**REVISED**

Golden Rain Foundation

## SPECIAL INFORMATION TECHNOLOGY SERVICES COMMITTEE

# Agenda

Thursday, February 16, 2017
10:00 a.m.
Administration Conference Room B

1. **Call to Order/ Pledge of Allegiance**
2. **Roll Call/ Notice of Quorum**
3. **Chair's Announcements**
    a. Introduction of Guests and Staff

    Paul Lazear, Fully Functional Technology
    Todd Darr, Calnet Technology Group
    Craig Pollack, FPA Technology
    Randy Ankeny, Executive Director
    Daniel Fabian, ITS System Analyst
    Katya Lukina, Recording Secretary

4. **Shareholder/ Member Comments – Agenda Items Only**

    *(Limited to 3 minutes per person)*

5. **Old Business**
    a. RFP for ITS Support Services (pp. 1-6)
        i. Fully Functional Technology (pp. 7-14)
        ii. Calnet Technology Group (pp. 15-42)
        iii. FPA Technology (pp. 43-63)
6. **President's Comments**
7. **Shareholders/ Members Comments**

    *(Limited to 3 minutes per person)*

8. **Committee Member Comments**
9. **Adjournment**

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# Golden Rain Foundation

Request for Proposals for Information Technology Consulting Services

## General Information

| | |
|---|---|
| Project objective: | Hire an IT consulting/managed services company |
| Issuing organization: | Golden Rain Foundation<br>13531 St. Andrews Drive<br>Seal Beach, CA 90740 |
| RFP issued: | January 20th, 2017 |
| Proposals due by: | January 31st, 2017 |
| Contact information: | danielf@lwsb.com<br>(562) 472-1341 |

## Background

The Golden Rain Foundation (GRF) is a not for profit corporation/home owners association (HOA) which administers the shared Trust property and facilities owned by the 16 Mutual corporations. The Boards of the independent Mutual corporations directly manage each of the 16 respective Mutuals within Leisure World Seal Beach (LWSB). LWSB is an active adult living community located in Seal Beach, CA.

Each of the Mutuals has an elected, volunteer Board of Directors that manage the residential property. It also elects volunteer representation of the GRF Board of Directors. The GRF Board makes policies and administers the Trust property for the Mutuals. They also oversee the functions of the approximately 250 persons who are employed by the GRF. There is a full-time Executive Director who oversees the departments serving the community. These departments are: Administration, Community Facilities, Finance, Golden Rain News, Human Resources, IT Services, Mutual Administration, Recreation, and Security.

The GRF Board operates through the Executive Committee and 8 standing committees: Architectural Design Review, Finance, Information Technology Services, Mutual Administration, Physical Property, Publications, Recreation, and Security, Bus and Traffic. The Committees work to facilitate cooperative community living within Leisure World.

## Overview

The Information Technology Services Committee is requesting proposals for IT consulting services. The IT consulting company's primary responsibility will be to assess the company's information technology infrastructure, provide recommendations for security, maintenance, and system improvement, and assist the ITS department with elevated issues.

The on-site ITS department consists of the ITS Systems Analyst and ITS Technician. The ITS department has the responsibility for the implementation, maintenance, operations, and expansion of all information processing and communication systems. The department's objective is to support staff and ensure all technical hardware and

systems are functioning correctly. The department is also responsible for the flow of information among staff members, the board/committees, and to the residents via the community website(s) and various software systems.

## Project Goal & Target Audience

All communications will be between the on-site ITS department and IT consulting company to ensure both party's goals align.

The GRF's goal is for the Foundation's systems to be in compliance with all information technology industry standards and be able to pass a standard IT audit. All operating systems and software should be patched and kept up-to-date, network secured with endpoint protection and firewalls, all user files/e-mails backed up, and other processes the consulting company recommends.

The on-site ITS department handles ~95% of technical and help desk inquiries from GRF staff. However, the IT consulting company must offer managed services to assist with the remaining ~5% of inquiries – mainly high level server any other issues the ITS department is unable to resolve.

Since the ITS department resolves most issues, managed services charged on an "as-needed" basis are preferred.

Business hours are 8:00 am to 4:30 pm. However, the Security department is always in operation so 24/7 support is required.

## Sitemap

Managed Systems:

- 118 computers (106 Windows 7, 12 MacOS)
- 14 Konica Copiers
- 147 Polycom Telephones (VoIP)
- 51 Tablets (5 Surface, 46 iPads)
- 75 Surveillance Cameras (World Eye Cam)
- 10 Surveillance Camera Servers
- 7 LPR Cameras
- 3 LPR Camera Servers
- 8 Open Wireless Hot Spots
- 7 Servers (Windows based)
- 3 Remote Networks (Main network is at Administration and provides wireless via antenna to the Library, Security office, and Service Maintenance Yard)
- 8 Patron Computers at Library
- 3 Patron Servers at Library
- 5 Paychex Time Clocks

Software/Services:

- Patch management: Solarwinds N-able + manual updates
- AV endpoint protection: Bitdefender
- File/e-mail back up: Dell AppAssure
- Firewall: Cyberoam

- Software: Adobe Cloud, Microsoft Suite, CRMs (Adapt, Axxerion), Databases (MySQL + Crystal Reports, Jenark), Microsoft Dynamics GP, DameWare, VMWare
- Servers: Windows Server 2003, 2008 (Active Directory, Exchange, SharePoint, SQL)
- Websites: WordPress – 1 main community website and 16 Mutual websites

## Services Required

- Patch management system
- AV endpoint protection (desktops, servers, e-mail)
- File backup (physical and cloud based)
- E-mail backup (physical and cloud based)
- Network assessment and penetration testing
- Software licensing
- Software support
- Server support and management

We are seeking a program to automatically update software and install Windows patches. We would also like to implement new endpoint protection software on all machines.

Consulting advice and assistance implementing these two systems will be needed.

## Upcoming Projects

- Upgrading/migrating all servers to Microsoft Server 2012/2016
- Re-wiring network locations
- Evaluating broadband and VoIP services
- Consolidate video surveillance system

Our servers are currently running Windows 2003 and Windows 2008. With 2003 no longer supported and 2008 on its way out, we'll need to migrate all Servers to the latest Server OS. The wiring at our network locations will need to be cleaned up as well.

## Proposals

Please include the following in the proposal:

- List of services the company provides
- Credentials and qualifications
- References and other companies currently associated with
- Contract terms and conditions
- Billing process details (hourly, monthly, etc.)
- Estimated rates / pricing

## Timeline

Proposals will be accepted until January 31st, 2017 at 4:30pm. If you have any questions regarding this RFP, please contact Daniel Fabian at (562) 472-1341 or danielf@lwsb.com.

We are looking to bring the IT consulting company on board as early as March 15th, 2017.

## Point of Contact

| Name | Title | E-mail | Phone |
|---|---|---|---|
| Daniel Fabian | ITS Systems Analyst | danielf@lwsb.com | (562) 472-1341 |
| Barry Holland | ITS Technician | barryh@lwsb.com | (562) 472-1338 |
| Randy Ankeny | Executive Director | randya@lwsb.com | (562) 472-1312 |

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IT Consulting & Managed Services Proposal for

# GOLDEN RAIN FOUNDATION

13531 St. Andrews Drive, Seal Beach, CA 90740

## PROJECT DESCRIPTION STATEMENT

Ongoing support and managed services agreement to maintain, secure, upgrade and support the Golden Rain Foundation network as enumerated below. This will include Tier 2 & Tier 3 tech support, security services, remote & onsite 24x7 incident response, certifications, audits, monitoring with regular reporting, phased upgrades and all required management services.

## PROJECT SCOPE

### SYSTEMS MANAGED:

- 118 computers (106 Windows 7 PC, 12 MacOS)
- 14 Konica Copiers
- 147 Polycom Telephones (VoIP)
- 51 Tablets (5 Surface, 46 iPads)
- 75 Surveillance Cameras (World Eye Cam)
- 10 Surveillance Camera Servers
- 7 LPR Cameras
- 3 LPR Camera Servers
- 8 Open Wireless Hot Spots
- 7 Windows-based Servers (2003/2008)
- 1 Main Network (Admin Bldg)
- 3 Remote Networks (Library, Security office, Service Maintenance Yard)
- 8 Patron Computers at Library
- 3 Patron Servers at Library
- 5 Paychex Time Clocks

### SOFTWARE/SERVICES:

- Patch Management: Solarwinds N-able + manual updates
- AV Endpoint Protection: Bitdefender
- File/E-Mail Backup: Dell AppAssure
- Firewall: Cyberoam
- Software: Adobe Cloud, Microsoft Office Suite, CRMs (Adapt, Axxerion), Databases (MySQL + Crystal Reports, Jenark), Microsoft Dynamics GP, DameWare, VMWare Servers: Windows Server 2003, 2008 (Active Directory, Exchange, SharePoint, SQL)
- Websites: WordPress, 1 main community website and 16 mutual websites

## SERVICES PROVIDED BY FFT

• Full Stack IT Services and support for all devices and software within the above scope are provided under this agreement. This includes comprehensive network support, security services, server support, user & desktop support, device/printing, network, WAN, VoIP, hosting support, website maintenance, security/camera.

  • Additional services offered by FFT include cabling, web hosting and design, email hosting, VoIP hosting, app development and software development and are billed separately.

• Remote & On-site support to interface and expand existing in-house IT support.

• 24x7 Phone & On-site response as required for Tier 2 Tech Support, Tier 3 Consulting & Tech Support, & IT Security Monitoring & Response.

• Comprehensive NOC/SOC Management

• Automated Patching, manual firmware and server updates.

• End of Life Management and Upgrade Pathing for all included systems.

• Full-time monitoring and regular checkups with reporting on mission-critical systems, incl. backups, servers, security audit, antivirus sweeps, power & servers.

## KEY PERSONNEL RESPONSIBILITIES

**Paul Lazear,** MCSE
Plazear@wearefft.com, (818) 207-2505
Co-Project Manager, FFT President

• Coordinate overall project from start to finish, ensuring that all milestones and deadlines are met.
• Keep clear lines of communication open with client.
• Attend all site meetings.
• Primary area of responsibility for network health, manage incident response, assess and recommend upgrades, overall management.

**James Wright,** FFT
Jwright@wearefft.com, (818) 800-5831
Co-Project Manager, FFT Head of Security & Technology

• Primary area of responsibility for high level server management, virtualization, security, security auditing, monitoring, network penetration testing.
• James is one of the foremost security consultants in CA, whose c.v. includes overseeing the FAA Western Region audit inclusive of LAX. He will personally oversee all audits, perform pen testing, and prepare security monitoring reports

## KEY PERSONNEL RESPONSIBILITIES

**Jonathan Dashe,** FFT
jdashe@wearefft.com, (586) 255-2202
Head of Support, FFT Head of Support

• Primary area of responsibility to ensure high availability, 24x7 response, ongoing maintenance

**Daniel Fabian,** GFR
daniel@lwsb.com
Client Point of Contact

• Ensure access to location and necessary equipment, including any necessary hardware or software.
• Provide necessary information including, but not limited to: gate & site authorization, passwords, security system, any existing network documentation or configuration notes, maps or diagrams.

## REFERENCES, PAST & CURRENT CLIENTS

### Education & Government

- Federal Aviation Administration
- City Of Glendale
- County of Orange
- Port of Los Angeles
- Orange County School of Performing Arts
- Los Angeles Homeless Services Administration
- Pomona College
- Field Research Corporation

### Banking, Finance, & Law:

- Phelps, Schwarz & Phelps Elder Law
- IndyMac Bank
- PennyMac Bank
- Athenaeum Capital Partners
- HGMG Law
- Griffin Capital
- Jerrold Rabin & Co.
- Chodos & Associates
- Total Financial Solutions

### Non-Profits & Policy:

- Convalescent Aid Society
- Wilshire Temple
- Otis Booth Foundation
- Elevate Leadership Club
- Children's Nature Institute
- Tribal Law & Policy Institute
- Vehicle Donations Processing Center

## REFERENCES, PAST & CURRENT CLIENTS

### Entertainment & Public Relations:

- IMAX
- Phelps
- Nina Stern PR (Barney & Teletubbies)
- The HQ (Carrie Underwood)
- VRLA (Virtual Reality Expo of Los Angeles)
- Tiltware (Online Poker)
- Hero Ventures
- Jake Berry Productions
- Starbreeze VR
- Marvel Entertainment
- Equilibrium Entertainment
- The Walking Dead VR
- RG Live
- Battalion PR

### White Glove IT:

- Family of Charles S. Munger (Berkshire -Hathaway)
- William H. Borthwick estate
- Morgan Stanley (Exec. Dir. Palmer Murray)

### Manufacturing & Retail:

- Matteo Home
- Kars-R-Us

### IT Management:

- IT Advantage
- Telco South Florida

### Healthcare:

- Vitas Healthcare
- Glendale Adventist Hospital

### Energy Sector:

- Griddy Energy
- GTherm Energy

### Construction & Architecture:

- David Hidalgo Architects
- Pinner Construction
- Level 3 Design

### Misc:

- Hosting.com
- Vanguard Protection
- Pacific Merchants Trading, Co.

## PROJECT DETAIL & PRICING

Initial setup will include setup and configuration required for ongoing support. This phase will include inventory and assessment, as well as establishing baselines.

| | HOURS | RATE | TOTAL | LINE ITEM |
|---|---|---|---|---|
| **MONTHLY** | | | | |
| Premier White glove consulting and engineering - Server management | 8 | 150 | 1200 | All required patching, optimization, management and regular maintenance. Tier two and Tier three support! |
| Premier White glove consulting and engineering - Desktop management | 8 | 100 | 800 | All required patching, optimization, management and regular maintenance. Tier two and Tier three support! |
| 24x7x365 Hour Premium Support | 8 | 100 | 800 | 1 Hour response time, guaranteed same day on site incident support. |
| Backup | 8 | 100 | 800 | Unlimited number of computers, with low, flexible pricing as storage requirements increase. |
| Cybersecurity / cyberhealth | 4 | 200 | 800 | Includes FFT's proprietary on-site network sensor, and periodic review of all services by our world-class Cybersecurity staff. |
| **ONBOARDING** | | | | |
| Installation of support software<br>Documentation<br>Project Assessment and Recommendations<br>Network & Security Assessment | 1 | 4500 | 4500 | One-time setup fee to prepare for remote support and assessment. |

## PLANNED PROJECTS

Note that for each of these projects a site survey and assessment will be required to give accurate pricing and scheduling information. All of these are expected to be completed in calendar year 2017.

- Upgrade network clients away from End of Life Windows 7
- Replace AV client with Webroot Endpoint Protection
- Server upgrades to virtualized Windows Server 2016
- Annual network penetration testing
- Wiring Cleanup
- Evaluate VoIP services
- Evaluate Broadband services
- Bring network to compliance with all information technology industry standards and be able to pass a standard IT audit
- Consolidate video surveillance system

## PAYMENT INFORMATION

Initial payment of $4,500 for the setup phase is due upon signed acceptance of Statement of Work. Monthly retainer of $4,400 and all additional hours invoiced monthly and are due upon receipt.

Additional work beyond the monthly retainer hours are billed at the standard rate for the corresponding service. Pricing for Tier 2 support is $100/hr, Tier 3 consulting $150/hr and security consulting $200/hr.

Work outside the scope of this agreement will be billed at the standard rate for the corresponding service. This includes problem resolution, tech support, security remediation and additional installations outside this scope of work that are completed during this scope of work.

## CHANGE ORDERS

All changes must be requested in writing and will be billed or credited at the rates.  Any changes will require a separate estimate signed and accepted by an authorized party.

This estimate is based on the most efficient process of execution, if the client requests the process to be altered, the project timeframe will be adjusted accordingly and the client will be responsible for any additional costs incurred.

**Credit card payments are subject to 4% surcharge.**

Fully Functional Technology will not be responsible for any loss of business; either direct or indirect, from lost calls or system failures, nor inconvenience to either employees or clientele.

## PERMITS & INSPECTIONS

Fully Functional Technology Inc forwards the costs of all city permits and inspections to the client including follow-up inspections and unforeseen changes to the permit costs.  If anything is called out by the inspector for repairs, the client will be responsible for any overages in labor and materials.

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Response to Request for Proposal

# Information Technology Consulting Services

January 31, 2017

Account Executive
Todd Darr

tdarr@calnettech.com
Phone: 714-263-1176
C: 949-275-8890

Our Business Partners:

Hewlett Packard Enterprise · Microsoft · DELL · ShoreTel · EMC² · Laserfiche · vmware

# Executive Summary

Cal Net Technology Group is the leading trusted provider of outsourced IT, cloud, security and unified communications solutions for organizations throughout the Los Angeles, Ventura and Orange county areas.

Through our TECManage, COManage, SYSManage, and unified communications services, Cal Net provides the highest caliber of partially and fully outsourced IT and UC support services through our onsite and remote delivery models.

For the Request for Proposals for Information Technology Consulting Services, Cal Net Technology Group is proposing to Golden Rain Foundation (GRF or CLIENT) a solution based on our SYSManage services, which include proactive systems management practices in which each server is updated with the necessary service packs and updates to secure the operating and anti-virus/spyware systems. All devices are continuously monitored for health and performance and Cal Net is alerted when potential issues arise, allowing our engineering team to resolve issues before they cause system outages. We are also notified of systems that fail after-hours, so that we can begin repairs and fix issues before they interfere with the next upcoming work day..

Cal Net also specializes in support for a variety of other industry verticals including education, state & local, manufacturing, financial, non-profit, legal, hospitality, technology, and many others. From the moment you contact Cal Net, our goal is to provide a superior quality experience with our team of technical experts across 18 different competency areas.

This document is the official response to GRF's Request for Proposal - Request for Proposals for Information Technology Consulting Services for January 31, 2017.


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Chatsworth, CA 91311
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# Qualifications and Experience of Firm, Including Subcontractors

Founded in 1995, Cal Net Technology Group is now one of the largest Business Technology Consulting Firms in Southern California according to the Los Angeles Business Journal. Cal Net has the largest MSP field engineering team in Southern California, employing over 100 engineers between Los Angeles and Orange Counties. Cal Net manages over 30,000 endpoints daily, and services over 1,500 clients annually. And we continue to grow!

With numerous awards to attest to our capabilities, including multi-year awards as an **INC 500/5000 Fastest Growing Business**, a **Laserfiche Winners Circle Integrator** member for 16 years, along with multi-year awards as a **Los Angeles Business Journal Best Places to Work** awards, **LA Business Journal's IT Service Partner of the Year**, and accolades from our strategic partners including **Microsoft's 2013 Western Region SMB Partner of the Year**, **2014 & 2015 SouthWest Region Partner of the Year** and **ShoreTel's Gold Champion Partner**, we have proven to the business community that partnering with Cal Net Technology Group is good for business.

We are the only solution provider in Southern California that is both a Microsoft Gold Certified Partner and a ShoreTel Gold Champion Partner. This distinction assures organizations that we have expertise to integrate Microsoft business applications and ShoreTel IP telephony solutions to provide the absolute best integration for Unified Communication solutions for our clients.

Our Chatsworth office includes our HelpNet facility serving over 300 clients on a 24/7 basis. In addition, we have an office in Anaheim, and many of our 75 Engineers operate out of a number of territory-centered home offices such that no local client is more than minutes away from support.

Because of our wide engineer base, our clients benefit from "The Power of Many," being able to leverage 18 unique skill sets from our multiple teams of engineers.

We provide solutions in a wide range of areas including: Unified Communications, Virtualization, VDI, SharePoint and SQL programming, Managed Services, Cloud Services, Security, DR and Business Continuity, Wireless Infrastructure, Big Data, and more.

Among our engineers' certifications include: HP Networking MASE, HP Storage MASE, HP Server ASE, Ruckus WISE, Juniper Routing and Security, Microsoft Gold, Microsoft Silver, Palo Alto

We look forward to partnering with you to ensure your I.T. solutions enable you to realize the full potential of your organization.


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# Cal Net Technology Group Contacts

**CAL NET ENTERPRISES LLC DBA CAL NET TECHNOLOGY GROUP**
9420 Topanga Canyon Blvd. Suite 100,
Chatsworth, CA 91311.

### Chief Executive Officer

- James Hwang, jhwang@calnettech.com 818.721.4330

### President & COO

- Luca Jacobellis, ljacobellis@calnettech.com 818.725.5060

### Chief Technology Officer

- Randy Nieves, rnieves@calnettech.com 818.701.5753 x113

### Chief Financial Officer

- Tony Shepherd, tshepherd@calnettech.com

### Vice President of Sales

- Gavin Zimmer, gzimmer@calnettech.com 818.725.5071

**Key Personnel**

### James Hwang, CEO

As the Senior Vice President, James and his team is chartered with the responsibility to create and execute Cal Net's Managed Services Sales and Go-To-Market (GTM) strategy. Most importantly, James and his team is chartered to deliver the most exceptional client experience from the first inquiry! Previously, James led Field Sales and Engineering organizations at Hewlett-Packard and EMC and has also been involved in successful launches and subsequent acquisitions of small and mid-size technology ventures. James is a graduate of the US Military Academy at West Point.

### Luca Jacobellis, President & COO

For more than fifteen years, Luca has helped steer Cal Net's exponential growth as he oversees the service department and consistently introduces new technical capabilities to the team. A winner of the San Fernando Valley Business Journal's "40 under 40" award for leadership, Luca still enjoys experimenting with new technologies and designing ways to help businesses leverage those technologies into greater earnings.

### Randy Nieves, Chief Technology Officer

Randy's broad background in technology design, business, systems analysis, and ITIL serve him well in his role at Cal Net. Randy is responsible for managing and developing new products and services for Cal Net's portfolio, ensuring that our services remain current and continue to provide value across our customer base.

### Gavin Zimmer, Director of Business Development

In his leadership role, Gavin has more than doubled Cal Net's sales channel and guided its proactive approach to business. When not working, Gavin enjoys spending time with his wife and two children, playing golf, cooking, and appreciating single malt scotch.

### Ramsay Eltaher, Director of Technology Management

Ramsay brings over 15 years leading senior software, IT and management teams though all aspects of business operations and service delivery. He is experienced in developing high caliber teams within organizations and aligning them to their strategic business objectives. With Cal Net, he leads the influential team of seasoned vCIOs, Technology Managers and Senior Technical Architects through strategic analysis, systems design and management engagements.

### Cathy Dalgleish, Controller

Cathy is able to combine her specialties—accounting and computers—in her role as controller for Cal Net. She excels at providing accurate financial statements and insightful analytics so the management team can make informed business decisions.


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# Technology Implementation Methodology: Experience and Expertise

## Cal Net's Long History of Successful Projects

With vast experience in performing company-wide upgrades of business platform systems, Cal Net has developed a proven method of successfully accomplishing these projects.

Hundreds of companies have called upon Cal Net's specialized skills to help them with their migrations. I.T. Systems continue to evolve, and we have worked closely with our clients to improve their businesses by implementing the latest technology systems and features. This enables them to save on support costs, improve productivity and security and increase overall profitability. Our expertise covers the realm of the most vital project-based services that businesses today require:

- System Assessment, Analysis and
- Recommendation Server, Network and
- Workstation Platforms Messaging and
- Collaboration Data and Network Security
- Enterprise Content Management Systems
- High Availability and Disaster Recovery
- System and Operations Documentation
- Environmental Efficiency

## The Cal Net Technology Group Advantage

Cal Net fuses design, procurement, integration, documentation and services to deliver a complete technology solution that helps transform businesses by increasing profitability through Information Technology solutions.

We take the time to clearly understand your business, your corporate culture and your computing environment in order to become a true business partner – one who makes recommendations based on our diverse corporate experience and thorough understanding and knowledge of your environment.

During the process, we will exhibit high standards of professionalism, integrity and technical competence while remaining focused on this primary objective. Cal Net prides itself on its proven methodology in which thorough discovery, assessment and planning lead to solid recommendations for well-managed implementations.

Years of experience in hundreds of different environments combined with strong resident technological expertise provide a well-architected technology solution and implementation process. Our unique methodology identifies and solves the risk factors of a project before the project is started.

Every technology change has the potential of disruption to the daily functionality of the business. A poorly handled implementation can be extremely costly due to loss of productivity. Cal Net Technology Group is a company made up of "business professionals in technology" and clearly recognizes that the risks of a project need to be discovered first to be properly eliminated.


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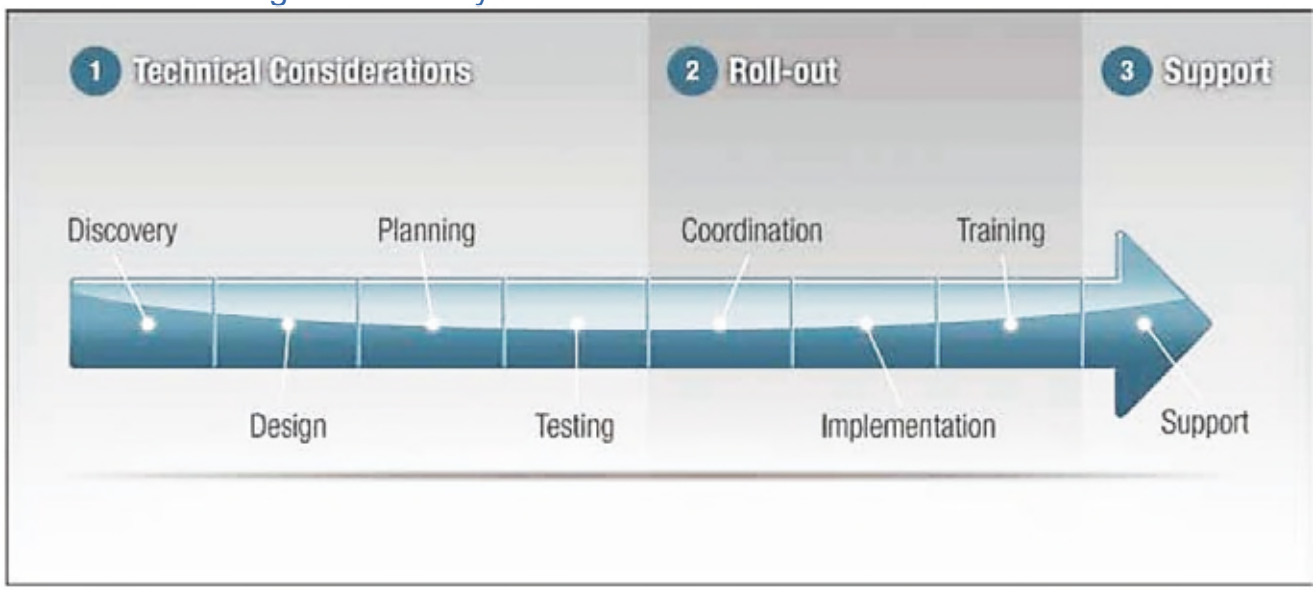
## Precision Planning and Delivery




For the **Technical Considerations**, Cal Net's Project Management staff begins by working closely with your management personnel to discover all of the systems that are currently in use which may be affected by the upcoming system changes. A new system is designed, architected, discussed, revised and documented to prepare a blueprint of the desired outcome. The entire project is broken down into discrete individual tasks which are planned step-by-step in order to transition the current environment into the future architecture, with the risks of outages and downtime minimized.

A carefully planned **Roll-out** usually means the difference between a smooth project and a total disaster. A poorly planned execution results in loss of productivity, end-user downtime and a generally negative perception of both the new system and the management. Cal Net possesses vast experience in keeping all project participants, department managers and end-users thoroughly informed during the course of the project. Thus the expectations of the implementation are always exceeded, and all considerations have been addressed to ensure that the transition to the new system happens as seamlessly as possible.

Upon completion of the implementation, a **Support Transition** occurs as Cal Net's project engineering staff prepares our support staff for the responsibility of maintaining the new systems. In most cases, our clients engage us on a customized managed services support program after the project's completion, in which Cal Net's staff continues to maintain, monitor and perform emergency troubleshooting services on an ongoing basis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# References

### Dignified Home Loans

1 Baxter Way,
Unit 120
Westlake, CA 91362

Vegard Lindas, Chief Technology Officer
(805) 267-7403
vegard@dignifiedhomeloans.com

### Biomed Development Corporation

3643 Lenawee Ave.
Los Angeles, CA 90016

Reiko Ruppel, V.P. of Finance
(424) 258-1815
rruppel@bioplate.com

### Edward Thomas Collection

Shutters on the Beach
1 Pico Blvd.
Santa Monica, CA 90405

Jodi Horowitz, Controller
(310) 581-7781
support00@etchotels.com

### Harvard-Westlake School

3700 Coldwater Canyon
North Hollywood, CA 91604

David Hartmann, Network Systems Engineer
(818) 487-5445 445
dhartmann@hw.com

### Talon International, Inc.

21900 Burbank Blvd., Suite #270
Woodland Hills, CA 91367

Cornelia Boylston
cboylston@talonzippers.com

### ADDITIONAL REFERENCES HAPPILY FURNISHED UPON REQUEST

For more information about Cal Net Technology Group and our Professional Services, please call Gavin Zimmer directly at 818-725-5071, gzimmer@calnettech.com, or visit us at http://www.calnettech.com

# RFP Responses

# Assessment

## Our Approach

Cal Net employs standardized methodologies and industry frameworks to ensure comprehensiveness, consistency, and quality. The following sections outline those that we leveraged as part of this assessment.

## IT Assessment Methodology

This assessment was conducted utilizing Cal Net's IT Assessment Methodology, which provided the phased process and checkpoints necessary for this report.

The following diagram provides a high-level outline of the IT Assessment Methodology:

## ARMS Framework

This assessment incorporated Cal Net's ARMS Framework, which provides a reliable and thorough platform for assessing people, processes, and systems as they relate to technology within the organization.

The following diagram provides a high-level outline of the ARMS Framework:


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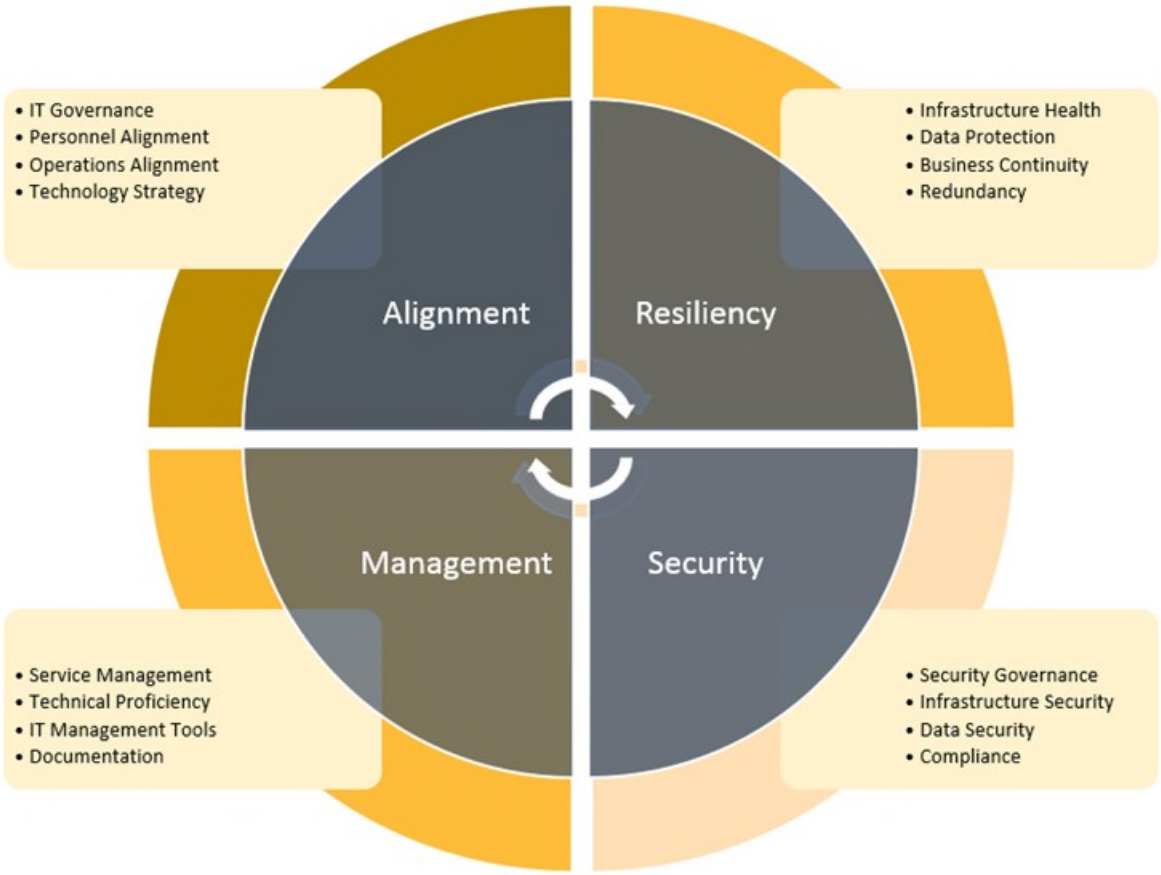


## ITIL Framework

The IT Infrastructure Library (ITIL) is the most widely accepted approach to IT service management worldwide. ITIL can help organizations leverage IT to realize business change, transformation and growth objectives. Cal Net leverages ITIL as the model to managing technological operations within an organization.

Cal Net understands that achieving 100% adherence to the ITIL Framework is not needed in all organizations, in this regard we have adopted select best practices for this assessment and adapted them to the organization.

The following diagram illustrates the primary categories of the ITIL v3 framework:


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## Scope of Work

Cal Net will provide expertise to assess client's IT infrastructure. As a result of its findings, Cal Net will author a comprehensive assessment that will provide recommendations for remediation and improvement.

The assessment will be modeled to the ARMS framework, examining twelve (12) principal areas of your organization's technological operations, organized into three (3) categories:

| Resilience | | Management | | Security | |
|---|---|---|---|---|---|
| Infrastructure Health | ✓ | Service Management | ✓ | Security Governance | ✓ |
| Data Protection | ✓ | Technical Proficiency | ✓ | Infrastructure Security | ✓ |
| Business Continuity | ✓ | IT Management Tools | ✓ | Data Security | ✓ |
| Redundancy | ✓ | Documentation | ✓ | Compliance | ✓ |

In addition, an ITIL v3 best practices cross-check exercise will be conducted.

Cal Net will employ its IT Assessment Methodology for this engagement:

**Phase 1:** Planning → **Phase 2:** Discovery → **Phase 3:** Analysis → **Phase 4:** Recommendation


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The delivery of this engagement is expected in four (4) phases with one (1) deliverable (TBD).

## Activities in Scope

### Phase 1) Planning

The initial phase establishes the expectations and guidelines for the assessment and provides for understanding the organization and scheduling the subsequent phases.

- Project kickoff
- Organization drivers and goals
- Stakeholder needs and objectives
- Compliance requirement identification
- Deliverable review and communication
- Resource scheduling

Cal Net will provide ongoing project management and communication through this engagement.

### Phase 2) Discovery

This phase of the engagement is focused on information gathering.

- Systems and environment discovery
    - Data center and server room facility tours
    - Infrastructure and application review
    - Documentation and present method of operation review
    - IT personnel capabilities
- Compliance interpretation
    - Industry requirements and best practices
    - Regulation and standards requirements
    - Organizational policy standards
    - Vendor and client requirements and guidelines
- Data collection and consultation (interviews, workshops & ad hoc)
    - Policies and procedures review
    - Roles and responsibilities review
    - Budget and technology constraints review
    - Organizational alignment
    - Desired future state capture
- Data review, analysis and preliminary analysis


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### Phase 3) Analysis

As a result of the previous phase, this phase will analyze the findings and evaluate recommendations.

- Gap, risk and capability analysis
  - Compliance verification
  - Policy evaluation
  - Best practice review
  - Organizational alignment
  - Personnel evaluation
- Infrastructure design
  - Health review
  - Resiliency analysis
  - Architecture review
- Technology alignment analysis
  - IT policies and procedures review
  - Security posture assessment

### Phase 4) Recommendation

As a result of the previous phases, Cal Net will research and develop the recommendations to meet future-state goals.

- Remediation identification
  - Compliance and best practice adherence
  - Alignment and personnel suggestions
  - Immediate priorities with cost analysis
- Future-state design and recommendations
  - Benchmark to similar organizations
  - Industry and market roadmap
  - Security, scalability, availability and performance considerations
- Documentation and presentation
  - Deliverable preparation and editorial
  - Draft submission, review and comment
  - Final revision delivery
  - Presentation and project wrap-up

Cal Net will finalize documentation through delivery of the [D1] Technology Infrastructure Assessment and accompanying presentation of final recommendations.

## Technologies in Scope

- Overall network and infrastructure architecture
- Perimeter security


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- Systems security
- Network topology and speed
- Servers, capacity, performance
- Routers and voice gateways
- Switches
- Video equipment
- Call center infrastructure
- Database configuration

## Assumptions and Constraints

- The depth of analysis and any hands-on verification is based on the time available within this engagement. Cal Net will prioritize breadth of coverage over depth of detail.
- Client will grant reasonably timely access to its facilities, staff, and systems as needed.
- Client shall postpone or minimize any modifications to systems for the duration of this engagement or notify Cal Net through change request.
- Client will be responsible for tasks performed assigned to its own staff and not hold Cal Net responsible.
- Cal Net recommends a full backup of all data be performed prior to engagement start and will not be responsible for loss of data or functionality.
- Start and duration of activities will be based on the availability of client or third-party organizations, in addition to any required resources.
- Activities and technology variances to the scope will be accommodated at Cal Net's discretion.


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# Information Technology Consulting Services

**Quote #027855.3 prepared for Daniel Fabian, Golden Rain Foundation**

**Business Development Executive:** Todd Darr, tdarr@calnettech.com (714) 263-1176

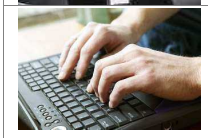
| Monthly SYSManage Services | | Price | Qty | Extended |
|---|---|---|---|---|
| SYSManage is a starter package for businesses that want IT service in Los Angeles, Ventura, and Orange Counties—but prefer to limit both the range of support and the cost. SYSManage clients receive server updates and patch management by our Systems Engineers on an as-needed basis. SYSManage services are proactive systems management practices in which each server is updated with the necessary service packs and updates to secure the operating and anti-virus/spyware systems. All devices are continuously monitored for health and performance and Cal Net is alerted when potential issues arise, allowing our engineering team to resolve issues before they cause system outages. We are also notified of systems that fail after-hours, so that we can begin repairs and fix issues before they interfere with the next upcoming work day. | | | | |
| | **SYSManage Monthly Managed Site Service Level Agreement**<br>Each corporate site will have a site fee and include: (1) 1-hour remote & 4-hour on-site Service Level Agreement (SLA) for emergency situations. (2) All monthly status reports, inventory management, Device on Demand access, and more... (3) Includes TECAlert on all devices, printers, switches, firewall. (24x7 is extra) | $199.00 | 1 | $199.00 |
| | **Cal Net SYSManage Workstation**<br>- Remote Patching, Monitoring, and Maintenance performed by Cal Net' HelpNET remote team, including ESET Anti-Virus | $10.00 | 118 | $1,180.00 |
| | **Cal Net SYSManage Server**<br>- Remote Patching, Monitoring, and Maintenance performed by Cal Net' HelpNET remote team | $199.00 | 7 | $1,393.00 |
| Monthly SYSManage Services | | | Subtotal: | $2,772.00 |

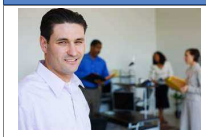
| Monthly 24x7 Service Level Agreement | | Price | Qty | Extended |
|---|---|---|---|---|
| Extend your Emergency Response levels 24x7x365 under all of our managed support programs. In the event of a critical situation (server or network device failure), we provide a GUARANTEED 24x7x7x365 1-hour response through remote access and 4-hour onsite response if the issue cannot be resolved remotely. | | | | |
| | **24x7 Support Access Monthly Fee**<br>Cal Net TECServices - Monthly Recurring Services - 24x7 Support Access Fee Includes: (1) Support Access 24x7x365 Emergency After Hours Support, (2) 1 Hour Telephone Response, (3) 4 Hour On-Site Response | $99.00 | 1 | $99.00 |
| Monthly 24x7 Service Level Agreement | | | Subtotal: | $99.00 |

| Monthly Disk Based and Online Backup Services | | Price | Qty | Extended |
|---|---|---|---|---|
| DBOB includes Cal Net's hybrid cloud and on-premise Disaster Recovery as a Service (DRaaS) solution providing you a GUARANTEED business continuity soluiton managed by Cal Net. | | | | |
| | **SIRIS 3 P4000 Professional - 2+ Year Agreement**<br>Cal Net DBOB (Disk Based and Online Backup) with Unlimited Cloud Based Storage<br>- Rackmount Chassis (1U)<br>- 4 TB Raw / 2 TB Usable storage<br>- 48GB RAM, 4 Core Xeon D-1541 2.4GHz<br>- Dual x 10GbE RJ45 Ethernet ports<br>- 560w Power supply 120/240v<br>- Unlimited # of Machines protected<br>- 3 to 4 recommended Virtual Machines at time. (Varies according to source machine resource needs)<br><br>> Unlimited system licenses for Windows, Mac OSX, and Linux agents<br>> Take snapshots of protected systems, applications, and files<br>> Replicate snapshots to two DBOB Cloud locations for storage and retention<br>and cloud Restore systems and individual files from the DBOB device<br>> On-Site Virtualization on the device, Hybrid Virtualization through device to the DBOB Cloud, and Off-Site Virtualization in the DBOB Cloud<br>> Granular Recovery of Exchange, SQL and SharePoint through unlimited licenses for Kroll Ontrack's software | $188.32 | 1 | $188.32 |
| Off Premise Cloud Based Data Retention: Cloud based data retention enables your DBOB device to synchronize an unlimited amount of data to up to two cloud based storage datacenters. | | | | |
| | **Unlimited Cloud Based Storage – One (1) Year Retention**<br>Includes the monthly recurring costs of the "Unlimited Cloud Based Backup Storage" for the life of contract agreement, including one (1) year of time based retention. At this point, data is being retained for one (1) year in the cloud, and is subject to the intra-daily, daily, weekly and monthly conversion schedule set forth in the Cloud Archiving policy described below.<br><br>Cloud Archiving Policy:<br>Unlimited cloud storage is subject to the intra-daily, daily, weekly and monthly conversion schedule set forth below, for the duration of agreement. The amount of retention years will depend upon the policy selected but all consolidation is based upon the following pre-defined schedule;<br><br>* Intra-Daily to Daily after 3 days<br>* Daily to Weekly after 2 weeks<br>* Weekly to Monthly after 1 month<br>* Monthly backups are deleted on a rolling basis, the oldest first, commencing the first month after one (1) year.<br><br>~ Every System backed up to the Cloud Based Storage is entitled to 30 days of Off-Site Virtualization per year, after which a $150 fee per hour will apply. | $377.16 | 1 | $377.16 |

| Monthly Disk Based and Online Backup Services | | Price | Qty | Extended |
|---|---|---|---|---|
| Support and Maintenance of the DBOB Unit and related services only. | | | | |
| | **DBOB Monthly Support & Maintenance**<br>Cal Net DBOB (Disk Based and Online Backup) Includes the Following Maintenance Warranty & Support:<br><br>- Unlimited Remote DBOB support provided by the Cal Net DBOB HelpNET team.<br>- Unlimited file & server restoration provided by the Cal Net DBOB HelpNET remote team.<br>(**Disaster Recovery scenarios are considered projects & outside the scope of normal restores.)<br>- Unlimited patching of the DBOB units to keep them up-to-date.<br>- Unlimited Software upgrades as they are released for DBOB units.<br>- 24x7 Monitoring of your DBOB unit.<br><br>- Any defect in hardware as a result of ordinary use and/or disaster will be assessed and deemed as replaceable under the discretion of a certified Cal Net Technology Group technician. Once deemed replaceable, Cal Net will express ship a replacement device with offsite data seeded to the device, if necessary.<br>- All incoming requests for file restoration provided by the Cal Net DBOB HelpNET remote team.<br>- 48 hour replacement guarantee.<br>- Ability to upgrade your unit to a larger or smaller unit for no additional cost other than the cost difference of the unit itself. | $113.10 | 1 | $113.10 |
| **Monthly Disk Based and Online Backup Services** | | | **Subtotal:** | **$678.58** |

| Monthly Time Based Engineering | | Price | Qty | Extended |
|---|---|---|---|---|
| System Engineering services are provided by our team of expert engineers, who have extensive experience in implementing, troubleshooting, and repairing server and desktop systems, local and wide-area networks, and data/network security systems. At Cal Net, our full-time staff provides these computer services in Orange County, Ventura County, Los Angeles County, and parts of San Bernardino County.<br><br>* 4-hour guaranteed on site response and 1-hour guaranteed remote response for critical (server/network) failures<br>* Routine scheduled support visits<br>* Help desk user assistance services (Monday-Friday 6:00 am - 6:00 pm)<br>* Daily review of backup success and failure (if selected)<br>* Sample data restoration and routine tape drive cleaning<br>* Proactive server, workstation, and network maintenance and support<br>* Firewall maintenance<br>* Computer hardware and software inventory<br>* Anti virus system maintenance and updating<br>* Security patch and service pack management<br>* Two assigned Cal Net engineers<br>* Software licensing management and product procurement<br>* General user training for Operating System and Microsoft Office | | | | |
| | **Cal Net Systems Field Engineer Monthly Recurring Engineering Services**<br>2 visit per month at 4 hours per visit of scheduled Level II/III Engineering services.<br><br>On-site Escalation available upon request.<br><br>AFTER Hours Emergency Escalation Services (anything not planned 24 hours in advance) is billed at time and a half. | $150.00 | 8 | $1,200.00 |
| **Monthly Time Based Engineering** | | | **Subtotal:** | **$1,200.00** |

| HelpNet As Needed Monthly Services | | Price | Qty | Extended |
|---|---|---|---|---|
| Our HelpNET remote engineering services are designed to provide immediate remote support for our managed service clients. Our friendly, expert engineers are standing by to assist with everything from simple how-to questions to complex server and network system troubleshooting. | | | | |
| | **Cal Net Remote Engineer Level 1 - Monthly Recurring Engineering Services** | $125.00 | | $0.00 |
| | **Cal Net Remote Engineer Level 2 - Monthly Recurring Engineering Services** | $135.00 | | $0.00 |
| | **Cal Net Remote Engineer Level 3 - Monthly Recurring Engineering Services** | $145.00 | | $0.00 |
|  | **Cal Net Senior Engineering - Global Escalation Services**<br>AFTER Hours Emergency Escalation Services (anything not planned 24 hours in advance) is billed at time and a half. | $165.00 | | $0.00 |
| **HelpNet As Needed Monthly Services** | | | **Subtotal:** | **$0.00** |

| Onboarding Service | | Price | Qty | Extended |
|---|---|---|---|---|
|  | **Onboarding Service**<br>This service timeline estimates deliverables in 14 days and Incorporates<br>* Discovery/Documentation<br>* Lockout (as needed)<br>* Baseline assesment (AD cleanup/policy creation, employee onboarding/offboarding and other policies)<br>* Network assessment and penetration testing<br>* Handoff and presentation. | $5,000.00 | 1 | $5,000.00 |
| Onboarding Service | | | Subtotal: | $5,000.00 |

| Ransomware Defense Kit | OPTIONAL | Price | Qty | Extended |
|---|---|---|---|---|
| | **Ransomware Defense Kit**<br>Includes:<br>• Endpoint DNS Security<br>• Content Filtering<br>• Anti-spam Anti-malware Web based Filtering<br>• Ninjio Security Awareness Training<br><br>$999 Deployment Fee Per Location | $8.00 | 118 | $944.00 |
| Ransomware Defense Kit | | | Optional: | $944.00 |

| Recap | Amount |
|---|---|
| Monthly SYSManage Services | $2,772.00 |
| Monthly 24x7 Service Level Agreement | $99.00 |
| Monthly Disk Based and Online Backup Services | $678.58 |
| Monthly Time Based Engineering | $1,200.00 |
| HelpNet As Needed Monthly Services | $0.00 |
| | |
| **Total:** | **$4,749.58** |

Taxes, shipping, handling and other fees may apply. We reserve the right to cancel orders arising from pricing or other errors.

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# PREVENTION FOR ACCELERATION

## Get Ahead Of The Threat With Ransomware Defense Kit Protection.

Cal Net Technology Group is the premier provider of Outsourced IT, Cloud Solutions, Security Services and Unified Communications, servicing small to medium-sized businesses, from our three offices in Southern California. Cal Net's unique Security value is that it is both a Managed IT Service Provider & a Managed Security Service Provider. There are very few IT service providers in the market today that can say they are both. Because of this combination, Cal Net is able to provide cutting-edge security services that fully integrate into a company's total IT services platform. Allowing Cal Net to offer complete IT support, maximum protection, and full remediation solutions, all under one umbrella.

**IF DATA IS IMPORTANT TO YOUR BUSINESS, THEN YOU'RE A TARGET FOR RANSOMWARE**

## CAL NET RANSOMWARE DEFENSE KIT

### THE SECRET WEAPON IN THE WAR AGAINST CYBER EXTORTION

**MALWARE & BOTNETS**

Attackers obtain access to a system via malware, create backdoors and establish control over network of devices.

**SOCIAL & PHISHING SCHEMES**

Attackers do recon on target, create fake email addresses and/or social profiles to infiltrate initial infection.

**SMART & MOBILE HACKING**

Attackers exploit vulnerabilities in Mobile OS and apps to gain access to user data.

### WHAT IS RANSOMWARE & HOW DOES IT WORK?

Ransomware is a term for the many variations of malware that infect computer systems. A cryptovirology attack encrypts critical files and systems and renders them inaccessible to the owner.

Ransomware sometimes marks the files for permanent deletion or publication on the internet. The perpetrators then demand a payment (usually in untraceable cryptocurrency like Bitcoin) for the private key required to decrypt and access the files.

### WHO ARE THE RANSOMWARE PERPETRATORS?

Ransomware cybercriminals are organized and profitable. For cybercriminals, overhead is low, profits are high, Bitcoin is anonymous, targets are endless, the technology is not overly complicated, and the odds of getting caught are very low.

Ransomware perpetrators are sophisticated, profit-hungry, cybercriminals on the lookout for unsuspecting SMBs to extort. Holding their data, and their business, hostage.

### COULD MY BUSINESS BE A RANSOMWARE VICTIM?

In a word—Yes. Ransomware perpetrators cast a wide net. They target small to medium sized businesses with IT security loopholes, valuable data, and a modest budget to pay the ransom.

Cybercriminals send phishing emails to your staff and 94% of people can't distinguish between a real email and a phishing email. They find a way to get in. And if they don't, they try again until someone somewhere clicks the link.

# With Ransomware Defense Kit You Can Choose The Level Of Defense That's Right For You.

| BASIC PROTECTION | PRO PROTECTION | PREMIUM PROTECTION |
|---|---|---|
| $8 per User *per month* | + $8 per Device *per month* | + $8 per Device *per month* |
| Includes:<br>Endpoint DNS Security<br>Content Filtering<br>Proofpoint Business<br>Ninjio Security Training | Includes Everything In Basic Plus:<br>Vulnerability Scanning<br>Remediation Planning<br>Monthly Reports | Includes Everything In Pro Plus:<br>Managed SIEM<br>Compliance Reporting<br>Availability/Performance/Change Management |
| $999 Deployment Fee *per location* | $1499 Deployment Fee *per location* | Custom Deployment Fee |
| Save $.70 Per User | Save $2.70 Per User | Save $5.70 Per User |

BASIC

PRO

PREMIUM

- **SECUREManage Endpoint DNS Security**
  SECUREManage Endpoint DNS Security creates a new layer of cloud-delivered protection in the network security stack, both on and off the corporate network. DNS Security prevents command & control callbacks, malware, and phishing over any port or protocol.
- **ProofPoint Business**
  Targeted email attacks containing malicious links and attachments represent one of the most dangerous IT threats facing enterprises today. Employ advanced threat protection technology that filters inbound and outbound email for spam, viruses, malware, phishing attacks, & more.
- **Ninjio Security Awareness Training**
  NINJIO attacks end user Security Awareness in a different way. We don't lecture your users. We entertain & educate them by telling stories about real life security breaches that happened to real life companies. We do this using 3-4 minute long animated & gamified episodes written by Hollywood writers. We focus on a teachable moment around a specific type of attack. A new episode is released every 30 days. It's like "drip marketing" for Security Awareness.
- **SECUREManage Vulnerability Assessments**
  You can't reduce risk if you can't find, validate, & contextualize it. Cal Net's SECUREManage Vulnerability Assessments dynamically discover your complete attack surface and detect vulnerabilities you are missing today. Understand your threat exposure by determining if your vulnerabilities can be exploited and if your compensating controls are deployed successfully. Contextualize the risks to get a true picture of them as they align to your modern business.
- **SECUREManage SIEM**
  Enables real time aggregation of your data threats, from multiple sources, into one artificially intelligent agent to stop threats as they happen. Provides highest level of Real Time Protection, like a virtual guardian watching over your IT systems. SECUREManage SIEM combines NOC & SOC operations and includes Security Information Event Monitoring, Performance, Availability, Change Monitoring and Configuration/Asset Management within a single pane of glass.

OPTIONS

- **Palo Alto Traps: Advanced Threat Protection**
  Traditional antivirus (AV) is not the solution to endpoint security – it's the problem. AV can no longer stop today's threats. Traps™ advanced endpoint protection is the only product offering that replaces AV with "multi-method prevention": a proprietary combination of malware and exploit prevention methods that pre-emptively block both known and unknown threats.
- **Managed Backup: DBOB**
  Our Disk Based & Online Backup solutions for Disaster Recovery (DRaaS).
- **SYSManage**
  Real time monitoring, alerting, managed Microsoft and 3rd Party patching.
- **Policy Based Configuration**
  AppLocker/EMET Deployment, Backup Segmentation Review, CryptoPrevent, Patch Management Assessment, Email & Link Policy Filtering.

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# Appendix A: RFP Response: Original Request

## General Information

Project objective: Hire an IT consulting/managed services company

Issuing organization: Golden Rain Foundation
13531 St. Andrews Drive
Seal Beach, CA 90740

RFP issued: January 20th, 2017
Proposals due by: January 31st, 2017

Contact information: danielf@lwsb.com
(562) 472-1341

## Background

The Golden Rain Foundation (GRF) is a not for profit corporation/home owners association (HOA) which administers the shared Trust property and facilities owned by the 16 Mutual corporations. The Boards of the independent Mutual corporations directly manage each of the 16 respective Mutuals within Leisure World Seal Beach (LWSB). LWSB is an active adult living community located in Seal Beach, CA.

Each of the Mutuals has an elected, volunteer Board of Directors that manage the residential property. It also elects volunteer representation of the GRF Board of Directors. The GRF Board makes policies and administers the Trust property for the Mutuals. They also oversee the functions of the approximately 250 persons who are employed by the GRF. There is a full-time Executive Director who oversees the departments serving the community. These departments are: Administration, Community Facilities, Finance, Golden Rain News, Human Resources, IT Services, Mutual Administration, Recreation, and Security.

The GRF Board operates through the Executive Committee and 8 standing committees: Architectural Design Review, Finance, Information Technology Services, Mutual Administration, Physical Property, Publications, Recreation, and Security, Bus and Traffic. The Committees work to facilitate cooperative community living within Leisure World.

## Overview

The Information Technology Services Committee is requesting proposals for IT consulting services. The IT consulting company's primary responsibility will be to assess the company's information technology infrastructure, provide recommendations for security, maintenance, and system improvement, and assist the ITS department with elevated issues.


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The on-site ITS department consists of the ITS Systems Analyst and ITS Technician. The ITS department has the responsibility for the implementation, maintenance, operations, and expansion of all information processing and communication systems. The department's objective is to support staff and ensure all technical hardware and systems are functioning correctly. The department is also responsible for the flow of information among staff members, the board/committees, and to the residents via the community website(s) and various software systems.

## Project Goal & Target Audience

All communications will be between the on-site ITS department and IT consulting company to ensure both party's goals align.

The GRF's goal is for the Foundation's systems to be in compliance with all information technology industry standards and be able to pass a standard IT audit. All operating systems and software should be patched and kept up-to-date, network secured with endpoint protection and firewalls, all user files/e-mails backed up, and other processes the consulting company recommends.

The on-site ITS department handles ~95% of technical and help desk inquiries from GRF staff. However, the IT consulting company must offer managed services to assist with the remaining ~5% of inquiries – mainly high level server any other issues the ITS department is unable to resolve.

Since the ITS department resolves most issues, managed services charged on an "as-needed" basis are preferred.

Business hours are 8:00 am to 4:30 pm. However, the Security department is always in operation so 24/7 support is required.

## Sitemap

Managed Systems:

- 118 computers (106 Windows 7, 12 MacOS)
- 14 Konica Copiers
- 147 Polycom Telephones (VoIP)
- 51 Tablets (5 Surface, 46 iPads)
- 75 Surveillance Cameras (World Eye Cam)
- 10 Surveillance Camera Servers
- 7 LPR Cameras
- 3 LPR Camera Servers
- 8 Open Wireless Hot Spots
- 7 Servers (Windows based)
- 3 Remote Networks (Main network is at Administration and provides wireless via antenna to the Library, Security office, and Service Maintenance Yard)
- 8 Patron Computers at Library
- 3 Patron Servers at Library
- 5 Paychex Time Clocks


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Software/Services:

- Patch management: Solarwinds N-able + manual updates
- AV endpoint protection: Bitdefender
- File/e-mail back up: Dell AppAssure
- Firewall: Cyberoam
- Software: Adobe Cloud, Microsoft Suite, CRMs (Adapt, Axxerion), Databases (MySQL + Crystal Reports, Jenark), Microsoft Dynamics GP, DameWare, VMWare
- Servers: Windows Server 2003, 2008 (Active Directory, Exchange, SharePoint, SQL)
- Websites: WordPress – 1 main community website and 16 Mutual websites

## Services Required

- Patch management system
- AV endpoint protection (desktops, servers, e-mail)
- File backup (physical and cloud based)
- E-mail backup (physical and cloud based)
- Network assessment and penetration testing
- Software licensing
- Software support
- Server support and management

We are seeking a program to automatically update software and install Windows patches. We would also like to implement new endpoint protection software on all machines.

Consulting advice and assistance implementing these two systems will be needed.

## Upcoming Projects

- Upgrading/migrating all servers to Microsoft Server 2012/2016
- Re-wiring network locations
- Evaluating broadband and VoIP services
- Consolidate video surveillance system


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Our servers are currently running Windows 2003 and Windows 2008. With 2003 no longer supported and 2008 on its way out, we'll need to migrate all Servers to the latest Server OS. The wiring at our network locations will need to be cleaned up as well.

## Proposals

Please include the following in the proposal:

- List of services the company provides
- Credentials and qualifications
- References and other companies currently associated with
- Contract terms and conditions
- Billing process details (hourly, monthly, etc.)
- Estimated rates / pricing

## Timeline

Proposals will be accepted until January 31st, 2017 at 4:30pm. If you have any questions regarding this RFP, please contact Daniel Fabian at (562) 472-1341 or danielf@lwsb.com.

We are looking to bring the IT consulting company on board as early as March 15th, 2017.

## Point of Contact

| Name | Title | E-mail | Phone |
|---|---|---|---|
| Daniel Fabian | ITS Systems Analyst | danielf@lwsb.com | (562) 472-1341 |
| Barry Holland | ITS Technician | barryh@lwsb.com | (562) 472-1338 |
| Randy Ankeny | Executive Director | randya@lwsb.com | (562) 472-1312 |


**Cal Net Technology Group**
9420 Topanga Canyon Blvd, Suite #100
Chatsworth, CA 91311
Phone: 818-703-5752
Fax: 818-701-7847
www.calnettech.com
CONFIDENTIAL & PROPRIETARY INFORMATION
Information Technology Consulting Services

# Appendix B: Proof of Insurance

ACORD

## CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY): 7/31/2015

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

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

| PRODUCER | CONTACT NAME: Dianne Sonnabend |
|---|---|
| Olympic Insurance Agency<br>1906 West Burbank Boulevard<br>P.O. Box 7725<br>Burbank CA 91510-7725 | PHONE (A/C, No, Ext): (818) 843-4314 FAX (A/C, No): (818) 842-0378<br>E-MAIL ADDRESS: diannes@olympicinsurance.com |

| INSURER(S) AFFORDING COVERAGE | NAIC # |
|---|---|
| INSURER A: Hartford Insurance Company of | 37478 |
| INSURER B: Trumbull Insurance Co | 27120 |
| INSURER C: Hartford Casualty Insurance Co. | 29424 |
| INSURER D: Hartford Accident & Indemnity | 22357 |
| INSURER E: Hartford Fire Insurance Co. | 19682 |
| INSURER F: | |

INSURED: Cal Net Enterprises, LLC, DBA: Cal Net
9420 Topanga Canyon Blvd.
Suite 100
Chatsworth CA 91311

COVERAGES CERTIFICATE NUMBER:CL14102402053 REVISION NUMBER:

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

| INSR LTR | TYPE OF INSURANCE | ADDL INSR | SUBR WVD | POLICY NUMBER | POLICY EFF (MM/DD/YYYY) | POLICY EXP (MM/DD/YYYY) | LIMITS | |
|---|---|---|---|---|---|---|---|---|
| A | GENERAL LIABILITY<br>X COMMERCIAL GENERAL LIABILITY<br>CLAIMS-MADE X OCCUR<br>GEN'L AGGREGATE LIMIT APPLIES PER:<br>X POLICY PRO-JECT LOC | | | 72UUNEN3712 | 10/25/2014 | 10/25/2015 | EACH OCCURRENCE<br>DAMAGE TO RENTED PREMISES (Ea occurrence)<br>MED EXP (Any one person)<br>PERSONAL & ADV INJURY<br>GENERAL AGGREGATE<br>PRODUCTS - COMP/OP AGG | $ 1,000,000<br>$ 300,000<br>$ 10,000<br>$ 1,000,000<br>$ 2,000,000<br>$ 2,000,000 |
| B | AUTOMOBILE LIABILITY<br>ANY AUTO<br>ALL OWNED AUTOS<br>X HIRED AUTOS<br>SCHEDULED AUTOS<br>X NON-OWNED AUTOS | | | 72UUNEN3712 | 10/25/2014 | 10/25/2015 | COMBINED SINGLE LIMIT (Ea accident)<br>BODILY INJURY (Per person)<br>BODILY INJURY (Per accident)<br>PROPERTY DAMAGE (Per accident)<br>Hired/Borrowed Liab | $<br>$<br>$<br>$<br>$ 1,000,000 |
| C | X UMBRELLA LIAB X OCCUR<br>EXCESS LIAB CLAIMS-MADE<br>DED X RETENTION $ 0 | | | 72RHUEN3758 | 10/25/2014 | 10/25/2015 | EACH OCCURRENCE<br>AGGREGATE | $ 4,000,000<br>$ 4,000,000 |
| D | WORKERS COMPENSATION AND EMPLOYERS' LIABILITY<br>ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) Y/N N<br>If yes, describe under DESCRIPTION OF OPERATIONS below | N/A | | 72WEGH5390 | 10/25/2014 | 10/25/2015 | X WC STATU-TORY LIMITS OTH-ER<br>E.L. EACH ACCIDENT<br>E.L. DISEASE - EA EMPLOYEE<br>E.L. DISEASE - POLICY LIMIT | $ 1,000,000<br>$ 1,000,000<br>$ 1,000,000 |
| E | Errors & Omissions<br>Claims Made-Ded-$25,000 | | | 72TE028715514<br>Retro Date: 12/17/2002 | 10/25/2014 | 10/25/2015 | Each Wrongful Act<br>General Aggregate | 2,000,000<br>2,000,000 |

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)
*30 Days Notice of Cancellation with 10 Day Cancellation Notice for Non-Payment of Premium

CERTIFICATE HOLDER

Cal Net Enterprises, LLC
9420 Topanga Canyon Blvd. #100
Chatsworth, CA 91311

CANCELLATION

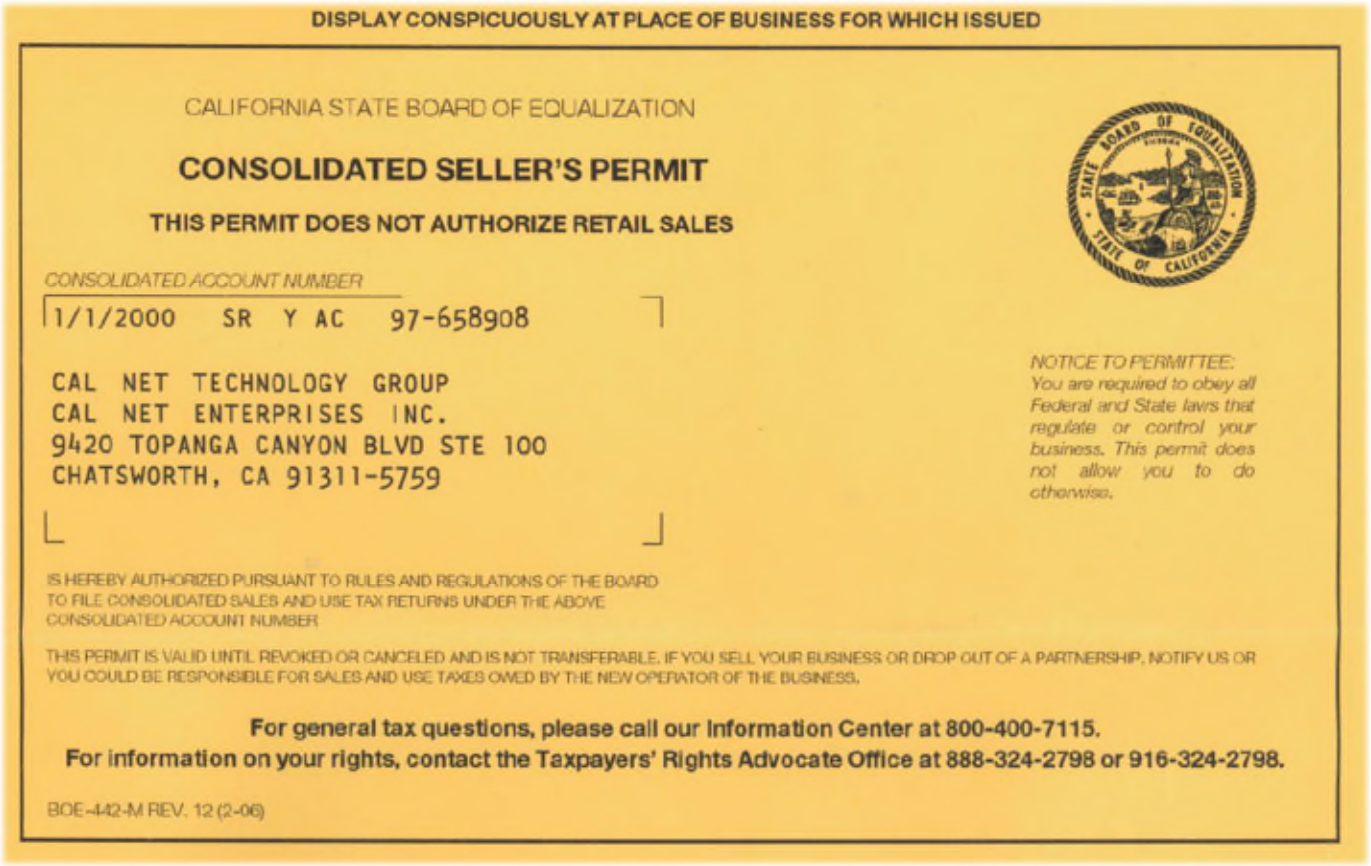
SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

Donald Barberie/DLS

p ACORD 25 (2010/05) © 1988-2010 ACORD CORPORATION. All rights reserved.

# Appendix C: Seller's Permit



DISPLAY CONSPICUOUSLY AT PLACE OF BUSINESS FOR WHICH ISSUED

CALIFORNIA STATE BOARD OF EQUALIZATION

**CONSOLIDATED SELLER'S PERMIT**

**THIS PERMIT DOES NOT AUTHORIZE RETAIL SALES**

*CONSOLIDATED ACCOUNT NUMBER*

1/1/2000 SR Y AC 97-658908

CAL NET TECHNOLOGY GROUP
CAL NET ENTERPRISES INC.
9420 TOPANGA CANYON BLVD STE 100
CHATSWORTH, CA 91311-5759

*NOTICE TO PERMITTEE:*
*You are required to obey all Federal and State laws that regulate or control your business. This permit does not allow you to do otherwise.*

IS HEREBY AUTHORIZED PURSUANT TO RULES AND REGULATIONS OF THE BOARD TO FILE CONSOLIDATED SALES AND USE TAX RETURNS UNDER THE ABOVE CONSOLIDATED ACCOUNT NUMBER

THIS PERMIT IS VALID UNTIL REVOKED OR CANCELED AND IS NOT TRANSFERABLE. IF YOU SELL YOUR BUSINESS OR DROP OUT OF A PARTNERSHIP, NOTIFY US OR YOU COULD BE RESPONSIBLE FOR SALES AND USE TAXES OWED BY THE NEW OPERATOR OF THE BUSINESS.

**For general tax questions, please call our Information Center at 800-400-7115.**
**For information on your rights, contact the Taxpayers' Rights Advocate Office at 888-324-2798 or 916-324-2798.**

BOE-442-M REV. 12 (2-06)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Information Technology Consulting Services

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fpa TECHNOLOGY SERVICES, INC.
Computer Consulting & Custom Programming

# We Get *IT*! IT Services
# Network Assessment & Support Proposal

*Presented to:*

## Golden Rain Foundation

*February 5, 2017*

**FPA Technology Services, Inc.**
16000 Ventura Boulevard, Suite 550
Encino, California 91436
http://www.fpainc.com
818-501-3390

*"We focus on your IT,
so you can focus on your business!"*

Microsoft GOLD CERTIFIED Partner
Security Solutions
Advanced Infrastructure Solutions
Networking Infrastructure Solutions
vmware PARTNER ENTERPRISE SOLUTION PROVIDER INFRASTRUCTURE VIRTUALIZATION
CITRIX PARTNER Silver Solution Advisor
cisco Registered Partner
SONICWALL APPROVED SOLUTION PROVIDER
CompTIA MSP PARTNERS ASSOCIATE

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# 1. Introduction

## 1.1. Bio:

**FPA Technology Services, Inc.** has provided outsourced IT services to growing businesses in the Southern California area since 1991. With our "business first" approach, we pride ourselves on being a trusted technology advisor helping clients leverage technology to achieve their business objectives. As a single source for all the technology services an organization may need, we offer three areas of service:

- IT Management, Planning, and Guidance
- Network Design, Planning, Implementation, and Support
- Custom Application and Web Design, Development, and Support

By providing a "one-stop-shop" of IT services to organizations and with a "Business Before Technology" approach, FPA is able to effectively handle all of a company's IT needs, allowing client management to focus on achieving their business objectives. Our goal is to completely remove technology as an item of worry for our clients. Everything we do revolves around this focus - network monitoring, maintenance, support, helpdesk, antivirus, spyware, backup, security protection, virtualization, and business continuity.

***We focus on your IT, so you can focus on your business!***

Our technical expertise enables us to effectively deliver the most advanced solutions available. We have Certified Information Systems Security Professionals (CISSP) on staff. We are Microsoft Gold Certified Partners. We are Microsoft Small Business Specialists. We are VMware, Citrix, SonicWall, ESET, and Symantec Certified Partners. Our relationships with partners such as Microsoft, Dell, HP, Cisco, Citrix, SonicWall, VMware, Symantec, ESET, StorageCraft, Barracuda, Websense, ShoreTel, and others allow us to design, scale, implement, support, and protect highly effective infrastructure solutions for our diverse client base. Our systems and methodologies allow us to leverage industry standard best practices to improve the efficiency and effectiveness of the services we provide.

FPA currently consists of 24 full-time employees and is organized as follows:

- 4 - Senior Technical Management
- 6 - Helpdesk / NOC
- 8 - Onsite / Remote Network Engineers
- 1 - Sales & Marketing
- 5 - Operations / Administrative Support

FPA works with clients who want to get the most out of their technology while receiving the highest ROI available. With FPA, it's about how we do what we do. It's about the value we provide to our clients. It's about the relationships we develop along the way. It's about removing the worry from IT.

***Business Before Technology™* - We Get IT!**

# 1. Introduction (cont.)

## 1.2. Certifications, Associations, and Awards:

### Vendor Certifications

- Microsoft Gold Certified Partner
- Microsoft Small Business Specialist
- Microsoft Security Solutions Competency
- Microsoft Advanced Infrastructure Solutions Competency
- Microsoft Networking Infrastructure Solutions Competency
- Microsoft VAR Champs Club Member
- VMware Enterprise Partner
- SonicWall Certified Security Partner
- Cisco Registered Partner
- Symantec Silver Partner
- ESET Authorized Partner
- ShoreTel Authorized Champion Partner

### Associations / Affiliations

- (ISC)²
- CompTIA
- MSP Alliance
- MSP Partners
- ICCA
- ITA

### Vendor Affiliations

- Microsoft
- Dell Solution Provider Direct
- HP
- Lenovo
- VMware
- Citrix
- Symantec
- ShoreTel
- ESET
- SonicWall
- StorageCraft
- Barracuda
- Cisco
- Juniper
- Websense
- RingCentral
- iBackup
- Intermedia
- Google
- Smarsh
- AdvisorMail
- Sage
- ThinPrint
- OpenDNS

### Awards

- Los Angeles Business Journal – Best Places to Work in LA
- San Fernando Valley Business Journal – Largest IT Consulting Firms
- MSPMentor - Top 250 List
- CRN – Fast Growth 150 List
- U.S. Small Business Administration - Innovation Through Technology Business of the Year
- Microsoft – VAR Champions Club
- Level Platforms, Inc. – Innovator of the Year

# 1. Introduction (cont.)

## 1.3. Why FPA:

We understand that you have many choices when choosing a technology partner. In addition to our commitment to IT "worry removal" and forging long-term, trusted relationships with our clients, there are a number of other, significant benefits of working with FPA:

- Our Experience
- Our Technical Expertise
- Our Training and Certifications
- The Character and Professionalism of our Staff
- Our "Business First" Approach
- Our Unrelenting Focus on Client Satisfaction
- Our Dedicated Assessment and Project Teams
- Our Proven Systems and Methodologies
- We Provide Extensive Documentation
- Access to our Proprietary Online Client WebPortal
  *(allowing you immediate access to all of the information about your technology as well as the status of our ongoing support services!)*
- Access to our Online KnowledgeBase
- Our Full-Time, In-House, Dedicated Remote Help Desk
- Access to our Procurement Services

You know and we know that it's easy to make claims when it comes to service and quality. Accordingly, we encourage you to call some of our references and hear it for yourself. No one compares with FPA when it comes to timely, effective, and secure IT consulting, management, and support services.

# 1. Introduction (cont.)

## 1.4. Management Team:

One of our key differentiators is the quality of our staff. The following details our Management Team:

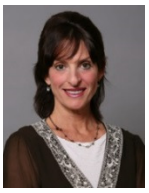
**Craig Pollack *Founder & CEO***

Since inception, Craig has provided the strategy and direction for FPA, setting the standard for how our staff go about ensuring that our clients leverage technology most effectively to achieve their business objectives. While acting as the trusted advisor for many clients, Craig also provides expertise for FPA in the Investment Counsel, CPA, and Manufacturer & Distributor vertical markets. Craig holds a Bachelor of Science Degree in Computer Science focused on Business Systems Design from California State University Northridge. Craig began his professional career more than 25 years ago working with clients developing custom software applications.

**Kyle Eichenbaum *Chief Operating Officer***

Kyle is responsible for the overall business operations of FPA. Within our "Culture of Constant Improvement", he effectively directs internal improvement initiatives throughout the organization. He also ensures all areas of service delivery meet or exceed FPA's stated goals and objectives. He defines and enacts the policies and procedures needed to ensure all Quality of Service measurements are measured and exceeded while also ensuring all staff adhere to our principal Core Values we hold dear. Kyle holds a Bachelor of Science Degree from California State University Northridge.

**Dee Perez *Director of Professional Services***



Dee is responsible for the overall "health" of our staff as well as our clients. In addition to sourcing, training, and retaining our staff, she ensures internally and externally that FPA is delivering the highest client service experience a professional services firm can deliver. Her ability to literally eat, breathe, and sleep client service is due to her 20+ years of experience with FPA. Dee holds a Bachelor of Science Degree in Business Administration from California State University Northridge.

**Americo Dell'Orco *Director of Client Management***

Americo oversees our Technical Account Managers who provide the ongoing management of all client accounts. He sets and manages all Quality of Service measurements ensuring the ongoing quality, care, and customer service is delivered consistently across all of our clients. In addition to defining and overseeing the policies and procedures related to the management of client engagements, Americo also acts as a Technical Account Manager for specific clients. Americo has over 15 years of experience in the IT industry as well as retired with the rank of Sergeant from the United States Marine Corps.

**Alex Kazmin, CISSP *Security & Technology Assessment Manager***

Alex focuses on running the initial onboarding phase for new clients by implementing and delivering the Network Health Assessment Report via our Technology Review Project as well as running our Technology Security Assessment Projects. Alex has nearly 20 years of experience in the IT industry, holds an A.S. in Computer Science from Brick Computer Science Institute, as well as is a Certified Information Systems Security Professional (CISSP).

**Mike Sapienza *Service Delivery Manager***

As FPA's Service Delivery Manager, Mike oversees all day-to-day aspects of our support and project delivery services. In addition, Mike is charged with developing and managing our engineering staff including improving their technical and professional skills all while meeting FPA's Core Values. Mike brings to the table over 15 years of experience working in various IT helpdesk support and management roles.

**Jerry Kim *Manager of NOC Services***

Jerry oversees all day-to-day aspects of our in-house Network Operations Center. Our NOC monitors, manages, and maintains our clients' network proactively while responding to and addressing machine generated alerts. In addition our NOC manages all of our clients' backup and disaster recovery preparedness. Mike brings to the table over 15 years of experience working in various IT helpdesk support and management roles. Jerry holds a Bachelor of Arts Degree in Psychology from the University of California at Santa Barbara.

# 2. Environment

## 2.1. General:

This proposal is being presented to:

**Golden Rain Foundation**
13531 Saint Andrews Drive
Seal Beach, CA 90740

## 2.2. Network Inventory:

Based on the information provided and a cursory network inventory, the following provides a recap of the type and number of components within your current computer network environment as we currently understand it to be (as detailed in the accompanying "Appendix A"):

| Loc. | Servers (Phys/Virtual) | N/W Devices | Printers (NW/Local) | W/S's | Laptops | Tablets | Thin Clients | Other (Apple) | Remote Users | PDA's |
|---|---|---|---|---|---|---|---|---|---|---|
| 6 | 9 (2 / 7) | 23 | 64 | 106 | 2 | 51 | 0 | 12 | 0 | 0 |

Number of Seats / Users: ≈ 118

## 2.3. Network Overview:

Golden Rain Foundation's network infrastructure is currently based on the following:

- The main office location located in Seal Beach, CA houses the corporate network infrastructure with 5 other locations close in proximity
- Internet connectivity at the main office location is provided through a Microwave circuit at 10mb; the carrier is Franklin Technology Services.
- A Microsoft Windows Domain consisting of 2 physical host servers, 1 storage array, and 7 virtual servers currently in production acting as various roles. The version of MS-Windows Server on the servers range between Windows Server 2003 and Windows Server 2008 R2.
- The network consists of approximately 106 workstations (in total), approximately 23 network devices (switches, routers, wireless access points, etc.) as well as networked and/or local printer / copiers.
- The network infrastructure is intended to support Microsoft Office and other specific "Line of Business" applications.
- Email services is hosted interlay on an on-premise MS-Windows 2010 Exchange Server
- The current status of Email archiving, text messaging archiving, and LinkedIn archiving is unknown at this time
- The information stored on the servers is being backed up locally via UltraBac. It is unclear if the backup is being stored offsite, what the recurrence of the backup is, nor to what degree of completeness.
- The corporate anti-virus solution in place currently is Bit Defender. It is unclear if the servers are protected nor is it clear if all workstations are protected.
- The corporate anti-spam solution in place currently is currently unknown. It is unclear to what degree Spam is being blocked nor if all mailboxes and public folders are being protected.
- The current firewall in place is a FTS G2e-2000; however, the status of external intrusion protection is unknown at this time.
- Remote connectivity into the network is provided through a VPN via a dedicated SSL-VPN device; the make nor model of this device is unknown at this time.

Golden Rain Foundation is highly dependent on the stability of its network infrastructure. In addition, because of the nature of its business operations and the connectivity requirements, it is highly dependent on its internet connections as well.

# 2. Environment (cont.)

## 2.4. Critical Issues:

We understand the following to be key IT issues critical to effectively utilize technology for the ongoing success of your organization:

- Ensuring optimal network performance
- Ensuring ongoing network uptime
- Ensuring consistent and stable data backups with capacity to recover from disasters
- Establishing Best Practices for internal and remote users
- Providing a timely response to all support requests and issues
- Having a proactive approach to IT management and support
- Ensuring a highly proactive approach to communications (ie: regarding the status of issues, the status of visits, ongoing concerns, project planning & execution, etc.)
- Managing, tracking, and addressing IT issues by utilizing an organized methodology
- Providing remote network monitoring and proactive alert resolution
- Automating Microsoft Windows Operating System service pack and patch management for servers and workstations
- Providing proactive strategic IT guidance and expertise

## 2.5. Goals and Objectives:

In addition, we believe it's crucial that the proper approach be enacted to manage and maintain a mission critical network of this nature. By proactively managing your network under the guidance and expertise of an organization such as FPA, Golden Rain Foundation's management will ensure:

- Value for their technology investments
- The likelihood of downtime will be minimized as much as possible - as well as as short as possible (should it occur)
- That Golden Rain Foundation's staff can focus on their business
- The investment in the existing network infrastructure will be properly utilized
- The ongoing reliance on the network infrastructure for your business critical applications will be as effective as possible
- The individual network components will last as long as possible
- The productivity of their staff relying on technology will be as effective as possible
- That Golden Rain Foundation will realize a better ROI in their technology investment

# 3. Services to be Provided

Our process for effectively taking on a new client is based on the following three phased approach:

1. Initial Network Health Assessment
2. Remediation
3. Ongoing Support / Managed Services

## 3.1. Initial Network Health Assessment:

To be able to effectively provide our IT support services, we begin by performing a complete and thorough Network Health Assessment. This allows us to determine, document, and review any glaring issues within the underlying network infrastructure. To do this, we perform our FPA **Technology Review Project** (TRP).

The **Technology Review Project** (TRP) involves installing our remote network monitoring probe and documenting, inventorying, and assessing all hardware, software, and network components at your site. This project is especially important when we undertake a new client relationship as it gives us the opportunity to intimately familiarize ourselves with the details critical for providing fast and effective ongoing support. In addition, it also gives us the ability to determine the status of the key areas required within your network (ie: backup, anti-virus, firewall protection, etc.) and how they compare to the minimum requirements needed for FPA to meet our obligations under a Service Level Agreement when providing ongoing support under one of our Managed Service plans. After the initial information gathering phase, we will prepare a detailed *Current Issues and Comments Report* detailing our findings, their impact, as well as our recommendations.

As part of the project, we review, gather, and document the following:

a. All Servers in your office (both physical and virtual)
b. The virtual infrastructure and / or network attached storage devices
c. All workstations in your office
d. All routers, switches, hubs, and wireless access points in your office
e. All firewalls and any other network security devices
f. Any existing backup, security, and infrastructure software
g. Any existing cabling diagrams
h. Any existing documentation from your current ISP
i. All external connectivity and related internet connectivity
j. Any documentation for any current servers or workstations to establish warranty or licensing statuses
k. Any 3rd Party related software, systems, account info, contact info, etc.

In addition to reviewing and documenting your technology infrastructure, one of the key aspects of the **Network Health Assessment** is to bring to light the level of the network as compared to the key requirements needed for FPA to manage, maintain, and support it on an ongoing basis under our Managed IT Services approach (see phase 3 for details of these requirements).

At the conclusion of the initial **Network Health Assessment** project, we meet with you to review our findings, prioritize the action items (as to whether they are immediate or can be addressed over time), and discuss any recommended courses of action along with any related costs to address the issues. In addition, we will also review the status of the network as it relates to meeting the requirements for FPA to provide ongoing Managed Services support under a fixed fee arrangement.

# 3. Services to be Provided (cont.)

## 3.2. Remediation:

The second phase of our new client on-boarding process involves the remediation of the critical issues found during the initial **Network Health Assessment** phase. During this phase we will perform any of the agreed upon tasks required to improve the performance, stability, and health of your network. Some of the tasks that we have performed for some of our more recently on-boarded new clients during this phase include:

a. Correct incomplete or inaccurate network backups (including upgrading software to the most recent version or possible replacement)
b. Correct incomplete or inaccurate antivirus systems (including upgrading software to the most recent version or possible replacement)
c. Implement Best Practices methodologies such as "locking down" user profiles, addressing network wide security policies, and reorganizing server roles
d. Correct corrupt MS-Windows Active Directory functionality
e. Add "missing" workstations to the MS-Windows domain
f. Secure the network from intruders (including change all Administrator passwords, reconfigure all Administrator services, close all open firewall ports, update firewall firmware, etc.)
g. Reconfigure network architecture to significantly improve network performance

In addition to these standard remediation items, some of the issues that Golden Rain Foundation specifically may need to address include the following:

a. Address any potential backup issues
b. Address Anti-virus and Anti-malware concerns

Naturally, these issues are based our initial discussions as well as a cursory network inventory on your network configuration as we currently understand it to be (since we have not yet completed our standard FPA **Technology Review Project**).

# 3. Services to be Provided (cont.)

## 3.3. Ongoing Support / Managed Services:

**FPA Technology Services, Inc.** is pleased to offer our *Worry Free, Fixed Fee* managed IT support services to Golden Rain Foundation. The components of our *We Get IT!* Managed IT Services offering are made up of the following service levels:

- Manage*IT (Remote Network Monitoring, Alerting, Proactive Maintenance and Management)*
- Support*IT (Remote Network Administration and Enduser Helpdesk Support)*
- Protect*IT (Unlimited Support, Business Continuity, and Disaster Recovery)*

**Manage*IT*** is the initial base service level of our proactive IT Services. At this level, we provide network monitoring and alerting, backup management and reviews, server and workstation OS patching, and overall proactive maintenance and management of the network infrastructure components and utility software (ie: backups, antivirus protection, firewall, switch, and router firmware upgrades, etc.).

**Support*IT*** is the second service level and core component adding remote network administration and enduser helpdesk support services layered on top of our proactive network management services. Using FPA's proven Best Practices methodology for remotely supporting network infrastructure, these two service levels combined address between 85-95% of all your ongoing network infrastructure management and support needs – things like network management, server management, Active Directory and User management, server and workstation patch management, network utility software updates, equipment firmware updates, virus updates, remote enduser helpdesk support, etc.

**Protect*IT*** adds to the base monitoring, alerting, maintenance, administration, and support of Manage*IT*, and Support*IT* by including complete and total support of your current network infrastructure through the addition of unlimited onsite support (as needed), disaster recovery (server and workstation replacement services), business continuity planning, and network security services. This added layer of protection gives a complete level of comfort knowing your technology support needs are completely covered and the network is protected to the highest degree as part of our proactive, fixed-fee IT management and support approach.

# 3. Services to be Provided (cont.)

## 3.3.1. Requirements:

To manage, maintain, and support the network infrastructure on an ongoing basis under our Managed IT Services approach, The Golden Rain Foundation's network needs to be running at a certain base level. The following details the minimum requirements needed (for *ManageIT* and above) to ensure the proper network infrastructure is in place for FPA to meet our service obligations under our Service Level Agreement:

| # | Service Level | # | Client Network Requirement |
|---|---|---|---|
| **I.** | **Manage*IT*** | 1. | At least 1 full-time inhouse IT staff |
| | | 2. | Full time Internet connection (DSL speed or greater) |
| | | 3. | Ability to implement our monitoring server into the existing Windows domain (the network must be in a domain configuration with all workstations joined to the domain) |
| | | 4. | Sole access to the network administrator username and password |
| | | 5. | Up-to-date industry standard, server based, network backup software (ie: BDR device or equivalent) |
| | | 6. | Up-to-date industry standard, server based, enterprise wide, antivirus software (ie: ESET NOD32 or equivalent) |
| | | 7. | Up-to-date industry standard firewall (ie: SonicWall Firewall) |
| | | 8. | All Wireless data traffic in the environment must be securely encrypted |
| | | 9. | All servers with Microsoft Windows operating systems must be running Windows Server 2008 or later, and have all of the latest Microsoft service packs and critical updates installed |
| | | 10. | All servers must have sufficient UPS battery backup protection running APC PowerChute Business Edition or other power management software |
| **II.** | **Support*IT*** | 1. | All desktop PC's and notebooks/laptops with Microsoft Windows operating systems must be running Windows 7 Pro or later, have all of the latest Microsoft service packs and critical updates installed, and joined to the domain. |
| | | 2. | Workstation must be "non-white box" and must be less than 5 years old |
| **III.** | **Protect*IT*** | 1. | Up-to-date same-day server warranty coverage (for all servers; servers must be "non-white box") |
| | | 2. | All workstation, laptops, and thin client desktops "locked down" via GPO security objects |
| | | 3. | Up-to-date industry standard drive imaging software (ie: BDR device, StorageCraft ShadowProtect, or equivalent) |

Note: Services required to meet these standards may need to be performed as a task during the Remediation phase outside the scope of the ongoing support agreement and will be presented during the Report Review portion of the **Technology Review Project**.

# 3. Services to be Provided (cont.)

## 3.3.2. What our Managed Services Offerings Cover and Include:

- Network Monitoring Server Probe
- Real Time Monitoring 24x7x365 Service of all covered items
- Unlimited access to FPA's Client WebPortal
- Proactive OS and Service Pack Patching of all covered workstations
- 3rd Party Vendor Relationship Management
- Proactive Maintenance and Patching of all covered servers
- Proactive Remote Network Maintenance of all covered items
- Limited Remote Help Desk Support for all covered items within the hours of 7:00am – 7:00pm Monday thru Friday excluding holidays *(if SupportIT selected)*
- Increased Remote Help Desk Support *(if ProtectIT selected)*
- Replacement Workstation Install & Configuration *(if ProtectIT selected)*
- Outsourced CTO/CIO Services *(if ProtectIT selected)*
- Non-FPA Business Hours On Call Priority Remote Support *(for an additional fee)*

## 3.3.3. Deliverables:

- Network performance reports monthly available via our Client WebPortal
- Onsite status review meetings annually *(quarterly if SupportIT is selected)*
- Onsite support visits monthly or quarterly *(depending on your specific plan)*
- Specific CTO/CIO functions *(if ProtectIT Is selected)*

## 3.3.4. What our Managed Services Offerings Do NOT Include:

- Remediation of items needed to meet the Requirements as listed on page 11
- Implementation services related to new or additional components (ie: new workstations, servers, printers, WAP's, etc.)
- Support of components not included in the "Environment" section
- Services related to addressing alerts or support requests outside the hours of 7:00am – 7:00pm Monday thru Friday or holidays
- Hardware or Software costs
- Cabling Services
- Phone, Fax, Copier, or Video Surveillance System Support Services
- Custom Programming or Web Development Services
- Application software specific support services
- End-user Training Services

# 3. Services to be Provided (cont.)

## 3.3.5. Hourly Rates (for services performed outside an ongoing support plan):

| Staff Level | Hourly Rates With a M/S Plan | Standard Hourly Rates |
|---|---|---|
| Senior Management | $225.00 | $275.00 |
| Senior TAM / Security Manager | $200.00 | $250.00 |
| Technical Account Manager | $175.00 | $225.00 |
| Project Manager/Senior Engineer | $165.00 | $210.00 |
| Engineer (Desktop, System, Network) | $150.00 | $200.00 |
| Specialist (Desktop, System, Network) | $135.00 | $185.00 |
| Administrator (Desktop, System, Network) | $125.00 | $175.00 |

*Note: For onsite service, one-way travel time is charged.*
*For after hours or weekend work, time and a half is charged.*

## 3.3.6. Process:

While the cost of our Managed Services is broken down into a fixed monthly fee (based on your organizations' unique IT needs and specific network configuration and size), the payments for the program are incurred quarterly and made prior the start of the quarter. The details of the services we will provide for you, the response times, the items covered (and not covered) as well as the general terms and conditions are all detailed in the *Service Level Agreement* (SLA). The need for an SLA is standard in all Managed Services agreements. This is what formally defines our roles and responsibilities and the nature of the ongoing relationship going forward. Any time and material invoices for services outside the scope of this agreement will be sent according to our existing service fee arrangement.

Once the signed SLA and initial payment are received, we begin the process by first setting up the remote monitoring probe. This involves delivering an FPA provided server and then configuring the monitoring software and patch management application. Within the first week we will configure the monitors and alerts specific to your network's needs. In addition, we will create a "HelpDesk" email user within your network that will automatically route all support requests directly to our helpdesk to ensure rapid response. During this initial setup period we will setup access to our Client WebPortal for you. Monthly, we will post network status reports to our WebPortal. If onsite visits are part of your specific service plan, we will provide onsite visits as needed.

Depending on the service level selected, we will meet with you quarterly or annually to review the status of your network and review any findings or concerns and provide possible recommended changes at that time. During any network lifecycle, changes and additions to the network are the norm. If the change is replacing one piece of equipment with a replacement one, this will not change the associated ongoing support fee. However, if any additions are made to the network, naturally, the ongoing fee for increased support would be affected (these incremental costs are also detailed in the SLA).

# 3. Services to be Provided (cont.)

## 3.3.7 Service Level Plan Options:

While each of our service plans begins with the base level of remote network monitoring and reporting, each plan offers an increased level of features over the previous plan. A summary of these service level plans and range of related costs for your current network configuration are as follows:

| Component / Deliverable | Service Level Plan | | |
|---|---|---|---|
| | **ManageIT** | **SupportIT** | **ProtectIT** |
| 24x7x365 Remote Network Monitoring & Alerting[1] | ● | ● | ● |
| Remote Alert Resolution *(for minor Alerts[2])* | ●[2] | ● | ● |
| Network Performance Reports (Monthly) | ● | ● | ● |
| Remote Patch Management (Workstations & Servers) | ● | ● | ● |
| Remote Server & Network Maintenance | | | |
| ▪ Active Directory Maintenance | ● | ● | ● |
| ▪ Exchange Server Maintenance | ● | ● | ● |
| ▪ Hard Drive Maintenance | ● | ● | ● |
| ▪ Management & Maintenance of N/W Utility Software (Backup, Antivirus, Firewall, etc.) | ● | ● | ● |
| ▪ Router and Switch Maintenance | ● | ● | ● |
| ▪ Network Device Firmware Upgrades | ● | ● | ● |
| Asset Tracking | | | |
| ▪ HW & SW Inventory Tracking, SW License Tracking, Maintenance Tracking | ● | ● | ● |
| Technology Documentation | | | |
| ▪ Network Diagram, Server Room Pictures, Startup & Shutdown Procedures, New User Setup Checklist, Computer Use Policy | ● | ● | ● |
| Access to FPA Procurement Services | ● | ● | ● |
| Access to the *FPA Client WebPortal* | ● | ● | ● |
| Remote Network Administration | | | |
| ▪ Active Directory & Exchange Server User Administration | ○ | ● | ● |
| ▪ User Workstation Profile Creation *(for existing machines)* | ○ | ● | ● |
| ▪ Application Installation *(for existing apps & machines)* | ○ | ● | ● |
| Account Management | | | |
| ▪ Reduced Hourly Rates | ● | ● | ● |
| ▪ Dedicated Account Manager as a Strategic Resource | ○ | 6 hrs / qtr. | 12 hrs / qtr. |
| ▪ 3RD Party Vendor Management | ○ | ● | ● |
| ▪ IT Planning & Status Meetings | ○ | Quarterly | Quarterly |
| ▪ Annual Technology Plan & Budget | ○ | ○ | Annually |
| Remote Network Helpdesk Support[3] | ○ | 42 hrs / qtr.[3] | Unlimited |
| Onsite Support Visits (as needed)[3] | ○ | 16 hrs / qtr.[3] | As Needed |
| Anti-Virus Protection (Workstation & Server)[4] | ○ | ○ | ●[4] |
| Anti-Spam Protection[5] | ○ | ○ | ●[5] |
| Anti-Ransomware Protection[6] | ○ | ○ | ●[6] |
| Replacement Workstation Install & Configuration | ○ | ○ | ● |
| Mobile Device Management (PDA Install, Config & Support)[7] | ○[7] | ○[7] | ○[7] |
| 24x7 On Call Priority Remote Support[8] | □[8] | □[8] | □[8] |
| Pre-Approved Technology Projects | ○ | ○ | TBD |
| **Golden Rain Foundation's Monthly Investment (estimated):** | **$2,175**[9] | **$4,625**[9] | **--**[9] |

**Notes:**

● included ○ available on a Time & Materials basis

[1] includes the FPA provided monitoring & patch management server

[2] a "minor alert" is defined as one which can be resolved remotely and in less than 30 minutes per incident

[3] remote & onsite support capped per Quarter

[4] includes annual licensing for ESET NOD 32

[5] includes annual licensing for Reflexion Hosted Filtering

[6] includes annual licensing for OpenDNS Hosted Filtering

[7] MDM available at an additional (per device) fee

[8] 24x7 off-hours response available for an additional fee

[9] Initial install fee equal to one month of the Service Level selected is waived as part of the Technology Review Project

Details of each plan would be covered in an associated *Service Level Agreement*. All other consulting and project specific tasks outside the scope of these plans are provided at our standard hourly rates and/or on a project specific basis.

* Once the Network Health Assessment is completed, we will meet with you, review our findings, and based on our experience and overall approach to managing and supporting the IT infrastructure for organizations such as yours, provide a final recommendation on the optimum Service Level for Golden Rain Foundation.

# 4. Benefits

## 4.1. Why Managed Services:

We understand that there are different ways to provide and charge for technology services. With our Managed Services approach we are now truly your trusted technology partner with our goals and objectives in alignment with yours. There are a number of critical reasons to choose FPA and our *We Get IT! Managed IT Services* as your approach to supporting your network infrastructure including:

- Change IT from a Reactive Approach to a Proactive one

  *Adding remote monitoring, alerting, and patch management allows us to deal with many issues BEFORE they before larger problems. This really is a paradigm shift in terms of providing IT support.*

- Improve the Overall Network Health

  *Rather than simply responding to problems reactively, our goal now is to improve the overall health of your system ultimately increasing uptime, improving your company's overall productivity, all while reducing your long term costs.*

- Improve Knowledge through In-depth Reporting

  *Our Remote Network Monitoring system gives us extensive reporting capabilities which gives us the ability to see and report on trends such as CPU utilization, memory usage, disk space usage, etc as well as the ability to look at the performance of the network in a purely objective fashion.*

- Fixed Fee Support Costs

  *By offering our technology services at a fixed fee, you can now more effectively manage your technology budget. Network support is usually one of the larger technology line items and can go up and down over time. Rather than looking for ways to save money in the short term by not performing needed maintenance, the Managed Services approach allows you to save money over the long term by improving the long term health and stability of your network assets, all while leveling off your ongoing support costs.*

There are also a number of additional benefits including:

- Much Faster Response Time to Problem Resolution
- Increased Operational Efficiency
- Cost-Effectively Gain Access to Enterprise-Level Support Staff
- Access to Years of Technology Experience
- Access to Industry Standard Best Practices and Methodologies
- Peace of Mind Knowing that your Network is Monitored 24x7x365
- Regain the Ability to Focus on Running Your Business (not your IT)

Going with our *We Get IT! Managed Services* truly is a "win-win"!

# 4. Benefits (cont.)

## 4.2. Return on Investment:

We understand that one of the key decision making factors (that quite frankly is often overlooked) is the return on investment (ROI) for selecting an outsourced IT solution provider. The following presents a simple ROI breakdown if Golden Rain Foundation were to select our *SupportIT* level plan:

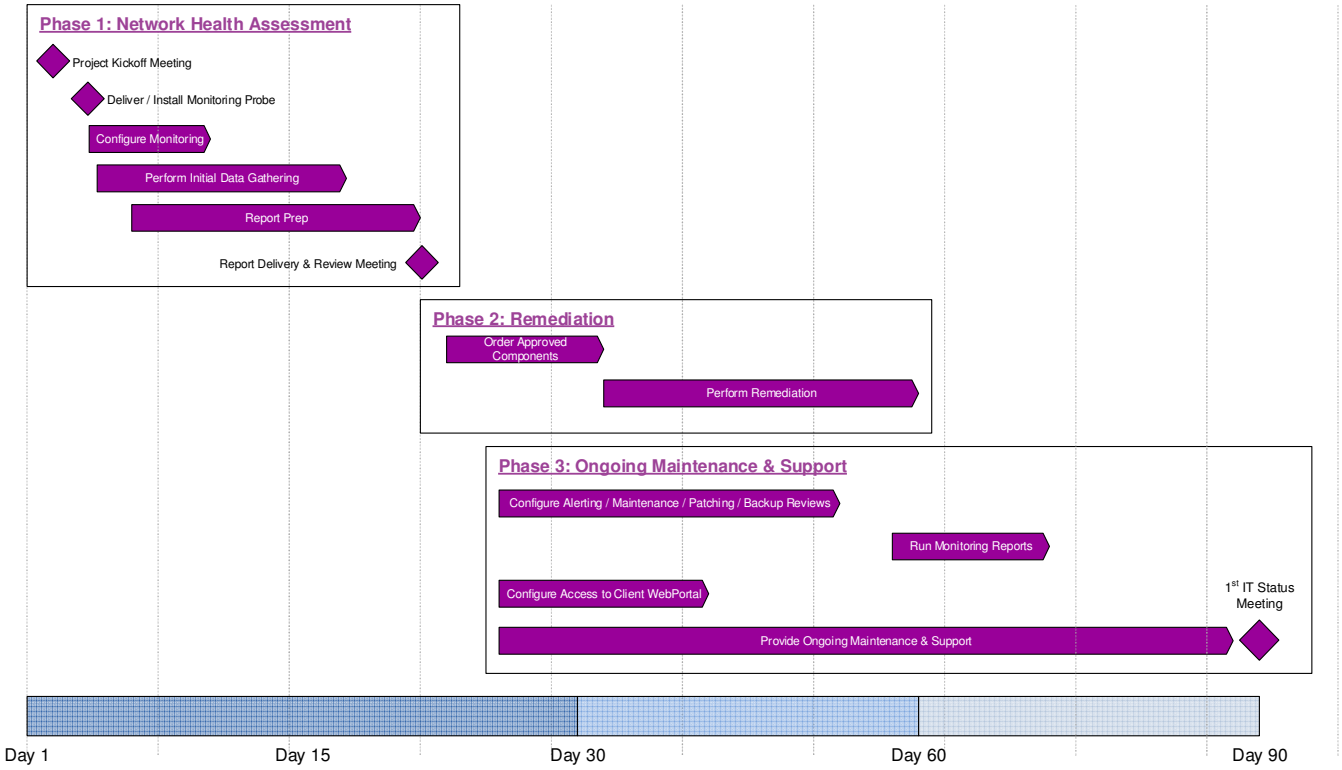
| # | Item | Yearly Cost |
|---|---|---|
| **1.0 IT Staffing Costs** | | |
| 1.1 | Full-time (0 hours per week) In-house IT Staff (Desktop Support)<br>- est. salary of $75,000 per year (w/20% overhead) | $0.00 |
| 1.2 | Part-time Outsourced IT Staff (Mid-Level Network Engineer)<br>- assuming 40 hours per month @ $135.00 per hour | $64,800.00 |
| **2.0 Management Productivity** | | |
| 2.1 | Productivity Cost of Managing 1 In-house IT Staff<br>(0 hours per year at $57.69/hr)<br>- assuming 2 hours per month + 2 hours per quarter (quarterly review meetings)<br>- est. salary of $80,000 per year for supervisor (w/ 20% overhead) | $0.00 |
| 2.2 | Productivity Cost of Managing 1 Outsourced IT Staff<br>(2 hours per month at $46.15/hr)<br>- assuming 2 hours per month<br>- est. salary of $80,000 per year for supervisor (w/ 20% overhead) | $1,107.69 |
| **3.0 Downtime** | | |
| 3.1 | Productivity lost due to Network Downtime (4 hours at $3,461.54/hr)<br>- assuming 100 users down for 2 hours twice a year<br>- est. avg. salary of $60,000 per employee (w/ 20% overhead)<br>- assuming 2080 work hours in a year<br>Service fees due to Network Downtime (4 hours @$150.00/hr)<br>- assuming 4 hours to resolve the cause of the downtime | $13,846.15<br><br><br><br>$600.00 |
| 3.2 | Productivity lost due to Server Crash (16 hours at $3,461.54/hr)<br>- assuming 100 users down for 16 hours once during the year<br>- est. avg. salary of $60,000 per employee (w/ 20% overhead)<br>- assuming 2080 work hours in a year<br>Service fees due to Server Crash (16 hours @$175.00/hr)<br>- assuming 16 hours to rebuild the server plus restore the lost data | $55,384.64<br><br><br><br>$0.00 |
| 3.3 | Productivity lost due to individual Virus or Spyware attack (4 hours at $63.16/hr)<br>- assuming 2 users down (per year) for 4 hours each<br>- est. avg. salary of $60,000 per employee (w/ 20% overhead)<br>Service fees due to Virus or Spyware attack (8 hours @$150.00/hr)<br>- assuming 8 hours to clean the machines of virus and/or spyware | $252.63<br><br><br><br>$1,200.00 |
| | Total Costs: | $137,191.11 |
| | FPA'S *SupportIT (Est.)*: | $55,500.00 |
| | **Total Cost Savings!** | **$81,691.11!** |

This ROI calculation is based on estimates from industry standard data. Naturally, this ROI calculation does not include the intangible added value that FPA brings to this engagement such as our "Best in Class" experience, technical expertise, breadth of services, adherence to industry standard best practices, the quality of our staff, our systems and methodologies, and access to our Client WebPortal.

# 5. Schedule

## 5.1. Initial On-boarding Schedule:

The following provides an overview of how we see the initial phases of our working relationship:

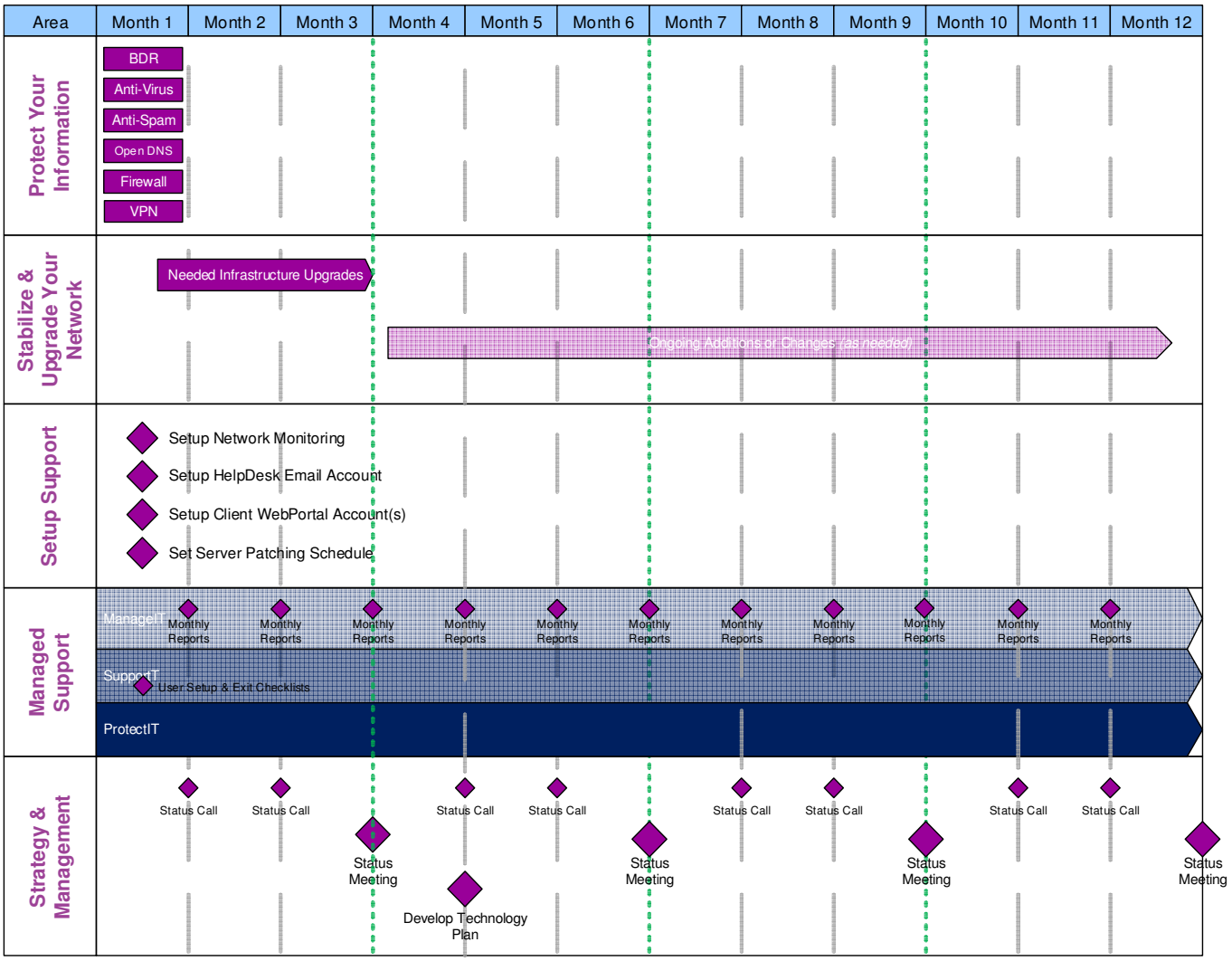


# 5. Schedule (cont.)

## 5.2. Goal Environment:

Our approach to providing ongoing support is based on years of success leveraging industry standard best practices. And as such, we believe a solid and stable core network infrastructure provides the best foundation for success. While every business is different, and the underlying technologies in place to support the goals of the business are as well, through our remediation process we do look to mold the technologies of each of our clients into a uniform base. This ensures improved performance as well as improved quality of service.

The first year of our working relationship can be visualized as follows:



# 6. Summary

## 6.1. Cost Recap:

| # | Description of Services | Cost | Notes / Comments |
|---|---|---|---|
| 1. | FPA Technology Review Project (TRP) | N/C | Note: 50% of this cost would be applied towards payment of one of our Managed Service support plans if selected |
| 2. | Remediation of Network (if needed) | TBD* | Remediate critical issues found during the TRP to be able to effectively provide support under one of our Managed Service support plans |
| 3. | Ongoing Managed IT Services | TBD* | Ongoing monthly fee to remotely monitor, manage, and maintain the network, billed quarterly prior to the start of the quarter. |
| 4. | Specific Projects | Time & Materials | Pre-approved projects performed on an as-needed basis for items outside the scope of the Support Agreement |

** to be determined once the Network Health Assessment phase has been completed*

## 6.2. Guarantee:

We understand that one of the most important aspects of the outsourced IT service provider relationship is based on trust. While we can't guarantee that hardware won't fail, we can guarantee the level of our service. We believe our success is based on the strength of our relationships and we guarantee this. We guarantee that you'll never regret your decision to move forward with FPA. If after 3 months you are unhappy with our service for any reason, you can cancel it. No questions asked. *Business Before Technology*$^{TM}$ – We Get IT! And, we guarantee it!

## 6.3. Miscellaneous:

We understand how important technology is to Golden Rain Foundation and are prepared to begin work under this arrangement immediately. If this proposal correctly expresses our understanding, please sign and date where indicated below and we will create the appropriate Service Level Agreement and return it back to you for signature.

Naturally, please let me know if you have any questions.

Thank you for this opportunity and we look forward to a long and mutually prosperous working relationship.

Sincerely,

Craig Pollack
**Founder & CEO**
**FPA Technology Services, Inc.**
*Computer Consulting & Custom Programming*
craig.pollack@fpainc.com

cc:OM

*fn: ..\golrai\nwaasp(170205).docx*

ACCEPTED: _____ _____
Golden Rain Foundation Date