be provided with the opportunity to acquire the necessary technology to meet Marco requirements. If client fails to purchase necessary technology (including software updates) as requested by Marco, Marco may, at its option, reprice this Agreement, terminate this Agreement, or limit the scope of its coverage. In the event Client is not in agreement with such changes, Client may terminate this Agreement.

- 3) Designated Site(s).** Marco will list the Designated Site(s) on the SOP. If Client's physical location changes from what is stated in the SOP, or a physical location is added, Client must notify Marco in writing and Marco will determine if a change order is necessary.

- 4) Designated Users.** Prior to Marco's installation of Remote Access Software, Client shall list the Designated Users allotted on the SOP. Client shall allow only its Designated Users to access the Support Desk Services and Marco is not obligated to support non-Designated Users. Client shall notify Marco of any changes to the Designated Users. The allotted Designated Users defined in the SOP will be the minimum Price. If Client exceeds its allotted Designated Users, the Price will be increased accordingly.

Designated User(s) are all users that exist in the Client's central authentication directory (e.g., Active Directory, Azure Active Directory, etc.). In the event a Client network user account is shared by more than one user, Marco reserves the right to bill for each user who uses that shared network user account.

- 5) Audit Rights.** Marco shall have the right to take all reasonable action it deems appropriate in its sole discretion to audit Designated Users, the classification and status of all users that exist in the Client's central identity and access management system, and Client's use of the Products at such times as Marco reasonably requests. Client shall cooperate in and provide Marco all Client Information and Access Marco deems necessary to carry out such audit. Marco shall have the right to take all reasonable action it deems appropriate in its sole discretion to audit Designated Equipment and Designated Users' status, user type, and use of the Products at such times as Marco reasonably requests. If Client exceeds its allotted Designated Users or software licenses or Marco finds that the user type has not been accurately designated or has changed, the Price will be increased accordingly.

- 6) Primary Point of Contact.** Client shall designate a Primary Point of Contact upon onboarding who shall act as the authority on behalf of the client. This user may delegate their authority. Client may change the Primary Point of Contact by providing written notice to Marco.
- 7) Client Changes.** Client shall notify Marco of any changes to their Designated Equipment or Designated Users not performed by Marco, including equipment decommissioning, installation, or replacement or in the case that a Primary Point of Contact or member with delegated authority has an employment change that revokes the authority to make decisions on behalf of Client and this AmplifyIT agreement. If a change is made to Client's environment by Client or a third party, Marco must be made aware of such change; if Marco is not notified of such change, Marco is not responsible for providing Services on the changed items.
- 8) Designated Equipment.** For the purposes of this AmplifyIT Agreement, Designated Equipment is defined as any Equipment on which Marco has monitoring capabilities and meets the standards as stated in the Service Catalog. Marco and Client will compile the Asset Summary. Client shall promptly review the Asset Summary and report any missing equipment or inaccuracies. Client acknowledges that Marco will be delayed in, or unable to, effectively and efficiently provide the Products without a complete and accurate Asset Summary and agrees that Marco shall have no liability to Client or any third party arising out of such delay.
- 9) Term, Termination, and Renewals.**
- a) Unless terminated earlier as provided in the Agreement or in Sub-Section c. below, this AmplifyIT Agreement Term shall automatically renew for successive twelve (12) month periods unless either Party provides written notice of its intent not to renew at least seventy-five (75) days prior to the end of the then-current term. This AmplifyIT Agreement shall remain active as long as there is an active SOP between Marco and Client
  - b) Unless terminated earlier as provided in the Agreement or this AmplifyIT Agreement under Sub-Section d. below, each SOP shall be in effect as of the Go Live Date defined below and shall continue for the term stated in each SOP for Products purchased ("SOP Term"). Each SOP shall automatically renew for successive twelve (12) month periods ("SOP Renewal Term") at then applicable rates which are subject to change in Marco's sole discretion, unless either Party provides written notice of its intent not to renew at least thirty (30) days prior to the end of the then-current SOP Term or Renewal Term.

Client is purchasing the Products for the complete contract term designated in the SOP. Client may terminate any SOP after providing thirty (30) days' written notice to Marco. In the event Client terminates a SOP prior to the end of the then current SOP term, unless otherwise stated herein, Client will pay Marco a Termination Fee equal to the Monthly Recurring Charge, multiplied by the number of months remaining in the SOP Term or SOP Renewal Term and any professional service, on boarding, off boarding, or other applicable fees. Client shall pay Marco's invoice containing the Termination Fee and any other fees within thirty (30) days of the date of the invoice. Notice of termination under this subsection shall be provided as set forth in the Agreement. Payment of the Termination Fee is not a penalty assessed to the Client for canceling the SOP before the end of the term and shall be paid as liquidated damages to Marco as actual damages may be hard to determine.

## PLANNING, IMPLEMENTATION AND CHANGES

- 1) Project Contacts.** Marco's Project Manager will interface with Client's Primary Point of Contact, who has full authority to approve changes this AmplifyIT Agreement. Client shall also designate a primary and secondary IT administrator who shall be competent to, and shall have full authority to, dictate Client's network policy and make all technical decisions for Client concerning the provision and use of the Products. One of Client's IT Administrators may also serve as its project manager if Client so designates. Client represents and warrants that its Contacts have full authority to bind Client, and that Marco may rely on the Contacts, and their decisions, instructions and directions in carrying out this AmplifyIT Agreement.
- 2) Client Information and Access.** To facilitate the efficient and effective provision and use of the Products, Client agrees to provide to Marco at Client's expense copies of, access to, and permission to collect, maintain, process, use and enter, as applicable:
- a) Client's Designated Site; Designated Equipment; Client Equipment; the Equipment; hardware or facilities of any other kind which Marco reasonably requests;
  - b) Client Designated Users' names, phone numbers, and email addresses;
  - c) Client Contacts and other Representatives;
  - d) Client Access Information;
  - e) Marco named administrative service accounts to Designated Equipment; if not possible, we will assist client in order to set-up client service accounts;
  - f) Client Information and Access; and
  - g) If physical access to Client Equipment is controlled by a third party, then Client shall pay for Marco's time at then prevailing rates (including travel time) and any fees relating to such access, including fees associated with such things as finger printing, photographs, and background checks.
- 3) Remediation and Service Limitations.** Marco may designate certain Service Limitations, including those on Schedule E, or require that Client enter into a separate remediation agreement or otherwise abide a Remediation Plan if: (i) on the Effective Date the Client's environment is not up to Marco's minimum standards; or (ii) during Network Discovery, or at any other time during the AmplifyIT Agreement, Marco determines that upgrading, replacement or other remediation by Client will be required in order for Marco to efficiently and effectively provide and Client and its Representatives to use the Products. Client shall pay Marco's then prevailing rates for any remediation services.

If Minimum Specifications are not met or if Client elects not to implement a product or feature that is included in the AmplifyIT Agreement (including for security) ("AmplifyIT Feature"), Client shall be responsible for and shall pay Marco's prevailing rates for any services Marco performs, including incident response or remediation, that Marco determines in its sole discretion resulted from (i) the failure to meet Minimum Specifications or implement AmplifyIT Feature(s) or (ii) the support of feature(s) Client has elected to use in lieu of the AmplifyIT Feature(s).

If (i) Minimum Specifications are not met; (ii) Client fails to implement a AmplifyIT Feature or a Remediation Plan; or (iii) Marco determines in its sole discretion that the Service Limitations would prohibit Marco from efficiently and effectively providing the Products, Marco may terminate this AmplifyIT Agreement without liability. If Marco terminates on the above basis, Client shall pay all fees incurred to the date of such termination, including the Implementation Fee.

Marco's assistance in any audit or other investigation (e.g., computer forensics) initiated by or on behalf of Client or any third party, including any response to a security incident, is billable at Marco's prevailing

rates.

Client will receive a formalized version of the Schedule E, as referenced below, from which the Client shall be responsible to implement the items listed on the Schedule E, or elect to select the risk, within the time frame designated in the Schedule E.

- 4) Planning and Schedule.** Client shall cooperate with Marco to plan for and schedule dates and times for all steps leading to the Go Live Date, including but not limited to: the Network Scan, the provision of any Client Information and Access, any Existing Provider Cutover, the Go Live Date and all other on boarding.
- 5) Cutover from Existing Provider.** To the extent the Services, Equipment or Software will be replacing existing services, equipment and software of another provider, Marco will assist Client with the transition by providing service continuation guidelines and an Existing Provider Cutover. Client acknowledges and agrees that factors relating to Client's existing provider, which are not in the reasonable control of Marco, may limit the effectiveness of the Existing Provider Cutover. Client agrees that Marco shall have no liability to Client or any third party arising out of such factors, and all work performed by Marco pursuant to this section will be invoiced at Marco's T&M rates.
- 6) Go Live.** Marco will notify Client of the Go Live date when all Products specified in the SOP are available to Client's Designated Users. Marco will host a welcome call and provide Client and the Primary Point of Contact with information needed for Designated Users to access Marco Support Desk Services. Marco's obligation to deliver Products as specified in the SOP and this AmplifyIT Agreement does not begin until the Go Live Date. Prior to the Go Live Date, Marco will be in the Product implementation process, which means (a) the Products will not be active, (b) the SOP Term will not begin, and (c) the specific terms in this AmplifyIT Agreement pertaining to the inactive Products shall not yet be enforceable. Failure of the Client or the Designated User to engage with Marco effectively and efficiently, including but not limited to failing to provide required access and information, to the extent that impedes or delays the Go Live Date by more than sixty (60) days after the date the SOP is signed, may lead to all or any of the following, at Marco's discretion, regardless of the status of Product implementation: a start of billing for the Products; additional fees; the beginning of the AmplifyIT Agreement Term; termination of this AmplifyIT Agreement.
- 7) Discovery Scope.** The Network Scan, Remediation Plan and Service Limitations are not to be considered a comprehensive analysis, but rather are the limited discovery of Client's network environment for purposes of Marco's efficient and effective provision of the Products under this AmplifyIT Agreement. Client represents and warrants that it and its Representatives shall not rely on nor allow any third party to rely on such assessment for any other purpose.
- 8) Equipment and Site Prerequisites.** The Equipment, if any, is identified on the SOP. Client shall place the Equipment in a suitable environment to maintain it in good working order in order for Marco to provide Services. Prior to Marco's installation of any Equipment and thereafter, as required for Marco's effective and efficient provision of the Products, Client shall:
  - a) Specify the location for any installation;
  - b) Prepare the installation site in accordance with Marco's installation instructions and applicable environmental, health and safety regulations;
  - c) Provide adequate: space for the equipment, network or communication cable as required by Marco; light, separate AC power sources, ventilation and other equipment or items necessary for the efficient and effective installation, operation and use of the Products; and

d) Take such other action as is necessary or reasonably requested by Marco to prepare and maintain the site and environment for the effective and efficient provision of the products.

**9) Software License Terms** In accordance with the Agreement, Client understands and agrees that it is required to comply with the then current version or applicable License terms for the Software (including for Managed Backup) and/or AmplifyIT Feature(s) which (i) are located at [Subscription and License Product Agreements](#) and (ii) are otherwise applicable to any Software and/or AmplifyIT Feature.

**10) Out-of-Scope Issues.** Upon request of Client, Marco may provide services that are outside the scope of this AmplifyIT Agreement on a Time & Materials ("T&M") basis. T&M is a method of engaging Marco that allows Client to utilize a variety of Marco technical resources on an as-needed basis. With a T&M engagement, Client is not purchasing a fixed set of deliverables, but instead is purchasing time on an as-used basis. The work performed during the resource's time is governed by to the expressed requirements of Client, and Marco makes no warranty or guarantees with respect to the T&M Services. All actual hours used by the Client will be billed according to Marco's then current rate pursuant to your FSP, if applicable. For items that are specifically covered under contract please refer to the Marco Service Catalog.

**11) Changes and Enhanced Services.** Except as expressly stated otherwise herein or in the Agreement, no order, statement, conduct of either Party, nor course of dealing, usage, or trade practice shall be treated as a change to the obligations or rights of either Party hereunder or in the Agreement, unless agreed in a writing by both Parties. The Parties' agreement to change this AmplifyIT Agreement shall be set forth in an amendment hereto and/or an updated SOP signed by the Parties.

## CLIENT RESPONSIBILITIES

Once the Agreement, this AmplifyIT Agreement, the SOP, and other related agreements, if any, are received fully executed, Marco will assign a Project Manager to work on the AmplifyIT Services implementation. The implementation and activation of the Go Live Date will require assistance from Client needed to complete and maintain the Network Information. Such assistance includes the items listed below. All information requested and communication should be routed to the Project Manager assigned.

**1) Network Credentials.** Client will provide documentation of Network Credentials Marco's Project Manager prior to the start of the AmplifyIT Services implementation.

2. Client agrees to actively assist and cooperate with Marco to perform its obligations and exercise its rights under the Agreement and this AmplifyIT Agreement, including, but not limited to: actively participating in the planning, scheduling, information gathering, monitoring, maintaining, managing, providing feedback, considering recommendations (including as to single point failures) and implementing remediation or changes for the effective and efficient provision and use of the Products.

Migrating Client's Products gracefully to a new provider or internal support requires a great deal of planning. Planning and executing the migration is the responsibility of Client and/or Client's new IT provider and not Marco. Marco will provide assistance as requested to answer questions, and transition access to key systems. All assistance provided by Marco will be invoiced at its then current T&M rates. All migration costs, including any remaining licensing subscription fees, any migration assistance provided by Marco and any costs incurred by Marco for and during the

migration away from its Products will be invoiced at Marco’s then-current T&M rates. Marco may require payment prior to providing services, licensing or products. Marco will not be responsible for any support, maintenance, or management of any systems after control and or administrative access is delivered to Client.

IN WITNESS WHEREOF, the parties have each caused this AmplifyIT Agreement to be signed and delivered by its duly authorized officer or representative on the date set forth below.

**Marco Technologies, LLC**

**[Client Name]**

Signature:

Signature:

\_\_\_\_\_  
Name:

\_\_\_\_\_  
Name:

\_\_\_\_\_  
Title:

\_\_\_\_\_  
Title:

\_\_\_\_\_  
Date:

\_\_\_\_\_  
Date:

Version: 1.0



## MARCO TECHNOLOGIES RELATIONSHIP AGREEMENT

THIS MARCO TECHNOLOGIES RELATIONSHIP AGREEMENT ("Agreement") is entered into as of the date the Parties first process a Product Agreement or the Client places an order under this Agreement, whichever is earlier (the "**Effective Date**") by and between **MARCO TECHNOLOGIES, LLC** with a principal place of business at **4510 HEATHERWOOD ROAD, ST. CLOUD, MN** ("**Marco**") and the legal entity identified in any order ("**Client**") (individually, a "**Party**," and collectively, "**Parties**").

This Agreement governs Marco's relationship with Client for the provision of Products as further described in Product Agreements between the Parties. Marco rejects any terms and conditions contained in Client's forms that are additional to or different from as set forth in Marco's Product Agreements or in this Relationship Agreement. This Agreement is incorporated by reference and made part of any Product Agreement between the Parties. In the event of an express conflict between or among the provisions of this Agreement and any Product Agreement, the inconsistency shall be resolved by giving precedence in the following order: (1) This Agreement; and (2) the Product Agreement. Notwithstanding the above, the Parties may specify in the applicable Product Agreement that a particular provision of the Product Agreement supersedes a provision of this Agreement. Any such modification to a Product Agreement shall be effective only if the specific modified section of the Product Agreement expressly references the applicable section of this Agreement that is to be modified and clearly states that such modification supersedes the conflicting or inconsistent provision in this Agreement.

- 1. Definitions.** In addition to any terms defined elsewhere in this Agreement, the following terms shall, when capitalized, have the meanings given to them in this **Definitions** Section.
  - 1.1 "Affiliate"** means any entity, individual, firm, or corporation, directly or indirectly, through one or more intermediaries, controlling, controlled by, or under common control with a Party.
  - 1.2 "Applicable Privacy Law"** means, any law regarding the privacy and/or protection of personal data of any individual.
  - 1.3 "Client Materials"** means, collectively, parts, materials, equipment, hardware computers, software, software-as-a-service, cloud services, data, databases, datafeeds, operating systems, switches, routers, drives, firewalls, databases, backup systems, networks, internet connectivity, information and other items and services owned by Client, or provided by a third party to Client, that are used for the provision or use of the Products and/or necessary for Marco to perform all of its obligations as set forth in this Agreement.
  - 1.4 "Client Data"** means all data and information about Client's business that Marco obtains, creates, generates, collects, or processes in connection with its performance of the Products.
  - 1.5 "Confidential Information"** means any and all information furnished or disclosed in connection with this Agreement by a party ("**Disclosing Party**") to the other party ("**Receiving Party**") and marked as "Confidential", "Proprietary" or "Restricted" or which under all of the circumstances should reasonably be considered confidential, and shall include, without limitation, any property, product, technical and/or business documentation, pricing information, client information, client lists, computer programs, trade secrets, know-how, ideas, specifications, patent applications, methodologies, formulae, designs, processes, technology, techniques, drawings, inventions, diagrams, and all other relevant information pertaining to the Disclosing Party's business. Confidential Information does *not* include information that: (a) was known or possessed by the Receiving Party without confidentiality obligation before receipt from the Disclosing Party; (b) is or becomes a matter of public knowledge through no breach of this Agreement; (c) is lawfully available or received from a

third party without confidentiality obligation; (d) is authorized to be disclosed by the Disclosing Party; or (e) is independently developed by the Receiving Party without the use of, or access to, the Disclosing Party's Confidential Information.

- 1.6** "**Incidentals**" means, collectively, all services necessary to perform a Product Agreement and not expressly stated in the Product Agreement, all services requested by Client and performed by Marco outside the scope of a Product Agreement, and any incidental expenses and costs incurred by Marco in the performance of Services or any of the foregoing.
- 1.7** "**Intellectual Property**" means, collectively, all: (a) patents, patent disclosures, and inventions (whether patentable or not); (b) trademarks, service marks, trade dress, trade names, logos, corporate names, and domain names, together with all of the goodwill associated therewith; (c) copyrights and copyrightable works (including computer programs), mask works, and rights in data and databases; (d) trade secrets, know-how, and other proprietary information; and (e) all other intellectual property rights, in each case whether registered or unregistered and including all applications for, and renewals or extensions of, such rights, and all similar or equivalent rights or forms of protection in any part of the world.
- 1.8** "**License**" means any license, agreement or other prerequisite of third-party Software publishers and vendors, or Equipment manufacturers, for the Products.
- 1.9** "**Loss**" means any and all costs, expenses, damages, liabilities, fees (including reasonable attorney and expert fees), penalties, fines, or judgments of any kind or nature whatsoever.
- 1.10** "**Marco Property**" means, collectively, equipment, other goods, materials, supplies and similar items, including, without limitation, software, information and Intellectual Property owned by Marco or a third party, used by Marco or provided by Marco to Client for use by Client for the purposes of carrying out a Product Agreement.
- 1.11** "**Product Agreement**" means an agreement between the Parties for the provision of Products by Marco. Product Agreements include SOPs, proposals, change orders, and service tickets.
- 1.12** "**Product Lease**" means a lease between the Parties relating to any Products provided by Marco.
- 1.13** "**Products**" means, collectively, Services, Software, and Incidentals.
- 1.14** "**Representatives**" means, collectively, a Party's respective officers, directors, employees, agents and contractors.
- 1.15** "**Required Consents**" means, collectively, all consents, licenses, permits and approvals required to give Marco, or any Marco Representatives, the right or license to access, use and/or modify in electronic form and in other forms, including, without limitation, derivative works, Client Materials,
- 1.16** "**Resold Products**" has the meaning given to that term in Exhibit A.
- 1.17** "**Schedule of Products**" or "**SOP**" means a Schedule of Products agreed between the Parties.
- 1.18** "**Services**" means any professional consulting services, managed services, or other services to be performed by Marco, that are expressly identified in a Product Agreement.
- 1.19** "**Software**" means software licensed, or third-party software licenses resold, by Marco to Client.

## **2. Purchase, Prices and Payment.**

- 2.1** Marco agrees to provide, and Client agrees to purchase, lease or license (as applicable) the

Products at the price stated in the applicable Product Agreement (“**Price**”). The sale of Resold Products (as defined in Exhibit A) is governed by the terms in Exhibit A. Client shall pay Marco’s then prevailing rates for any Incidentals.

- 2.2** Client shall pay all undisputed invoices within thirty (30) days of the invoice date. Client shall pay a late fee of one and one-half percent (1.5%) per month, or the highest rate permitted by law, whichever is less, on any amounts not received when due. Client shall pay for all costs and expenses, including reasonable attorney fees (even if the collections matter does not include litigation), incurred by Marco in enforcing its rights for payment under this Agreement. Client shall pay all sales, use, excise, value added or other taxes; duties, levies or fees assessed by any government or other authority resulting from its relationship with Marco under this Agreement and any Product Agreement, except for taxes imposed on Marco’s income. This provision shall not apply to any taxes for which Client is exempt and for which Client has furnished Marco with a valid tax exemption certificate authorized by the appropriate taxing authority. Shipping and handling fees may apply and will be payable by Client upon invoice. Marco reserves the right to cancel, without penalty, any Product Agreement arising from pricing or other errors. Client shall not withhold any Marco Property or payment due under this Agreement for set off or reduction for any purpose whatsoever.

Whenever a Party is obligated to pay or reimburse the other Party for any attorney’s fees. Those fees shall include the allocated costs for services of in-house counsel.

- 2.3** In the event Client disputes any portion of an invoice in good faith, Client must submit its written dispute to Marco within thirty (30) days of the date of invoice or such dispute shall be deemed waived. Client shall pay the undisputed portion of the invoice by the date the invoice is due and shall submit to Marco a written explanation for the disputed amount, setting forth with specificity Client’s grounds for such dispute. In the event that the dispute is resolved against Client, Client shall pay all outstanding amounts plus interest at the rate referenced in, and calculated in accordance with, subsection 2.2 above.

- 2.4** If Client and Marco enter into a Product Lease, Client’s obligations with respect to the lease of such Products shall be solely governed by the Product Lease, except that Client shall remain liable for payment to Marco until Marco receives payment from the applicable third-party financing company. If Marco does not receive payment from the applicable third-party financing company within sixty (60) days of providing Products or Resold Products Client shall pay Marco for such Products or Resold Products.

- 3. Marco Property.** In addition to the Products, Marco may place at Client’s site or otherwise provide Marco Property. Such placement or provision of Marco Property shall not create any rights of ownership in Client or any third party. Client shall use Marco Property solely in connection with the receipt and use of Products and Client shall use reasonable care with Marco Property, but no less care than Client uses with respect to its own property. Client shall return Marco Property upon Marco request and in accordance with the requirements under the section titled, **Effect of Termination or Expiration**, below. Client will be responsible for any loss or damage to Marco Property.

- 4. Marco Property.** In addition to the Products, Marco may place at Client’s site or otherwise provide Marco Property. Such placement or provision of Marco Property shall not create any rights of ownership in Client or any third party. Client shall use Marco Property solely in connection with the receipt and use of Products and Client shall use reasonable care with Marco Property, but no less care than Client uses with respect to its own property. Client shall return Marco Property upon

Marco request and in accordance with the requirements under the section titled, Effect of Termination or Expiration, below. Client will be responsible for any loss or damage to Marco Property.

- 5. Acceptable Use Policy.** Client agrees not to use or permit third parties to use the Product(s) and Marco Property, for any illegal purpose, or to achieve any kind of unauthorized access, such as to any computer systems, software, data, real property, personal property, or violate any Intellectual Property rights or privacy rights of any third party. Client agrees not to interfere with other clients' use of Marco Products and not to disrupt any Marco network, connectivity, infrastructure, or other services whether provided directly by Marco or through Marco suppliers or contractors. Marco authorizes Client's use of the Products and any Marco Property subject to the terms of this Agreement and the Product Agreement(s) and conditioned on Client's performance of its obligations thereunder. This authorization is nontransferable. Client shall access and use (and shall cause its Representatives to access and use) the Products and Marco Property ONLY: a) as permitted by, and in accordance with its obligations under this Agreement, the applicable Product Agreement, and any Licenses; b) for their intended purposes;; c) as permitted by, and in accordance with, the specifications of the manufacturer, publisher, or vendor of the Products; d) in a commercially reasonable manner for its own internal business; e) in a manner that does not violate any Intellectual Property right of Marco or any third party;; and f) in accordance with applicable law, including Applicable Privacy Law. Client shall not alter, modify, tamper with, make derivative works from, license, distribute, rent, lend, publish, reverse engineer, decode, re-sell, export, sublease, or attempt to derive the source code of or reproduce the Products or Marco Property. Client shall take all reasonable action necessary to stop the violation or threatened violation of this Section and cause its Representatives to be bound by and comply with this Section. If Marco determines that a breach of this Section has occurred, then Marco may, in its sole discretion, and without liability: (i) restrict Client's and users' access to the Services; (ii) remove or require removal of any offending content; (iii) terminate this Agreement and any Product Agreement for cause; and/or (iv) exercise other rights and remedies, at law or in equity. Except in an emergency, as deemed necessary by Marco, or as may otherwise be required by law, before undertaking the actions in this Section, Marco will attempt to notify Client by any reasonably practical means under the circumstances, such as, without limitation, by telephone or e-mail. Client will promptly notify Marco of any event or circumstance related to this Agreement, Client's or any user's use of the Services, of which Client becomes aware, that could lead to a claim or demand against Marco, and Client will provide all relevant information relating to such event or circumstance to Marco.
- 6. Client Information.** Client represents and warrants (i) that it fully complies with Applicable Privacy Law governing the privacy and security of personally identifiable information and; (ii) that, if it does provide any personal data to Marco, Client has obtained the personal data from the data subject(s) for a lawful purpose and in accordance with the relevant requirements of the Applicable Privacy Law. To the extent any information relating to an identified or identifiable person under any Applicable Privacy Law is provided to Marco, the terms set forth in Marco's Data Processing Addendum ("DPA"), located at <http://www.marconet.com/legal> shall apply to such data processing and the terms of the DPA are hereby incorporated by reference into this Agreement with the same force and effect as though fully set forth herein. Client shall also identify such personal data for Marco and understands that such personal data may be stored and processed on servers based outside of the United States, unless required by Applicable Privacy Law or agreed to in writing.

Client acknowledges that Marco exercises no control over the information passing through Client's equipment, network, and sites. Client is solely responsible to ensure the information Client and its Representatives or any third party transmit(s) and receive(s) complies with all applicable laws and regulations.

Client shall encrypt, at the application level, Client's Confidential Information and all other data that is considered sensitive data or that must be treated as confidential under state or federal law or under Client's contractual obligations to others. This includes, but is not limited to, Social Security Numbers, financial account numbers, driver's license numbers, state identification numbers, Protected Health Information (as that term is defined in Title II, Subtitle F of the Health Insurance Portability and Accountability Act, as amended (HIPAA) and regulations promulgated thereunder) and Nonpublic Personal Information (as that term is defined in Financial Services Modernization Act of 1999 (Gramm-Leach-Bliley) and regulations promulgated thereunder).

## 7. Information Security

**7.1 Security Measures.** Marco will maintain commercially reasonable security measures for its Products that are designed to: (i) ensure the security of the Client's data stored by Marco; (ii) protect against any anticipated threats or hazards to the security or integrity of the Client's data stored by Marco; and (iii) protect against any unauthorized access to or use of Client's data as stored by Marco.

**7.2 Notification and Prevention Obligations.** Upon becoming aware, Marco shall promptly notify Client of any actual security breach that may result in the unauthorized access to or disclosure of unencrypted Client personal data. Marco agrees to take all actions reasonably necessary under the circumstances to immediately prevent the continued unauthorized access of such personal data. Marco further agrees that in the event of a breach of confidentiality or security of personal data, it will work in good faith and cooperate with Client to address the breach. Marco shall not be responsible or liable for any security breach caused by Client.

**7.3 Audits by Marco.** Marco will conduct an annual audit (under SOC2 or a similar standard) of its security measures. Upon Client's written request and subject to applicable confidentiality obligations, Marco shall provide a copy of its most recent audit report, but Marco may redact sensitive information. When available, and upon receipt of Client's written request, Marco may provide its vendors' audit report. The reports are to be treated as Confidential Information under this Agreement whether or not marked or otherwise identified as "Confidential" and remains the property of Marco, its Affiliate, or its vendor, as applicable.

**7.4 Audits by Client.** Client shall have the right to make reasonable requests to review Marco's security measures prior to the commencement of the Services and thereafter on an annual basis during the term of this Agreement. Such review may include an onsite audit, conducted by qualified personnel, in order to verify Marco's compliance with this Agreement, provided that nothing in this Agreement will be deemed to permit Client or any third party to access Marco's systems. The dates of any onsite audit shall be mutually agreed upon by the Parties. Client shall be responsible for the entire cost of any audit or information request. Marco may charge Client on a time-and-materials basis at the then-current time and materials rate for Client audits and requests for information based on the length and detail of the audit/information requested. No such audit may include activities that might result in downtime or unavailability of Marco's systems. Marco reserves the right to restrict Client's access to certain information in Marco's sole discretion.

**8. Required Consents.** Client shall obtain and keep in effect all Required Consents at all times during this Agreement. Upon request, Client will provide to Marco evidence of any Required Consent. Marco will be relieved of its obligations under this Agreement (and any time for performance of any

Products shall be reasonably extended) to the extent that they are affected by Client's failure to promptly obtain and maintain and provide to Marco any Required Consents. Client agrees that Marco may accept software terms and conditions and other Licenses (e.g., end user license agreements) on behalf of Client while providing and installing Products and Resold Products to Client, and Client agrees to be bound by those License terms.

**9. Software Licenses and Other Agreements.** Client shall enter into, maintain, comply with and be bound by any Licenses applicable to Products. Unless expressly provided otherwise in a Product Agreement, Client has the sole responsibility to manage its ownership and use of the Software including complying with any License terms, retaining copies of License agreements and other ownership documentation, monitoring License renewal and expiration dates, and renewing or terminating such Licenses.

## **10. Representations and Warranties.**

**10.1 Mutual Representation and Warranties.** Each Party represents and warrants to the other Party that: (a) it has full power and authority to enter into this Agreement; (b) it is in compliance and will continue to comply during the term of this Agreement, with all laws and regulations applicable to such Party; and (c) it has the requisite corporate power and authority to execute, deliver and perform its obligations under this Agreement.

**10.2 Client Representations and Warranties.** Client represents and warrants that (i) it owns, is a licensee of, having the right to sublicense, Client Data; (ii) Marco's possession or use of the Client Data does not and will not infringe on, violate, or misappropriate Intellectual Property rights of any third party; (iii) it will not use, nor will it allow any third parties under its control to use, the Products for high-risk activities, such as the operation of nuclear facilities, air traffic control, or life support systems, where the use or failure of the Services could lead to death, personal injury, or environmental damage. Client shall not make any representations or warranties on behalf of Marco to any third party. Client shall be solely responsible and liable for any representations or warranties that Client makes to any third-party regarding Marco, the Products, or any other aspect of this Agreement.

**10.3 Marco Products Representations and Warranties.** Marco represents and warrants that it will provide the Products in a good and workmanlike manner and that the Products will meet the generally accepted standards of the industry to which the Products apply. Client must provide a written notice to Marco within ten (10) days after the delivery of the Products ("**Warranty Period**") describing any breach of the foregoing warranty in sufficient detail. Marco, shall as its sole obligation and Client's exclusive remedy for any breach of the foregoing warranty, use commercially reasonable efforts correct any non-compliance reported to Marco by Client in writing during the Warranty Period.

**10.4 Warranty Disclaimer.** EXCEPT AS EXPRESSLY STATED IN THIS SECTION, MARCO PROVIDES ALL THE PRODUCTS AND MARCO PROPERTY "AS IS" AND MARCO DOES NOT PROVIDE AND EXPRESSLY DISCLAIMS ANY WARRANTY OF ANY KIND RELATING TO THE PRODUCTS AND MARCO PROPERTY, EXPRESS OR IMPLIED, STATUTORY OR OTHER, INCLUDING BUT NOT LIMITED TO, WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, TITLE, NONINFRINGEMENT AND ALL WARRANTIES WHICH ARISE FROM COURSE OF DEALING, USAGE OR TRADE PRACTICE.

WITHOUT LIMITING THE FOREGOING, CLIENT ACKNOWLEDGES AND AGREES THAT NO TECHNOLOGY IS FOOLPROOF OR IMMUNE FROM ATTACK. MARCO CANNOT MAKE AND

EXPRESSLY DISCLAIMS ANY WARRANTY, EXPRESS OR IMPLIED, THAT THE PRODUCTS AND MARCO PROPERTY, OR ANY RESULTS OR USE THEREOF WILL OPERATE WITHOUT INTERRUPTION, SECURELY, ERROR FREE, WITHOUT DEFECT, FREE OF HARMFUL CODE, THIRD PARTY DISRUPTION OR THAT MARCO WILL CORRECT ALL DEFECTS. IN ADDITION, CLIENT UNDERSTANDS AND ACKNOWLEDGES THAT THE INTERNET IS NOT A SECURE MEDIUM, MAY BE INHERENTLY UNRELIABLE AND SUBJECT TO INTERRUPTION OR DISRUPTION AND MAY BE SUBJECT TO INADVERTENT OR DELIBERATE BREACHES OF SECURITY, FOR WHICH MARCO SHALL NOT BE HELD LIABLE. NO STATEMENT OR WRITING OF ANY REPRESENTATIVES OF MARCO WILL CREATE ANY WARRANTY WHATSOEVER NOT SET FORTH IN THIS AGREEMENT.

**11. Intellectual Property.** Each Party is, and shall remain, the exclusive owner of its respective Intellectual Property and Confidential Information, whether existing prior to or created following the Effective Date of this Agreement specifically, without limitation:

**11.1 Products:** Marco retains all rights, title, and interest, in the Products and in all improvements, enhancements, modifications, or derivative works thereof including, without limitation, all Intellectual Property rights. The Products contain proprietary and confidential information that is protected by applicable Intellectual Property and other laws and Client agrees not to disclose such information to any third party without Marco's prior written permission. If not subject to a separate License, Marco hereby grants Client a limited non-transferable, non-assignable, non-sublicensable, non-exclusive, royalty-free license solely during the term of this Agreement to use Marco Intellectual Property delivered to Client and designated for use with the Products, solely and only to the extent necessary for using the Products.

**11.2 Client Data:** Marco acknowledges and agrees that all Client Data including, Intellectual Property rights contained in Client Data, are owned or licensed by Client. Client grants Marco a license to store, record, transmit, and display the Client Data to perform Marco's obligations under this Agreement. Client acknowledges and agrees that Marco may provide consulting services to, or prepare materials for, third parties that may be the same or similar to the Products provided to Client under this Agreement.

**12. Confidential Information.** During the term of this Agreement each Receiving Party shall use reasonable, industry standard physical, technical, and administrative controls designed to protect and maintain the confidentiality of and use the Disclosing Party's Confidential Information only for carrying out Receiving Party's rights and performing its obligations under this Agreement and the applicable Product Agreement(s). Receiving Party shall disclose Disclosing Party's Confidential Information only to Receiving Party's Representatives who need to know the information in order to carry out this Agreement and the applicable Product Agreement(s), and who are bound to enforceable confidentiality obligations consistent with this Agreement. Receiving Party shall cause its Representatives to be bound by and comply with this Section and Receiving Party shall be liable to the Disclosing Party for Receiving Party's Representatives' noncompliance. Each Party's confidentiality obligations shall survive this Agreement during the term of this agreement and for three (3) years after the Agreement has expired (other than due to a breach of this Agreement by Receiving Party).

**12.1 Compelled Disclosure.** If Receiving Party becomes legally compelled (by deposition, interrogatory, subpoena, civil investigative demand, or similar process) to disclose any of Disclosing Party's Confidential Information, then Receiving Party shall (if legally permitted) notify Disclosing Party of the requirement promptly in writing so that Disclosing Party may

seek a protective order or other appropriate remedy. If a protective order or other remedy is not obtained, or if Disclosing Party waives in writing compliance with the terms hereof, then Receiving Party shall furnish only that portion of the information which Receiving Party is advised by written opinion of counsel is legally required and Receiving Party will exercise reasonable efforts to obtain confidential treatment of such information.

**12.2 Return/Destruction of Confidential Information.** Upon the Disclosing Party's written request, or upon termination of this Agreement, the Receiving Party shall promptly return or destroy (or, in the case of electronic embodiments, permanently erase), as the Disclosing Party may specify in their request, all material embodying Confidential Information in any form (including, without limitation, all summaries, copies, and excerpts of Confidential Information) in its possession or under its control, unless legally required to be retained. Notwithstanding the foregoing, Confidential Information stored in system-type media, such as system caches and backup mechanisms, need not be returned or destroyed so long as such media is: (a) maintained in confidence; and (b) not readily accessible to users.

**12.3 Injunctive Relief.** The Receiving Party acknowledges that a violation of this Agreement may cause irreparable harm for which monetary damages would be difficult to ascertain or an inadequate remedy. Therefore, in addition to any other rights and remedies available to it, the Receiving Party agrees that the Disclosing Party will have the right to seek injunctive relief for any violation of this Agreement without posting bond, or by posting bond at the lowest amount required by law.

**13. Privacy Policy.** Marco uses, processes, and stores private information according to its Privacy Policy located at <https://www.marconet.com/legal>.

**14. Disclosure Notification.** If either Party becomes aware of an unauthorized disclosure of Confidential Information, they shall notify the other Party within three (3) business days.

**15. Communication and Notices.** Notices, requests and consents under this Agreement including requests for termination of Services under any Product Agreement shall be provided in writing to the Parties at the address(es) provided below, or to such other address(es) as is provided in writing and are effective upon personal delivery; or three (3) days' after posting by certified mail, return receipt requested; or the day after being sent by verified delivery overnight courier with trackable delivery (e.g., FedEx). In the case of Client, a copy of notices requesting termination of Services shall be sent contemporaneously by email and U.S. Mail to the addresses below.

**MARCO:** Legal Counsel  
Marco Technologies, LLC  
4510 Heatherwood Road  
St. Cloud, MN 56301

**COPY TO:** [legalservices@marconet.com](mailto:legalservices@marconet.com)

## 16. Indemnification

**16.1 Mutual Indemnification.** Subject to the limitations set forth herein, each Party shall defend, indemnify and hold harmless the other and its Representatives from and against third party (other than an indemnitee Affiliate) demands, claims, actions, suits, or similar proceedings ("Claim(s)") for Losses, as defined below, to the extent caused by (a) the indemnifying Party's negligent, reckless, or willful acts or omissions; (b) real property



damage or personal injury, including death; and (c) a breach of either Parties' representations and warranties, to the extent not limited by sole and exclusive remedy language in this Agreement.

**16.2 Marco Indemnity.** Marco shall defend, indemnify, and hold harmless Client from and against any and all Losses awarded against Client in a final judgment or in a Marco-approved settlement, arising out of or resulting from any Claim by a third party against Client that any of the Services or Marco-owned deliverables or Client's receipt or use thereof knowingly infringes any Intellectual Property Right of a third party existing as of the date of delivery of the applicable Products or Marco-owned deliverables and arising under the laws of the United States ("**IP Claim**"), provided however, Marco shall have no obligations under this **Indemnification** Section with respect to any IP Claims or Losses to the extent arising out of: (i) modification of the Services or deliverables other than with Marco's express prior written authorization and in strict accordance with Marco's written directions and specifications; (ii) any Client Materials; (iii) Marco's compliance with any requested features, functionality, designs, plans, specifications, requirements, or instructions provided by or on behalf of Client, whether in a Product Agreement, in connection with preparation of a Product Agreement, or otherwise; (iv) combination, operation, or use of the Services or deliverables in or with, any technology (including any software, hardware, firmware, system, or network) or service not provided by Marco or specified for Client's use in the Services; (v) use of the Services or deliverables by Client after Client was notified of the allegedly infringing activity or after being informed of modifications that would have avoided the alleged infringement; (vi) Services or deliverables not used in accordance with the terms and conditions of this Agreement and the applicable Product Agreement; (vii) any Resold Products or other third-party owned materials (including, without limitation, any "open source" materials), (viii) staff augmentation Services or other similar activities whereby Marco is providing support services and working at Client's direction, (ix) use of the Services or deliverables by any third-party or by or on behalf of Client that is outside the purpose, scope, or manner of use authorized by this Agreement or in any manner contrary to Marco's instructions; (x) negligence, abuse, misapplication, or misuse of the Services or deliverables by or on behalf of Client or a third party; or (xi) Losses for which Client is obligated to indemnify Marco pursuant to this **Indemnification** Section. For purposes of clarity, Client is solely responsible for ensuring that: (A) any features, functionality, designs and other specifications of any Products requested by Client does not infringe the rights of third parties; and (B) Client's compliance with all laws applicable to Client and Client's business (including, without limitation, Client's use of any deliverables).

**16.3 Remedy.** If one or more of the Services or deliverables are determined to, or are believed by Marco to, infringe the rights of a third party, Marco may, at its sole option, elect to: (I) modify or replace the Services or deliverable(s), in whole or part, to seek to make the Services and/or deliverables non-infringing, while providing materially equivalent features and functionality, and such modified or replacement deliverable shall constitute a Deliverable under this Agreement; (b) obtain the right for Client to continue to use the Deliverable(s) materially as contemplated by this Agreement or an applicable SOW; or (c) if none of the foregoing is, in Marco's discretion, commercially practicable, terminate this Agreement or the affected Product Agreement(s) in its entirety or with respect to the affected part or feature of the Services or deliverable, effective immediately upon written notice to Client, in which event Client shall cease all use of such Services and deliverables immediately upon receipt of Marco's notice, and Marco shall promptly refund to Client the fees paid by Client for such deliverable(s), for any period after the date of such termination.

THIS INDEMNIFICATION SECTION STATES THE ENTIRE LIABILITY OF MARCO, AND THE SOLE AND EXCLUSIVE REMEDY OF CLIENT, WITH RESPECT TO ANY ACTUAL OR ALLEGED INFRINGEMENT OF ANY THIRD-PARTY INTELLECTUAL PROPERTY RIGHTS.

**16.4 Client Indemnification.** Client shall defend, indemnify and hold Marco and its Representatives harmless from and against all Claims and any Losses arising from or relating to: (a) Marco's use or reliance upon any Client Materials or any other plans, specifications, content and materials (including, without limitation, any software, hardware, data and networks) provided by or on behalf of Client in connection with the Products; (b) Client's violation of any law, rule or regulation applicable to Client; or (c) any dispute or other proceeding (including, without limitation, response to any third-party subpoena, but excluding any dispute between Client and Marco) in which Marco becomes involved (even if only as a non-party or third-party participant) as a result of the Products and/or Marco's performance of this Agreement, including reimbursement of Marco's time and expenses (including reasonable external and internal legal costs) incurred to respond to any request or participate in any proceedings. In (c) above, Client agrees to pay Marco the hourly rates of Marco professionals for time spent preparing for and participating in responding to and participating in subpoenas, depositions, other discovery, litigation, hearings and dispute resolution proceedings in whatever form they may take.

**16.5 Process.** As soon as practicable, the Party requesting indemnification shall notify the indemnifying Party of its potential right to defense and indemnification in a writing detailing the basis for the request and the third-party Claim; provided that the failure to give notice within that time shall relieve the indemnifying Party of its obligations under this Section only to the extent that the indemnifying Party is actually prejudiced by such failure. If it accepts the defense, the indemnifying Party shall control the defense and resolution of the Claim, including the selection and retention of counsel. The Party requesting indemnification shall cooperate in the defense and resolution of any Claim at the expense of the indemnifying Party. Failure to provide such cooperation shall relieve the indemnifying Party of its obligations under this Section. The Party requesting indemnification may participate in and observe the defense and resolution of any Claim with its own counsel at its sole cost and expense. The indemnifying Party shall not settle the Claim in a manner that materially adversely affects the indemnified Party without its consent, which shall not be unreasonably withheld.

**17. Limitation on Types of Damages.** IN NO EVENT SHALL MARCO OR ITS REPRESENTATIVES BE LIABLE TO CLIENT, ITS REPRESENTATIVES OR ANY THIRD PARTY FOR CLAIMS OR LOSSES RESULTING FROM, ARISING FROM, OR RELATING TO: (A) CLIENT'S OR ITS REPRESENTATIVES' VIOLATION OF THIS AGREEMENT OR ANY PRODUCT AGREEMENT, DELAY OR FAILURE TO PERFORM ANY OBLIGATIONS THEREUNDER, ACTIONS OR DIRECTIONS WHICH AFFECT MARCO'S ABILITY TO PROVIDE, OR ABILITY TO USE THE PRODUCTS, (B), ANY SUSPENSION, DOWNTIME, SERVICE LIMITATIONS, REMEDIATION, OR DEFECTS; (C) ANY LOSS OF PRODUCTION, USE, DATA, BUSINESS, REVENUE, SAVINGS, GOODWILL, SOFTWARE, HARDWARE, OR PROFIT; (D) ANY GOOD FAITH ACTION OF MARCO IN PERFORMING THIS AGREEMENT (FOR EXAMPLE, TAKING STEPS TO PROTECT A CLIENT NETWORK IN THE PERFORMANCE OF MANAGED SECURITY SERVICES); (E) MARCO'S AND ITS REPRESENTATIVES' COMPLIANCE WITH ANY DIRECTION OR INSTRUCTION OF CLIENT OR ITS REPRESENTATIVES, OR (F) ANY INCIDENTAL, INDIRECT, CONSEQUENTIAL, SPECIAL, PUNITIVE, EXEMPLARY, OR ENHANCED DAMAGES, WHETHER ARISING OUT OF CONTRACT, TORT, STRICT LIABILITY, OR OTHER LEGAL OR EQUITABLE THEORIES WHATSOEVER, AND REGARDLESS OF HAVING BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES OR WHETHER SUCH DAMAGES WERE FORESEEABLE.

**17.1 Limitation of Amount of Damages.** IN NO EVENT SHALL MARCO AND ITS REPRESENTATIVES' COLLECTIVE AGGREGATE LIABILITY FOR ANY CLAIMS OR LOSSES (AS DEFINED ABOVE AND WHETHER IN CONTRACT, TORT, STRICT LIABILITY, OR ANY OTHER LEGAL OR EQUITABLE THEORY) EXCEED THE AGGREGATE AMOUNT PAID OR PAYABLE TO MARCO IN THE SIX (6) MONTHS IMMEDIATELY PRECEDING THE LAST EVENT UNDER THE PRODUCT AGREEMENT WHICH GAVE RISE TO THE CLAIM(S).

**17.2 Allocation of Risk.** EACH PARTY ACKNOWLEDGES THAT THE FOREGOING DAMAGES EXCLUSIONS AND LIMITATIONS OF LIABILITY SET FORTH IN THIS SECTION REFLECTS THE ALLOCATION OF RISK SET FORTH IN THIS AGREEMENT AND ACKNOWLEDGES THAT THE OTHER PARTY WOULD NOT HAVE ENTERED INTO THIS AGREEMENT ABSENT SUCH EXCLUSIONS AND LIMITATIONS OF LIABILITY OR THAT THE PRICES PAID BY CLIENT FOR THE SERVICES WOULD HAVE BEEN HIGHER.

**17.3 Service Level Liability.** The Services will meet the technical standards of performance or service levels, if any, set forth in the applicable Product Agreement. Client's sole and exclusive remedy for any failure to meet the applicable technical standards of performance or service levels shall be as specified in the applicable Product Agreement.

## 18. Term and Termination.

**18.1 This Agreement.** This Relationship Agreement shall commence on the Effective Date and remain in effect until terminated by either party as provided in this **Term and Termination** Section.

**18.2 Product Agreement.** The term of each Product Agreement shall be as specified in that Product Agreement.

**18.3 Termination for Convenience.** Either Party may terminate this Relationship Agreement for convenience at any time upon written notice to the other Party. If there are any active Product Agreements, termination shall be effective upon the expiration or termination of the last Product Agreement. If there are no active Product Agreements, termination shall be effective upon receipt of the written notice.

**18.4 Termination for Breach.** Either Party may terminate this Agreement or any individual Product Agreement in accordance with the following:

i. **Cure.** If the other Party breaches any material provision of this Agreement or any Product Agreement and fails to cure such breach within thirty (30) days of receipt of notice of such breach from the non-breaching Party ("**Cure Period**"). The notice from the non-breaching Party shall specify the basis on which the Agreement or Product Agreement is being terminated, including a description of the breach and how the breach can be cured within the Cure Period. If the breaching Party fails to cure the breach within the Cure Period, then termination shall be effective on the thirty-first (31st) day following receipt of such notice by the breaching Party.

ii. **No Opportunity to Cure.** If: (a) the other Party breaches any representation or warranty in this Agreement; (b) any representation or warranty is inaccurate, incomplete, false or misleading in any material aspect; or (c) the breach is of a type or nature that is not capable of being cured within such time period (such as, by way of example and not limitation, an obligation relating to Confidential Information), the non-breaching party may

immediately terminate this Agreement and any affected Product Agreement. The notice from the non-breaching Party shall specify the basis on which the Agreement or Product Agreement is being terminated, including a description of any breach. Termination shall be effective immediately upon receipt of such notice by the breaching Party.

**18.5 Termination for Financial Insecurity.** Either Party may terminate this Agreement and all Product Agreements upon written notice if the other Party ceases conducting business in the normal course, admits its insolvency, makes an assignment for the benefit of creditors, or becomes the subject of any judicial or administrative proceedings in bankruptcy, receivership or reorganization. Termination shall be effective upon receipt of the written notice.

**18.6 Suspension of Products or Credit.** Marco may suspend, terminate, repossess or otherwise deny Client and any of its Representatives access to or use of the Products (collectively, "**Suspension**") and suspend or terminate Client's credit ("**Credit Hold**") without liability if: a) it is required by law to do so; b) Client materially breaches this Agreement or any Product Agreement or (c) Client fails to make any payment when due. Upon Suspension, Client shall immediately cease, and cause its Representatives to cease, access and use of the Products, until further notice from Marco. Any Suspension or Credit Hold shall not terminate this Agreement or any Product Agreement, nor relieve Client from its payment obligations, which shall continue during any Suspension or Credit Hold, provided that nothing in this paragraph will limit either party's termination rights under any other provision of this Agreement.

**18.7 Effect of Termination or Expiration.** Upon termination or expiration of this Agreement or a Product Agreement, except as expressly identified under this **Effect of Termination or Expiration** Section: (i) Client shall no longer have access rights, privileges, and authorizations to the Products; (ii) at its sole expense, Client shall: (A) cease using Marco Property, the Products; (B) uninstall and return the Software; (C) return the Marco Property; and (D) take all necessary measures to ensure that it will have access to its data independent from Marco; (iii) following the Disclosing Party's request, the Receiving Party shall return or destroy (and certify the return or destruction of) the Disclosing Party's Confidential Information and all copies or embodiments thereof, as directed by the Disclosing Party, and (iv) Client shall immediately pay all amounts due to Marco. Any off-boarding, data extraction, and/or migration services Marco provides, including those that are the subject of a separate Product Agreement, shall be subject to and governed by the terms of this Agreement. Client shall pay the manufacturer's suggested retail price for any Marco Property which Client fails to return within thirty (30) days of termination or expiration of the applicable Product Agreement.

**19. Changes to Products.** Marco reserves the right in its sole discretion to make changes to the Products and Marco Property to maintain or enhance the quality, delivery, efficiency, effectiveness or performance thereof to its clients, provided such changes do not materially reduce the functionality of such Products and Marco Property. Either Party may request changes to its rights or obligations under a Product Agreement by providing the other a writing detailing the requested change through the project manager identified in the affected Product Agreement. The Party receiving the request shall respond in a writing either detailing the terms and conditions which apply to the requested change or denying the request.

**20. Miscellaneous.**

- 20.1 Dispute Resolution, Venue, and Governing Law.** If a dispute arises out of or relates to this Agreement or any Product Agreement, the Parties agree to engage management in direct discussions in good faith to attempt to resolve the dispute. If a resolution cannot be reached through such discussions, the Parties agree to engage in nonbinding mediation to attempt to resolve the dispute. If mediation fails, the dispute will be resolved by arbitration before a single arbitrator administered by the American Arbitration Association in accordance with its Commercial Arbitration Rules. The arbitration will take place in Stearns County, Minnesota. The arbitrator's decision will be final and binding. Without limiting the foregoing, the Parties agree that no arbitrator has the authority to award relief in excess of what this Agreement or the applicable Product Agreement provides. All claims shall be arbitrated individually. Client shall not bring or join any class action of any kind in court or in arbitration. Nothing in this Section shall prohibit either party from seeking injunctive relief from any authority authorized by law to grant it. This Section does not prohibit Marco from enforcing any claim for payment in any court or other forum. THE PARTIES WAIVE ANY RIGHT TO JURY TRIAL ARISING OUT OF THIS AGREEMENT OR ANY PRODUCT AGREEMENT. This Agreement and all Product Agreements shall be governed by the laws of Minnesota without regard to choice or conflicts of law principles.
- 20.2 Assignment, Successors, Beneficiaries.** Client may not transfer, sell, or, assign, this Agreement, any Product Agreement, or any right or obligation arising thereunder, in whole or in part, without the written consent of Marco, including, without limitation, by operation of law, upon plan of merger, or upon Client being acquired or selling substantially all of its assets. Marco may transfer or assign this Agreement, any Product Agreement in whole or in part, without notice or Client's consent. The Parties agree that there shall be no third-party beneficiaries to this Agreement or any Product Agreement. Subject to the foregoing, this Agreement and any Product Agreement(s) shall be binding on and inure to the benefit of the Parties successors and permitted assigns.
- 20.3 Independent Contractors.** The relationship between the Parties is that of independent contractors. Nothing in this Agreement or any Product Agreement shall be construed as creating any agency, partnership, joint venture or other form of joint enterprise, employment, or fiduciary relationship between the Parties. Unless expressly provided herein or in a Product Agreement, neither Party shall have the authority to act on behalf of or to bind the other.
- 20.4 Export Compliance.** Client agrees to comply with all export and re-export control laws and regulations as may be applicable to any transaction hereunder, including, without limitation, the Export Administration Regulations promulgated by the United States Department of Commerce, the International Traffic in Arms Regulations promulgated by the United States Department of State, and any of the regulations promulgated by the Office of Foreign Assets Control of the United States Department of the Treasury.
- 20.5 Insurance.** Each Party will obtain and maintain in effect during the term of this Agreement, a policy or policies of comprehensive general liability, workers' compensation, professional liability, cyber liability insurance, and other types of insurance and amounts of coverage each deems necessary to protect their individual interests from such claims, liabilities, or damages which may arise out of the performance of their respective obligations under this Agreement. For the avoidance of doubt, each Party is solely responsible for insuring its personal property wherever located, and, except as set forth in this Agreement or any Product Agreement, each Party acknowledges that neither of them will insure the property of the other while it is in transit or in the possession of the opposite Party.

- 20.6 Subcontractors.** Marco may engage subcontractors to perform Services under any Product Agreement. Except as provided herein, Marco shall be fully responsible for the acts of all subcontractors to the same extent it is responsible for the acts of its own employees.
- 20.7 Employee Assignments.** Marco may assign or reassign employees in its sole discretion to perform the Services for Client.
- 20.8 Publicity.** Marco may publicize its business relationship with the Client and the nature of the Services performed for Client, in its discretion.
- 20.9 Non solicitation.** Each Party agrees not to, during the term of this Agreement and for a period of one (1) year thereafter, directly or indirectly solicit, hire, or otherwise engage with in any like activity in any manner whatsoever, any of the other Party's employees that (i) worked directly or indirectly in connection with this Agreement or any Product Agreement, or (ii) about which the Party obtained personnel information or other non-public information in connection with this Agreement or any Product Agreement during the term of this Agreement or any Product Agreement. For each breach of the forgoing restrictions, the breaching Party will pay the other Party as liquidated damages and not as a penalty, an amount equal to fifty percent (50%) of the last year's on-target annual compensation of such employee. It shall not be a violation of this section if a Party's employee responds, without solicitation by the other Party, to a job posting in the general circulation and not targeted toward any particular person.
- 20.10 Force Majeure.** Neither Party shall be liable for or be in breach of this Agreement or any Product Agreement, for failure or delay in performance to the extent caused by circumstances beyond the Party's reasonable control, including, but not limited to, acts of God, flood, fire, earthquake, war, terrorism, strikes or other labor or industrial disturbances, war, epidemic, pandemic, cyberattacks that could not have been reasonably prevented, internet or other system or network outages that could not have been reasonably prevented, governmental action, or interruption of, delay in, or inability to obtain on reasonable terms and prices adequate power, telecommunications, transportation, raw materials, supplies, goods, equipment, Internet or other services ("Force Majeure Event(s)"). At its option, either Party may terminate any Product Agreement where the Products thereunder are delayed more than sixty (60) days by a Force Majeure Event(s); provided, however, that Client is not excused from paying Marco for all amounts owed for Products provided prior to the termination of the Product Agreement. A Force Majeure Event may not extend any payment obligation of Client by more than fifteen (15) days.
- 20.11 Severability.** If any provision of the Agreement or any Product Agreement is held invalid by any law, order or regulation of any government or other authority, or by the final determination of any court, such invalidity will not affect the enforceability of any other provisions not held to be invalid. In case any one or more of the provisions contained in this Agreement shall, for any reason, be held to be invalid, illegal or unenforceable in any respect, such invalidity, illegality or unenforceability shall not affect the other provisions of this Agreement, and this Agreement shall be construed as if such invalid, illegal or unenforceable provision had never been contained herein. If moreover, any one or more of the provisions contained in this Agreement shall for any reason be held to be excessively broad as to duration, geographical scope, activity or subject, it shall be construed by limiting and reducing it, so as to be enforceable to the extent compatible with the applicable law as it shall then appear.

**20.12 Remedies.** Unless and to the extent provided otherwise and subject to the limitations of liability herein, all remedies set forth in this Agreement will be cumulative, in addition to, and not in lieu of any other remedies available to either Party at law, in equity or otherwise, and may be enforced concurrently or from time to time.

**20.13 Headings, Survival, and No Waiver.** Headings are for convenience only and are not part of this Agreement. Any term in this Agreement or any Product Agreement by its nature designed to survive completion, expiration, or termination of the Agreement or Product Agreement shall so survive. The failure of Marco at any time to require performance by Client of any provisions of this Agreement or a Product Agreement will in no way affect Marco's right to require performance of that provision nor be construed as a waiver of any Marco right under this Agreement or the Product Agreement.

**20.14 Counterparts and Electronic Signatures.** Any Product Agreement may be executed in two or more counterparts, each of which will be deemed to be an original, but all of which together will constitute one and the same instrument. The execution and delivery of counterparts may be accomplished by email or facsimile signatures. The Parties agree that the electronic signature of a party to this Agreement, including exchange of counterparts by portable document format (pdf), shall be as valid as an original signature of such party and shall be effective to bind such party to this Agreement.

**21. Entire Agreement and Amendment.** This Agreement (including its Exhibits) and the applicable Product Agreement(s) constitute the entire understanding between the Parties relating to the subject matter thereof and supersede and replace any and all prior discussions, agreements, understandings, promises, and representations whatsoever, whether oral or written, express or implied, between the Parties. Except as expressly stated herein, no modification of or amendment to this Agreement or any Product Agreement will be effective unless in writing and signed by a duly authorized representative of both Parties.

**Version Updated:** August 25, 2023

## EXHIBIT A: TERMS SPECIFIC TO RESOLD PRODUCT SALES ONLY

This Exhibit A: Terms Specific to Resold Product Sales Only applies to any order for software, hardware, or ("**Resold Products**") made by Client, pursuant to a quotation issued by Marco ("**Quotation**"). As used in this Exhibit A, the term "**Services Sold by Part Number**" refers to services, which although ordered from Marco, are procured from, and supplied by, a third party (i.e., Marco does not directly perform or control the work) and are therefore considered Resold Product. Any such orders shall be subject to the terms and conditions of this Exhibit A.

### 1. **Product Returns and Warranty Assistance.**

- a. Client acknowledges that Marco is reselling all Resold Products purchased by Client and that Resold Products are manufactured and/or delivered by a third party. Client shall not resell the Resold Products.
- b. To the extent available, Marco shall, to the extent assignable, pass through to Client the manufacturer's warranties for each Resold Product and agrees to use reasonable efforts to facilitate the manufacturer's return policies. In no event will Marco provide return or warranty coverage for Resold Products beyond that provided by the manufacturer. Resold Products that are accepted for return are subject to the manufacturer's applicable restocking fee(s).
- c. Client acknowledges that the terms and conditions (including, without limitation, any License) governing the use of Resold Products shall be solely between Client and the manufacturer of such Products.

### 2. **Product Returns and Warranty Assistance.** Product Use and Product Warranty Disclaimer. Client will not use the Resold Products for use in life support, life sustaining, nuclear or other applications in which failure of such Resold Products could reasonably be expected to result in personal injury, loss of life, or catastrophic property damage. Client agrees that Marco is not liable for any claim or damage arising from such use.

MARCO MAKES NO WARRANTIES OF ANY KIND WITH REGARD TO THE RESOLD PRODUCTS. MARCO DISCLAIMS ALL REPRESENTATIONS AND WARRANTIES, EXPRESS OR IMPLIED, AS TO THE RESOLD PRODUCTS, INCLUDING, WITHOUT LIMITATION, ANY WARRANTY OF PERFORMANCE, FREEDOM FROM DEFECTS, MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, OR NON-INFRINGEMENT.

### 3. **Shipment and Risk of Loss for Product Sales.** All shipments of Resold Products to Client will be FOB point of shipment. Insurance coverage, freight charges, transportation costs, and all other expenses applicable to shipment to Client's identified point of delivery will be the responsibility of Client and Client agrees to pay the same upon invoice. Risk of loss will pass to Client upon delivery of the Resold Products to the common carrier (regardless of who pays such common carrier).

### 4. **Permitting Compliance for Resold Products.** Client will obtain all licenses, permits, and approvals required by any governmental agency, having jurisdiction over the transaction.

### 5. **Price and Payment.** The Price set forth in any SOP is exclusive of all taxes, duties, licenses, and tariffs, payment of which shall be Client's obligation. Prices quoted are firm for fifteen (15) days unless otherwise specified in the SOP. Payment is due thirty (30) days from the date of the invoice, which will be sent upon shipment of the Resold Product. In the event Client chooses to finance its



purchase using a third party, Client remains liable for payment to Marco until Marco receives complete payment from such third party.

- 6. Export.** Client agrees to comply with all export and re-export control laws and regulations as may be applicable to any transaction hereunder, including, without limitation, the Export Administration Regulations promulgated by the United States Department of Commerce, the International Traffic in Arms Regulations promulgated by the United States Department of State, and any of the regulations promulgated by the Office of Foreign Assets Control of the United States Department of the Treasury. Client covenants that it will not, either directly or indirectly, sell, (re)export (including, without limitation, any deemed (re)export as defined by applicable law), transfer, divert, or otherwise dispose of any Product, or related software or technology, to: (a) any country or region of a country (or nationals thereof) subject to antiterrorism controls, or a U.S. embargo, or (ii) any destination prohibited (without a valid export license or other authorization) by the laws or regulations of the United States, without obtaining prior authorization from the competent government authorities, as required by all applicable laws and regulations. Client certifies, represents and warrants that no Resold Product shall be used for any military or defense purpose, including, without limitation, being used to design, develop, engineer, manufacture, produce, assemble, test, repair, maintain, modify, operate, demilitarize, destroy, process, or use military or defense articles. Notwithstanding any sale of Resold Products by Marco, Client acknowledges that it is not relying on Marco for any advice or counseling on export control requirements. Client agrees to indemnify, to the fullest extent permitted by law, Marco from and against any fines, penalties and reasonable attorney fees that may arise as a result of Client's breach of this Section.
- 7. Cancellation.** All sales are final. The purchase of Resold Products may only be canceled by Client upon written approval of Marco and upon terms that indemnify Marco against all losses related to such cancellation.
- 8. Limitation of Liability. NO MONETARY RECOVERY IS AVAILABLE FROM MARCO FOR WARRANTY CLAIMS. IN ADDITION, IN NO EVENT WILL MARCO'S LIABILITY TO CLIENT EXCEED THE PURCHASE PRICE PAID FOR THE RESOLD PRODUCT THAT IS THE BASIS FOR THE PARTICULAR CLAIM. MARCO WILL NOT, IN ANY EVENT, BE LIABLE FOR ANY DIRECT, SPECIAL, INDIRECT, CONSEQUENTIAL, INCIDENTAL, EXEMPLARY, OR PUNITIVE DAMAGES (INCLUDING, WITHOUT LIMITATION, LOST PROFITS, LOST REVENUES, LOST OR DAMAGED DATA, AND LOSS OF BUSINESS OPPORTUNITY), HOWEVER CAUSED, ARISING OUT OF THE USE OF OR INABILITY TO USE THE RESOLD PRODUCT, OR IN ANY WAY CONNECTED TO THIS EXHIBIT A, EVEN IF MARCO HAS BEEN ADVISED OF SUCH DAMAGES AND EVEN IF DIRECT DAMAGES DO NOT SATISFY A REMEDY. THE FOREGOING LIMITATION OF LIABILITY WILL APPLY WHETHER ANY CLAIM IS BASED UPON PRINCIPLES OF CONTRACT, WARRANTY, NEGLIGENCE, INFRINGEMENT OR OTHER TORT, BREACH OF ANY STATUTORY DUTY, PRINCIPLES OF INDEMNITY, CONTRIBUTION, OR OTHERWISE.**



To: Village Board of Trustees  
From: Daniel M. Meister – Chief of Police  
Date: January 31, 2024  
Re: Fox Valley Metro Police Department Monthly  
Report – February 2024

---

## **New and Noteworthy**

### **PERSONNEL**

Metro Anniversaries for February:

- Lieutenant Mark Wery: 16 years.
- Investigator Scott Van Schyndel: 15 Years.

Lieutenant Mark Ulman has notified the department of his retirement being effective May 1<sup>st</sup>. He has served the villages with Metro for 25 years,

CSO Ciara Oakley is expected to complete her initial, field training process with us on/around February 12<sup>th</sup>.

Hannah Vallafskey is our newest CSO. She accepted a part-time job offer and is expected to start training with us on February 6<sup>th</sup>.

Staff will participate in annual hearing testing on 2/7.

### **TRAINING**

Officers completed training in the months of December and January for the following topics:

- Advanced Roadside Impaired Driving Enforcement
- Taser Recertification
- Hazmat and Arson
- Red Dot Optics
- School Resource Officer training
- Legal Update with Outagamie County District Attorney's Office
- K9 Certifications

Some members of the department have started their FAA Part 107 remote pilot training course to obtain their FAA license to fly the drone.

## FLEET

Several weeks ago, the department started the process of seeking bids / quotes for a new squad car purchase.

## ADMINISTRATION

Below are highlights for the month of December for the Police Clerks and Administrative Manager:

Fulfilled 58 request for records.

Fulfilled 26 evidence requests.

Entered 315 parking citations.

Completed 8 background checks for operator licenses.

Sent up 42 referrals/in custody reports to the District Attorney's office.

Screened 41 code 4 calls for service.

Performed crossing guard duties for seven shifts.

Upcoming meetings:

Metro K-9 Foundation: 02/08

Quad Communities Crimestoppers: 02/08

Metro Joint Police Commission: 02/13

The new, Motorola portable radios that were ordered last summer recently arrived and were assigned to sworn staff.

## OPERATIONS

Two significant winter weather events resulted in emergency declarations, response to many vehicle crashes and some squad car mechanical difficulties.

On Monday, January 29<sup>th</sup>, our department and K-9 team conducted a sniff operation on parts of the Kimberly High School facility and property. This was done at the request of school district staff. The primary goal of this operation is to detect any illegal drugs that may be on the property. We usually participate in this type of operation twice a school year.

Officers continue to address issues relating to disturbances and drugs at the Quality Inn – 761 Truman St. During one incident a subject damaged a second story window jumping out to evade officers. Drone teams and K9 teams from Grand Chute and Outagamie County assisted with apprehension efforts of this subject. Below is a list of calls / incidents at that business since January 1, 2023.

## Monthly Activity

Below is a three-month comparison for calls for service in the Village of Kimberly.





# FOX VALLEY METRO POLICE DEPARTMENT

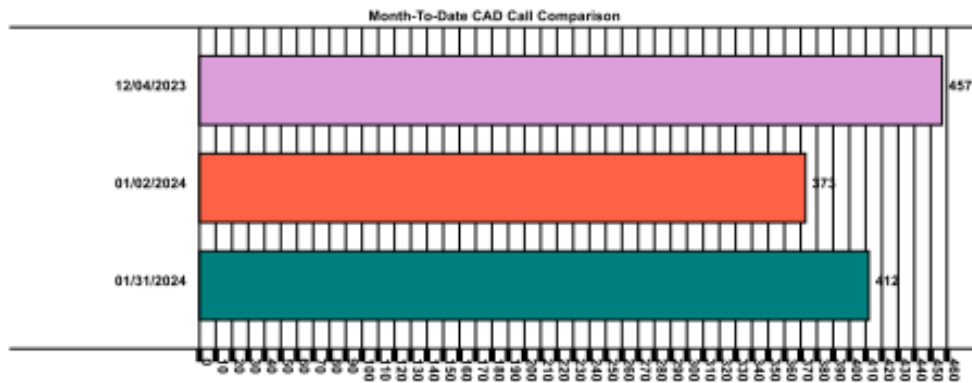
Month-to-Date CAD Call Detail

## Month-To-Date CAD Received Calls

Call Nature	01/03/2024	12/05/2023	1 mo %	11/06/2023	2 mo %
	to 01/31/2024:	to 01/02/2024:	change:	to 12/04/2023:	change:
911 Misdeal	22	19	15.8%	15	46.7%
Abandoned Vehicle	0	1	-100.0%	1	-100.0%
Abdominal D-David Response	0	1	-100.0%	0	N/A
Accident in a Parking Lot	2	3	-33.3%	3	-33.3%
Accident with Scene Safety	2	0	N/A	1	100.0%
Animal Bite	0	0	N/A	1	-100.0%
Animal Call	8	9	-11.1%	6	33.3%
Assist Citizen or Agency	16	24	-33.3%	28	-42.9%
Back Problem A-Adam Response	1	2	-50.0%	2	-50.0%
Back Problem C-CharlesResponse	1	0	N/A	0	N/A
Bicycle Stop	0	2	-100.0%	0	N/A
Bleeding D-David Response	0	3	-100.0%	1	-100.0%
Breathing Problem C-Charles	2	0	N/A	0	N/A
Breathing Problem D-David	3	2	50.0%	1	200.0%
Business Check	1	0	N/A	0	N/A
Carbon Monoxide Alarm	0	1	-100.0%	2	-100.0%
Chest Complaint A-Adam	0	0	N/A	1	-100.0%
Chest Complaint C-Charles	0	1	-100.0%	0	N/A
Chest Complaint D-David	3	0	N/A	4	-25.0%
Choking D-David Response	0	1	-100.0%	0	N/A
Civil Matter Assist	1	0	N/A	0	N/A
Civil Process	6	5	20.0%	9	-33.3%
Crime Prevention	10	10	0.0%	21	-52.4%
Damage to Property	2	3	-33.3%	4	-50.0%
Diabetic Issue A-Adam	0	1	-100.0%	0	N/A
Disturbance	5	8	-37.5%	6	-16.7%
Domestic Disturbance	3	3	0.0%	0	N/A
Drug Complaint	1	0	N/A	1	0.0%
Emergency Committal	1	0	N/A	1	0.0%
Fainting C-Charles	0	1	-100.0%	1	-100.0%
Falls A-Adam Response	4	3	33.3%	3	33.3%

Falls B-Boy Response	2	0	N/A	4	-50.0%
Falls D-David Response	2	0	N/A	2	0.0%
Fire Alarm Commercial	2	1	100.0%	3	-33.3%
Fire Alarm Residential	1	0	N/A	1	0.0%
Follow Up	10	7	42.9%	18	-44.4%
Fraud Complaint	1	1	0.0%	2	-50.0%
Graffiti Complaint	0	1	-100.0%	0	N/A
Harassment	2	3	-33.3%	3	-33.3%
Hazard in Roadway	4	1	300.0%	4	0.0%
Heart Problem C-Charles	0	0	N/A	2	-100.0%
Heart Problem D-David	1	1	0.0%	0	N/A
Jail GPS Checks	11	9	22.2%	16	-31.2%
Juvenile Complaint	0	3	-100.0%	5	-100.0%
K9 Assist	1	0	N/A	0	N/A
Law Alarms - Burglary Panic	3	1	200.0%	3	0.0%
Lost or Found Valuables	3	1	200.0%	2	50.0%
Medical Assistance No Injury	5	5	0.0%	12	-58.3%
Medical Pre-Alert	2	4	-50.0%	4	-50.0%
Motorist Assist	9	4	125.0%	5	80.0%
Noise Complaint	2	0	N/A	2	0.0%
Ordinance Violation	10	13	-23.1%	13	-23.1%
Overdose C-Charles	0	1	-100.0%	0	N/A
PNB B-Boy Response	0	1	-100.0%	0	N/A
Parking Enforcement	7	12	-41.7%	14	-50.0%
Parking Request	0	2	-100.0%	0	N/A
Pregnancy D-David	0	0	N/A	1	-100.0%
Reckless Driving Complaint	5	3	66.7%	3	66.7%
Restraining Order Tracking	0	2	-100.0%	0	N/A
Runaway Juvenile	5	0	N/A	0	N/A
Scam	1	0	N/A	1	0.0%
School Safety	37	29	27.6%	35	5.7%
Seizure A-Adam Response	0	0	N/A	1	-100.0%
Seizure D-David Response	1	0	N/A	0	N/A
Sex Offense	1	0	N/A	0	N/A
Sick A-Adam	3	2	50.0%	4	-25.0%
Sick C-Charles	3	3	0.0%	3	0.0%
Sick D-David	0	0	N/A	2	-100.0%
Stroke C-Charles	0	4	-100.0%	1	-100.0%
Structure Fire Smoke or Flame	0	1	-100.0%	0	N/A
Suspicious Incident	12	9	33.3%	10	20.0%
Suspicious Person	2	3	-33.3%	2	0.0%

Suspicious Vehicle	9	4	125.0%	12	-25.0%
Testing Only	0	0	N/A	1	-100.0%
Theft Complaint	2	1	100.0%	6	-66.7%
Theft of Automobile Complaint	0	3	-100.0%	0	N/A
Traffic Enforcement	6	0	N/A	2	200.0%
Traffic Stop	99	82	20.7%	112	-11.6%
Transport	1	0	N/A	0	N/A
Traumatic Injuries B-Boy	0	1	-100.0%	0	N/A
Trespassing	2	0	N/A	0	N/A
Unconscious D-David	1	3	-66.7%	2	-50.0%
Unconscious E-Edward	0	0	N/A	1	-100.0%
Unlocked or Standing Open Door	0	1	-100.0%	0	N/A
Vehicle Accident	18	5	260.0%	9	100.0%
Vehicle Lockout	4	3	33.3%	1	300.0%
Violation of Court Order	3	3	0.0%	0	N/A
Wanted Person or Apprehension	2	3	-33.3%	3	-33.3%
Welfare Check	22	33	-33.3%	18	22.2%
Wire Down	1	1	0.0%	0	N/A





# Department Report

To: Village Board  
From: Greg Ulman | Director of Public Works/Zoning Administrator  
Date: February 5, 2024  
Re: Public Works Monthly Report

---

## HIGHLIGHTS FOR JANUARY

- Had 3 plowable events for the month, in which the latest storm left us with temperatures so low the salt could not work. The street department was busy scraping off ice with heavy equipment.
- We purchased a John Deere backhoe and concrete buster from Brooks Tractor. It is scheduled to arrive in spring of this year.
- We moved myself, Holly, and Bill out of the street department and now have our offices set up in the senior center.
- Crews are busy finishing up clearing out the street department and moving everything to the Little Chute location.
- Crews have been filling potholes from our short plowing season.
- Speedy Clean continues to do routine cleanings on Linda St.

## TOP PRIORITIES FOR FEBRUARY

- Greg Ulman will be attending the Wisconsin Concrete Expo in Madison on February 15<sup>th</sup> and 16<sup>th</sup>.
- Asbestos abatement will happen around February 7<sup>th</sup> at the street department building.
- The street department will have officially moved to Little Chute starting February 5<sup>th</sup>.

- Present the 90% plans for our new street/parks facility to the Village Board and plan on going to bid on the project shortly after.

## UPCOMING EVENTS

- Holly Femal and I will be working on an application packet to have the Village of Kimberly be a Green Tier Community Participant. This will open us up to select state grants and funding.
- Before the street department building is demolished, and if possible, I have extended an invite to local emergency services to see if they would like to use the building for training purposes.



Month		Cost/ton	\$54.00						\$54.00		\$36.00									
\$0.00 Solid Waste Summary																				
DATE	Ticket #	TRUCK	Automated Garbage Weight	COST	Business & Parks Dumpster Collection Weight	COST	Large Item Collection Weight	COST	Sweepings Weight	COST	Yard Waste Weight	COST	Tires Weight - Free Collection	Village Streets, Library, Complex Recycle Weight - No Charge	Estimated Leaves Collected - Yards	Total Cost				
01/02/24	843123	80		\$ -		\$ -		\$ -		\$ -	800	\$ 14.40				\$ 14.40				
01/02/24	843156	32	14060	\$ 379.62		\$ -		\$ -		\$ -		\$ -				\$ 379.62				
01/02/24	843183	80		\$ -		\$ -		\$ -		\$ -	1040	\$ 18.72				\$ 18.72				
01/02/24	843293	80		\$ -		\$ -		\$ -		\$ -		\$ -				\$ -				
01/02/24	843305	32	6480	\$ 174.96		\$ -		\$ -		\$ -		\$ -				\$ 174.96				
01/03/23	843503	32	11000	\$ 297.00		\$ -		\$ -		\$ -		\$ -				\$ 297.00				
01/03/24	843670	32	9920	\$ 267.84		\$ -		\$ -		\$ -		\$ -				\$ 267.84				
01/04/24	843930	32	11960	\$ 322.92		\$ -		\$ -		\$ -		\$ -				\$ 322.92				
01/04/24	844065	32	7220	\$ 194.94		\$ -		\$ -		\$ -		\$ -				\$ 194.94				
01/05/24	844289	32	1780	\$ 48.06		\$ -		\$ -		\$ -		\$ -				\$ 48.06				
01/09/24	845272	32	18400	\$ 496.80		\$ -		\$ -		\$ -		\$ -				\$ 496.80				
01/10/24	845385	32	17540	\$ 473.58		\$ -		\$ -		\$ -		\$ -				\$ 473.58				
01/10/24	845415	32	4320	\$ 116.64		\$ -		\$ -		\$ -		\$ -				\$ 116.64				
01/11/204	845605	32	18120	\$ 489.24		\$ -		\$ -		\$ -		\$ -				\$ 489.24				
01/11/24	845780	32	12860	\$ 347.22		\$ -		\$ -		\$ -		\$ -				\$ 347.22				
01/16/24	846262	49		\$ -		\$ -		\$ -		\$ -		\$ -				\$ -				
01/16/24	846336	32	13560	\$ 366.12		\$ -		\$ -		\$ -		\$ -				\$ 366.12				
01/16/24	846406	32	6480	\$ 174.96		\$ -		\$ -		\$ -		\$ -				\$ 174.96				
01/17/24	846552	32	10540	\$ 284.58		\$ -		\$ -		\$ -		\$ -				\$ 284.58				
01/17/24	846680	32	8060	\$ 217.62		\$ -		\$ -		\$ -		\$ -				\$ 217.62				
01/18/24	846846	32	9280	\$ 250.56		\$ -		\$ -		\$ -		\$ -				\$ 250.56				
01/19/24	847024	32	7640	\$ 206.28		\$ -		\$ -		\$ -		\$ -				\$ 206.28				
01/23/24	847857	32	16280	\$ 439.56		\$ -		\$ -		\$ -		\$ -				\$ 439.56				
01/23/24	847973	32	8000	\$ 216.00		\$ -		\$ -		\$ -		\$ -				\$ 216.00				
01/24/24	848143	32	12960	\$ 349.92		\$ -		\$ -		\$ -		\$ -				\$ 349.92				
01/24/24	848260	32	10180	\$ 274.86		\$ -		\$ -		\$ -		\$ -				\$ 274.86				
01/25/24	848448	32	10980	\$ 296.46		\$ -		\$ -		\$ -		\$ -				\$ 296.46				
01/26/24	848658	32		\$ -	6240	\$ 168.48		\$ -		\$ -		\$ -				\$ 168.48				
01/29/24	849147	49		\$ -		\$ -	6060	\$ 163.62		\$ -		\$ -				\$ 163.62				
01/30/24	849403	49		\$ -		\$ -	7080	\$ 191.16		\$ -		\$ -				\$ 191.16				
01/30/24	849497	32	15240	\$ 411.48		\$ -		\$ -		\$ -		\$ -				\$ 411.48				
01/30/24	849658	32	7280	\$ 196.56		\$ -		\$ -		\$ -		\$ -				\$ 196.56				
01/31/24	849804	49		\$ -		\$ -	3620	\$ 97.74		\$ -		\$ -				\$ 97.74				
01/31/24	849850	32	12540	\$ 338.58		\$ -		\$ -		\$ -		\$ -				\$ 338.58				
				\$ -		\$ -		\$ -		\$ -		\$ -				\$ -				
				\$ -		\$ -		\$ -		\$ -		\$ -				\$ -				
				\$ -		\$ -		\$ -		\$ -		\$ -				\$ -				
				\$ -		\$ -		\$ -		\$ -		\$ -				\$ -				
				\$ -		\$ -		\$ -		\$ -		\$ -				\$ -				
				\$ -		\$ -		\$ -		\$ -		\$ -				\$ -				
<b>TOTALS</b>				<b>134.31</b>	<b>\$ 7,632.36</b>	<b>3.12</b>	<b>\$ 168.48</b>	<b>8.38</b>	<b>\$ 452.52</b>	<b>0.00</b>	<b>\$ -</b>	<b>0.92</b>	<b>\$ 33.12</b>	<b>0.00</b>	<b>0.00</b>	<b>\$ 8,265.94</b>				
			Tons			Tons		Tons		Tons		Tons		Tons	Tons	Yards				

January Building Permit & Fees Report					
Permit Category		Monthly Summary			
Category Prefix	Category Name	Value	Fees Collected Acct 01-44300-00	Number of Permits / Structures	Number Dwelling Units
<b>Residential Building</b>					
100	New Single Family	\$1,371,730.00	\$900.00	2	4
110	New Two Family	\$0.00	\$0.00	0	0
120	New Multi-Family	\$0.00	\$0.00	0	0
130	Residential Additions	\$26,000.00	\$66.00	1	0
140	New Accessory Buildings	\$0.00	\$0.00	0	
141	Addn Accessory Bldg	\$0.00	\$0.00	0	
150	Interior Alterations	\$36,500.00	\$120.00	3	
151	Exterior Alterations	\$0.00	\$0.00	0	
160	Decks/Patios	\$0.00	\$0.00	0	
170	Fences	\$0.00	\$0.00	0	
180	In-Ground Pools	\$0.00	\$0.00	0	
181	Above Ground Pools	\$0.00	\$0.00	0	
190	Raze Residential	\$0.00	\$168.00	1	
<b>Sub-Total Residential Building</b>		<b>\$1,434,230.00</b>	<b>\$1,254.00</b>	<b>7</b>	<b>4</b>
<b>Commercial &amp; Industrial Building</b>					
200	New Buildings	\$425,000.00	\$150.00	1	
210	Additions	\$0.00	\$0.00	0	
220	Interior Alterations	\$0.00	\$0.00	0	
221	Exterior Alterations	\$0.00	\$0.00	0	
230	Signs	\$9,500.00	\$25.00	1	
240	Raze Com'l/Ind	\$0.00	\$0.00	0	
<b>Sub-Total Commercial/Industrial Building</b>		<b>\$434,500.00</b>	<b>\$175.00</b>	<b>2</b>	
<b>Electric</b>					
300	Residential Services	\$0.00	\$0.00	0	
310	Residential Alterations	\$1,850.00	\$50.00	2	
320	Commercial/Industrial Services	\$0.00	\$0.00	0	
321	Commercial/Industrial Alterations	\$0.00	\$0.00	0	
<b>Sub-Total Electric</b>		<b>\$1,850.00</b>	<b>50</b>	<b>2</b>	
<b>HVAC</b>					
400	Residential Heating	\$10,127.00	\$50.00	2	
401	Residential AC	\$0.00	\$0.00	0	
402	Residential - Both	\$9,000.00	\$44.00	1	
410	Com'l & Ind Heating	\$0.00	\$0.00	0	
411	Com'l & Ind AC	\$0.00	\$0.00	0	
412	Com'l & Ind - Both	\$0.00	\$0.00	0	
420	Other	\$0.00	\$0.00	0	
<b>Sub-Total HVAC</b>		<b>\$19,127.00</b>	<b>\$94.00</b>	<b>3</b>	
<b>Plumbing</b>					
500	Residential Laterals	\$0.00	\$0.00	0	
501	Residential Alterations	\$21,150.00	\$120.00	3	
510	Com'l & Ind Laterals	\$0.00	\$0.00	0	
511	Com'l & Ind Alterations	\$1,011,000.00	\$1,125.00	2	
512	Other	\$0.00	\$0.00	0	
<b>Sub-Total Plumbing</b>		<b>\$1,032,150.00</b>	<b>\$1,245.00</b>	<b>5</b>	
<b>Permit Totals</b>		<b>\$2,921,857.00</b>	<b>\$2,818.00</b>	<b>19</b>	<b>4</b>
<b>Miscellaneous Fees</b>			<b>Fees Collected</b>	<b>Number</b>	
UDC Seals			\$70.00	2	
Parkland Dedication Fee			\$2,000.00	2	
Grade Fee			\$150.00	2	
VoK Sanitary Sewer Connection Fee			\$1,900.00	2	
HOVMSD Sanitary Sewer Connection Fee			\$6,060.00	2	
Storm Water - Erosion Control Permits			\$0.00	0	
Admin Fee			\$0.00	0	
Erosion			\$0.00	0	
Storm Sewer Fee			\$0.00	0	
<b>Total Miscellaneous Fees</b>			<b>\$10,180.00</b>		
<b>Total All Fees</b>			<b>\$12,998.00</b>		



# Department Report

To: Village Board  
From: Holly Femal | Community Enrichment Director  
Date: February 5<sup>th</sup>, 2024  
Re: Community Enrichment Director's Report

---

## JANUARY HIGHLIGHTS

### **PARKS**

- Parks staff continue to clean and organize parks supplies and equipment in preparation for moving from the Street and Parks building before the end of January.
- Parks crew supported the street department's snow cleanup efforts after the January blizzard as well as clearing all trails and public walks.
- Despite the boards being up and installed for the ice rink, it was determined we didn't have a span of temperatures to allow for the rink to be flooded and frozen for more than a couple of days' time. We are going to hold on to the liner and use it for the 2024 season instead.
- The kickboard on the Sunset baseball diamond bleachers are being re-installed and look much better.
- New signage has been installed at the boat launch with the ladder install to come when ice is out.
- New bleachers have been purchased for the youth diamond's approved CIP replacement project. The old bleachers will be disassembled with some pieces scrapped and some pieces saved for future picnic table construction. Bleachers are scheduled for install before spring softball.

### **RECREATION**

- We are working on the 2024 program guide including scheduling food trucks, arranging contracts, scheduling events, and coordinating between departments. We hope to have something published electronically in February as well as launch our annual hiring campaign in February as well.
- Baseball registration is open with a few pushes out to social media, one mass email to all 2023 participants, and a flyer sent to the school district to share. Registrations are coming in steadily. Early bird prices end at the end of February with registration closing at the end of March.
- We are looking for program instructors – CED would love to hear from people who want to teach classes!

## **EVENTS AND OUTREACH**

- CED attended WPRA with sessions on park shelter construction, park design awards, lifeguard training, master planning, new idea generation processes and so much more. Thank you for the opportunity to attend this continuing education conference.
- Office staff have been working through starting the annual solicitation process for KimTalk ads with the rec t-shirt solicitation process to begin in February.
- The Spring Kim Talk was put together in January for a mid-February publication date.

## **TOP PRIORITIES FOR FEBRUARY**

- Program Guide
- Start Hiring
- Mail out the KimTalk
- Papermill Run Trail railings.
- Verhagen Park Fundraising
- BID process for Upper Diamond Ballfield Lights
- Cooperative long range master planning for lower diamond facility.



# Department Report

To: Village Board  
From: Holly Selwitschka | Library Director  
Date: February 2024  
Re: Library Report



## JANUARY HIGHLIGHTS

- The library launched a Winter Reading Incentive program for all ages. The theme is Warm Up to Winter.
- Thanks to Brown County Library's new East Side Branch, we have some new-to-us shelving units

## TOP PRIORITIES FOR FEBRUARY

- Winter Programs
- New events including a Solar Eclipse program and Big Kids Storytime

## UPCOMING EVENTS

**Warm Up To Winter Reading Incentive Program** – Warm Up to Winter with our Winter Reading Program for children, teens, and adults January 15 through February 17. Pick up a BINGO sheet at the Kimberly Library and start completing reading and other activities to earn a chance to win prizes. Complete 5 activities in a row to make a BINGO (vertical, horizontal, and diagonal). You can earn up to four BINGOs on your card. Each BINGO equals a prize entry. Go for blackout to earn an additional entry. You may substitute 30 minutes of reading for any of the activities. One card per person. All entries due by February 17.





**Tiny Art Show: An Adult Community Art Show** – On display now, the Tiny Art Show runs from Jan – Feb 2024 with masterpieces returned to artists the first week of March.

**Fox Cities Book Festival Community Read Activity: Art Workshop with Neo Medina at the Trout Art Museum – Thursday, February 15 @5:30-8:30pm; also offered Saturday, February 17 @9:30am-Noon.** The National Endowment for the Arts Big Read, Fox Cities Book Festival, and Trout Museum of Art present an Art Workshop with Neo Medina, Loteria: a game of community created through our own stories



To get ready for the NEA Big Read author visit, we invite you to this FREE Loteria-inspired art workshop with artist Irineo Medina. All skill levels welcome. Completed works will be displayed as a community art piece at the Fox Cities Performing Arts Center on April 5th during the NEA author event with Patricia Engel.

RSVP Required. Register for your selected date at [troutmuseum.org/workshops/](https://troutmuseum.org/workshops/).

NEA Big Read is a program of the National Endowment for the Arts in partnership with Arts Midwest.

**Take Your Child to the Library Day Concert – Saturday, February 3 @10-11am** It's Take Your Child to the Library Day! Celebrate and cure your cabin fever with a fun concert for all ages! Special guest musician/accordionist Micah Sommersmith of Neenah will present original and sing-along songs to get kids up and dancing. There will also be a drop-in craft for kids from 9-noon. Today would be a great day to get a library card, browse our collection, learn about our e-resources, and discover all the great things happening at Kimberly Library!

**Crafternoons: Drop in Craft Circle (for adults) – Monday, February 5 @12:30-2pm** Work on your current knitting, stitching, beading, painting, felting (or other) project at this informal craft circle. Coffee provided. This program takes place on the first Monday of the month. Stay for as long or as little as you want.

**Chocolate is My Valentine: A Tasting Event for Adults – Monday, February 5 @6-7pm** Adults can register to join us for a trip around the world in chocolate. Call the library 920-788-7515 to register. Registration opens on Jan 15th at 9:00AM.

**LitFix Book Club – Meets the 1<sup>st</sup> Thursday of each month @10am;** In Person @ the Kimberly Public Library. March 8: "The Violin Conspiracy" by Brendan Slocumb

**Evening Book Club for Adults – Tuesday, February 20 @5-5:45pm** Join us for this new adult book club in the EVENING. Come after work in your scrubs. Come with an afterwork snack. Take a break from your kids. All adults welcome. We will discuss "Saturday Night at the Lakeside Supper Club" by J. Ryan Stradal. The author will make an appearance at Fox Cities Book Festival on April 6.

**Writer's Group – 2<sup>nd</sup> Thursday of each month at 10am-Noon** The writing group is for fun; no critiques are done, just support. At each meeting, members spend time writing from a prompt then share what they've written. There is no pressure to read your writing out loud, just encouragement.

**Senior Movies – 2<sup>nd</sup> Thursdays @12:30pm** Come for the popcorn. Stay for the movie! The senior movie matinee begins at 12:30PM in the Evergreen Room. Call the library at 920-788-7515 to get the movie title. This month's selection is rated R and may contain scenes that may be disturbing to a sensitive viewer.

**Short Story Group Discussions - Tuesday, February 20 @10am** Short Story Group reads a classic and a contemporary short story then meets once a month to discuss what they read.

**Baby Stay and Play Story Times – Tuesdays in February @10-10:30am** Enjoy sweet stories, rollicking rhymes, and merry music perfect for babies up to 30 months and their parents/caregivers. Playtime included afterwards.

**Big Kids Afterschool Story Time: The Adventures of George the Germ with Author Heidi Meadows**

Author and nurse Heidi Meadows will be our special guest as she shares her book *The Adventures of George the Germ: What Are Germs?* Kids will learn about germs, healthy habits, and ways to help prevent themselves and others from getting sick. Fun activities will be included. Spread the word, not the germs!

**Family Story Time – Wednesdays in February @ 10-10:30am** Enjoy classic and newer picture books plus music and learning games during this fun story time geared for preschoolers and their parent/caregiver. No food during story time, please.

**Solar Eclipse: Sun and Moon Stories – Thursday, February 8 @ 4-4:45pm** A total solar eclipse will be happening two month from this date – April 8. Learn about what happens during an eclipse and enjoy a few stories featuring the sun and the moon followed by a craft. Participants will receive a pair of solar eclipse glasses to save for April. Great for ages 3-8 and their parents/caregivers.

**Play Date: Play-Doh and More – Friday, February 9 @9:30-11am** Play at the library with Playdoh, crayons, paint sticks, magnetic tiles, and more. Rotate through self-directed stations for a fun morning of exploration.

**Yarn Gnome Craft – Monday, February 12 @3:15-4pm** Make an adorable gnome using yarn in this drop-in after school craft time. For grades 4-8.

**Cookie Decorating for Teens – Tuesday, February 13 @4-5pm** For teens in grades 6-12. Learn decorating techniques to create amazing sugar cookies with talented Cookie Queen Krista. Registration is required and opens January 22. Call 920-788-7515.

**Memory Café, a collaboration of the Fox Valley Memory Project - 4<sup>th</sup> Wednesday of each month from 1:30-3pm;** In Person at the Kimberly Public Library/ Municipal Center Complex Community Room Memory Cafes are for those experiencing memory loss and their loved ones. For safety, all participants must attend with a partner.

**Leap Day Story Time – Thursday, January 29 @10-10:30am** It's Leap Day – that extra February day we get every four years. Celebrate with stories about things that leap followed by a related craft. Great for preschoolers and their parents/caregivers.

**Children's Craft and Trivia: Ancient Greece Edition – Tuesday, February 27 @4-5pm** Enjoy a fun afterschool time learning about Ancient Greece with trivia questions, then craft your own shield buttons. Recommended for ages 9-12. Registration is required and opens on January 29. Call the library at 920-788-7515 to register.

**Friday Reads - Every Friday @ 11am;** Virtual on Facebook Live – Hear about great book recommendations from Librarians Jill and Julie every week on facebook, then come into the library to check out the best ones!





# Department Report

To: Village Board  
From: Maggie Mahoney, Community Development Director  
Date: February 5, 2024  
Re: Community Development Report

---

## HIGHLIGHTS FOR JANUARY

- Blue at the Trails Development:
  - Site Plan review of single and townhomes completed and approved.
  - Brief meeting on revised schedule and benchmarks status and process on January 25—awaiting proposal of the revisions.
- USACE: A draft agreement and exhibits was exchanged between Village/Kimberlly Riverfront LLC and USACE. The appraisal information is not available. Draft revisions are pending. When agreed up on draft is ready it will be brought to the Board for consideration.

## TOP PRIORITIES FOR FEBRUARY

- Update Village website for development projects, including new drone video footage.
- Blue at the Trails Development:
  - The Village is awaiting proposed revisions to project timelines and benchmarks to consider for an agreement revision.
  - Groundbreaking on the first multi-unit townhomes and single-family homes is expected to begin February/March. Completion of these homes would be mid to late summer of 2024.
    - Groundbreaking of the 6-story 45 condo unit Fox Riverfront 870 Terra Blue court building will commence in late summer/fall of 2024. This will be the first of four planned riverfront condo buildings along with 4 multi-unit riverfront townhome buildings.
  - Continue discussions regarding riverfront scenic overlook along trail.
- USACE:
  - Continue to work with parties as needed on the preparation of the final draft agreement in principal.

- Working with WEDC on closing out the Community Development Investment Grant to ensure we receive the maximum funds available for the scenic overlook project. The Village has received ~\$185,000 of the \$250,000 grant to-date.
- Planning to schedule the CDA and KEDO meetings when 2022 audit is completed and updated proformas are available.
- Check-in with Kimberly Riverfront LLC/Midwest Expansion on status of developments and other matters.

## UPCOMING EVENTS

- Valley Transit Joint Development Update, Tuesday February 6 7:30am-9:00am at Bridgewood Conference Center.
- 2024 Economic Forecast: Expert Insights from Industry Leaders, Wednesday February 7, 2024 7:30-9:00am at Butte de Morts Country Club in Appleton. At this seminar, Nancy Johnshoy, CFA, Senior Vice President – Portfolio Manager & Market Strategist, will present vital economic data and a panel of local leaders will discuss economic trends in Northeast Wisconsin.
- Fox Cities Convention and Visitor Bureau Tourism Breakfast, Friday March 1, 2024 at Paper Valley Hilton.
- Heart of the Valley Chamber of Commerce annual community update, Tuesday April 23, 2024 at their building in Kaukauna.



# Department Report

To: Village Board  
From: Maggie Mahoney, Administrator  
Date: February 5, 2024  
Re: Administrator's Report

---

## HIGHLIGHTS FOR JANUARY

- Budget:
  - Completed individual meetings with department heads and budget managers to go over approved budget and CIP.
- Streets and Parks Facility Project:
  - Site Plan approved.
- Reviewed Request for Proposals for IT Managed Services, with decision on vendor to be made in early February.
- City of Kaukauna v. HOVMSD: Staff worked with legal counsel on material submittals for the hearing, which is set for 10:00am on February 21, 2024.
- Met with Outagamie County Highway department on January 29, 2024 on upcoming capital projects.
- Foreman Gerritts conducted a safety training on January 30, 2024 with Central Office personnel to go over fire alarms, emergency, and blue light protocols. Similar trainings will be conducted with the Street Department and Library as well to ensure all staff are trained.
- Review of current Special Assessment policy and process. Proposed revisions will be presented to the Board for discussion in February, currently planned for February 12.

## TOP PRIORITIES FOR FEBRUARY

- Budget:
  - Group meeting with all staff that deal with financial/budget functions to discuss various topics including monthly financial report access and usage to manage budgets, overall budget/account code changes, any changes to budgeting

methods and review/authorization processes, purchasing and general information on trust funds.

- Determine prior year project carryforward requests, which will be presented as a resolution or consideration by the Board.
- Anticipate reviewing information for the 2022 audit report so the final report can be presented.
- Streets and Parks Facility Project:
  - 90% plan review with the Board tentatively scheduled February 12. Bid would open ~February 14.
- Present proposals for IT Managed Services to the Board.
- Initial meeting for Pedestrian Enhancement Retrofit Program with Village staff, engineer and FVMPD to produce a plan and recommendations for this program, including any 2024 allocations, to be considered by the Board.
- Planning for annual all-staff training day with CVMIC – date TBD later in the spring.
  - Considering possibility of conducting this training off-site on April 19 when the generator is being installed.

## UPCOMING EVENTS

- Hearing for City of Kaukauna v. HOVMSD 10:00am on February 21, 2024.
- Municipal Emergency Management Meeting February 21, 2024. Hosted by Outagamie County, a meeting for Emergency managers to implement some preparedness priorities identified in the Integrated Preparedness Plan IPP. Greg Ulman, Chief Hietpas, and I plan on attending.
- Welhouse Drive Reconstruction project Public Information Meeting on Tuesday, February 27 6:00pm-7:00pm in Village Hall Rick J. Hermus Council Chambers.
- WCMA 2024 Winter Conference February 28-March 1, 2024 in Elkhart Lake.



# Department Report

To: Village Board  
From: Jennifer Weyenberg | Clerk-Treasurer  
Date: February 5, 2024  
Re: Clerk-Treasurer  
Report

---

## HIGHLIGHTS

The central office team remained busy with top priority placed on collecting property taxes through January 31<sup>st</sup>, as well as issuing dog licenses and collecting water bills. Staff once again did an excellent job of balancing their daily collections which is not always easy with the phone calls, walk-ins, and other daily tasks. We will continue to collect taxes through Wednesday, February 7<sup>th</sup>.

Deputy Treasurer Sue Brown's last day with the village was January 4<sup>th</sup> and we sent her off with well-wishes on her new part-time adventure with the County. The deputy's duties of Accounts payable, Payroll, Licensing, and other tasks have been re-assigned to the Clerk-Treasurer, Deputy Clerk, and Utility Billing Clerk. The change of duties gave us an opportunity to review central office procedures and look for ways to improve our accuracy and efficiency.

The Elections Team tested and updated all of the Badger Books in preparation of training we held on February 1<sup>st</sup> with our poll workers.

### **Monthly Required Tasks/Statutes Completed:**

- \*Receipt of Quarterly General Transportation Aids
- \*First Quarter of FVMPF contract paid
- \*Tobacco Licensing filed with the State of WI
- \*W-2s/W-3 filed
- \*Annual Reconciliation processed with WRS
- \*1099s/1096 filed
- \*January 15<sup>th</sup> tax settlements calculated and processed
- \*Year-end software updates with Caselle