
Servers and Storage Equipment

Request for Proposal

*Prepared for
City of Whitewater*

July 1, 2024

*Prepared by
Core BTS, Inc.*

<http://www.corebts.com>

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Cover Letter

June 1, 2024

Tim Neubeck - IT Director
Heather Boehm – City Clerk
City of Whitewater
212 W. Whitewater St.
Whitewater, WI 53190

Dear Tim & Heather,

Core BTS, Inc. is pleased to submit our proposal in response to the City of Whitewater RFP – Server & Storage Infrastructure 2024. Core BTS has carefully reviewed the RFP and understands the City of Whitewater is looking to upgrade servers, storage equipment, and upgrades of current operating systems & SQL servers while being supported for a complete turnkey virtual environment with disaster recovery. Core BTS is committed to performing the specifications outlined in the RFP and understands that the City of Whitewater reserves the right to reject any or all submissions, to waive technical or legal deficiencies, to proceed or not with any proposal or process, and to negotiate such terms and conditions of any proposal, agreement, lease, or other contract that may be in the best interest of the city.

Core BTS, Inc. ("Core BTS") is an award-winning corporate and public sector solution provider focused on customer-centric software, cloud technology, and IT infrastructure. Core BTS solves complex needs across networking, collaboration, security, data center, and cloud infrastructure for many industries, including over 20 years of experience working in the public sector. Our capabilities include technical support and managed services of existing infrastructure, security and networking advisory and assessments, and remote monitoring support for hardware and software technologies. The Core BTS team has more than 15 years of experience and holds multiple top-level certifications and partnerships with IT industry-leading companies, allowing us to provide customers with expertise across multiple technologies. Core BTS is recognized as a Microsoft Solutions Partner and Azure Expert MSP, making Core BTS one of the top Microsoft partners in the United States. [Click here to learn more about that partnership.](#)

Core BTS is confident in our ability to deliver on the RFP, including all the solutions requested by the City of Whitewater:

- Servers and storage equipment
- Installation services
- Support services
- Upgrades of current virtual machine operating systems
- SQL server optimization

We have the expertise and experience to refresh your data centers with new hardware and upgrade your Hyper-V, Window servers, and Microsoft SQL to meet your requirements.

Thank you for allowing Core BTS the opportunity to participate in this process, we ask that you select our organization as the partner of choice for your IT Transformation initiatives.

We look forward to working with the City of Whitewater on this effort.

Lisa Bowers, Account Executive
Core BTS, Inc.

Pricing Schedule

Provide a pricing matrix similar to those provided below. The City reserves the right to purchase all or some of the proposed solution. Proposals shall include all costs deemed necessary to cover all contingencies essential to the supply and installation of the specified components and services. These costs include, but are not limited to, hardware, installation, power supplies, virtual technology, software, patch cables, handsets, labor, required permits, licenses, or any other fees or charges that may be imposed in order to complete the project. However, a manufacturer’s multi-year warranty for a period up to five years that is provided as an integral part of an eligible component, without a separately identifiable cost, may be included in the cost of the component. Any cost encountered which is not specifically itemized in the proposal shall not be incurred without the express written consent of the the City. No additional compensation will be paid for extra work incurred on the part of the Contractor due to the failure to discover or acknowledge existing condition which may cause additional labor costs.

Please note: To ensure that the business day is not compromised, work cannot always be scheduled during normal business hours of 8:00am – 4:30pm. Please include the cost of any additional compensation required for work performed in the evenings and on Saturdays.

Hardware, Software, and Licenses – all items should be itemized

Item	Description	Quantity	Unit Price	Total
1				
2				
3				

Labor – Cost of Implementation

Item	Description	Quantity	Unit Price	Total
1				
2				
3				

Training – also indicate training that will be at no additional charge

Item	Description	Quantity	Unit Price	Total
1				
2				
3				

Core BTS Response: Please see the detailed information in the price quote below.

Core BTS Price Quote

UCSC Refuse to Lose M7 Offer

Qty	Item Number	Description	Term (Months)	Billing Frequency	Price	Ext Price
1	UCSC-R2L-OFFER	UCSC Refuse to Lose M7 Offer		Prepaid	\$0.00	\$0.00
1	DC-MGT-SAAS	Cisco Intersight SaaS	60	Prepaid	\$0.00	\$0.00
4	DC-MGT-IS-SAAS-ES	Infrastructure Services SaaS - Essentials	60	Prepaid	\$1,578.68	\$6,314.72
1	SVS-DCM-SUPT-BAS	Basic Support for DCM	60	Prepaid	\$0.00	\$0.00
4	DC-MGT-UCSC-1S	UCS Central Per Server - 1 Server License	60	Prepaid	\$0.00	\$0.00
1	DC-MGT-ADOPT-BAS	Intersight - 3 virtual adoption sessions (Once Only)	60	Prepaid	\$0.00	\$0.00
1	UCSC-C220-M7S-NEW	UCS C220 M7 R2L Free Rack w/oCPU, mem, drv, 1U wSFF HDD/SSD		Prepaid	\$0.00	\$0.00
1	CON-SNT-UCS75C22	SNTC-8X5XNBD UCS C220 M7 Rack w/o UCS C220 M7 Rack w	60	Prepaid	\$2,779.92	\$2,779.92
1	UCSC-O-ID10GC-D	Intel X710T2LOCPV3G1L 2x10GbE RJ45 OCP3.0 NIC		Prepaid	\$0.00	\$0.00
2	UCS-M2-I480GB-D	480GB M.2 Boot SATA Intel SSD		Prepaid	\$0.00	\$0.00
1	UCS-M2-HWRAID-D	Boot optimized M.2 Raid controller		Prepaid	\$0.00	\$0.00
1	UCSX-TPM-002C-D	TPM 2.0, TCG, FIPS140-2, CC EAL4+ Certified, for M6 servers		Prepaid	\$0.00	\$0.00
1	UCSC-RAIL-D	Ball Bearing Rail Kit for C220 & C240 M7 rack servers		Prepaid	\$0.00	\$0.00
1	CIMC-LATEST-D	IMC SW (Recommended) latest release for C-Series Servers.		Prepaid	\$0.00	\$0.00
1	UCSC-HSLP-C220M7	UCS C220 M7 Heatsink for & C240 GPU Heatsink		Prepaid	\$0.00	\$0.00
10	UCSC-BBLKD-M7	UCS C-Series M7 SFF drive blanking panel		Prepaid	\$0.00	\$0.00
31	UCS-DDR5-BLK	UCS DDR5 DIMM Blanks		Prepaid	\$0.00	\$0.00
1	UCSC-FBRS-C220-D	C220M7 HH Riser3 blank		Prepaid	\$0.00	\$0.00
1	UCSC-OC3-KIT-D	C2XX OCP 3.0 Interposer W/Mech Assy		Prepaid	\$0.00	\$0.00
1	UCS-CPU-I4514Y	Intel I4514Y 2.0GHz/150W 16C/30MB DDR5 4400MT/s		Prepaid	\$0.00	\$0.00
1	UCS-MRX32G1RE3	32GB DDR5-5600 RDIMM 1Rx4 (16Gb)		Prepaid	\$0.00	\$0.00
1	UCSC-RIS1A-22XM7	UCS C-Series M7 1U Riser 1A PCIe Gen4 x16 HH		Prepaid	\$0.00	\$0.00
1	UCSC-RIS2A-22XM7	UCS C-Series M7 1U Riser 2A PCIe Gen4 x16 HH		Prepaid	\$0.00	\$0.00
2	UCSC-PSU1-1200W-D	1200W Titanium power supply for C-Series Servers		Prepaid	\$0.00	\$0.00
2	CAB-C13-C14-2M	Power Cord Jumper, C13-C14 Connectors, 2 Meter Length		Prepaid	\$0.00	\$0.00
1	UCSC-DLOM-01-D	Dedicated Mode BIOS setting for C-Series Servers		Prepaid	\$0.00	\$0.00
1	UCS-SID-INFR-OI-D	Other Infrastructure		Prepaid	\$0.00	\$0.00
1	UCS-SID-WKL-MSFTD	Microsoft		Prepaid	\$0.00	\$0.00

Continued ...

Qty	Item Number	Description	Term (Months)	Billing Frequency	Price	Ext Price
1	UCSC-P-IQ10GC-D	Intel X710T4LG 4x10 GbE RJ45 PCIe NIC		Prepaid	\$0.00	\$0.00
3	CON-SNT-UCSCUC27	SNTC-8X5XNBD UCS C220 M7 Rack w/oCPU, mem, drv, 1U wS	60	Prepaid	\$2,779.92	\$8,339.76
3	UCSC-C220-M75	UCS C220 M7 Rack w/oCPU, mem, drv, 1U wSFF HDD/SSD backplane		Prepaid	\$2,593.74	\$7,781.22
3	UCSC-O-ID10GC-D	Intel X710T2LOCPV3G1L 2x10GbE RJ45 OCP3.0 NIC		Prepaid	\$662.27	\$1,986.81
6	UCS-M2-I480GB-D	480GB M.2 Boot SATA Intel SSD		Prepaid	\$420.58	\$2,523.48
3	UCS-M2-HWRAID-D	Boot optimized M.2 Raid controller		Prepaid	\$105.37	\$316.11
3	UCSX-TPM-002C-D	TPM 2.0, TCG, FIPS140-2, CC EAL4+ Certified, for M6 servers		Prepaid	\$26.52	\$79.56
3	UCSC-RAIL-D	Ball Bearing Rail Kit for C220 & C240 M7 rack servers		Prepaid	\$107.80	\$323.40
3	CIMC-LATEST-D	IMC SW (Recommended) latest release for C-Series Servers.		Prepaid	\$0.00	\$0.00
3	UCSC-HSLP-C220M7	UCS C220 M7 Heatsink for & C240 GPU Heatsink		Prepaid	\$0.00	\$0.00
30	UCSC-BBLKD-M7	UCS C-Series M7 SFF drive blanking panel		Prepaid	\$0.00	\$0.00
93	UCS-DDR5-BLK	UCS DDR5 DIMM Blanks		Prepaid	\$0.00	\$0.00
3	UCSC-FBR5-C220-D	C220M7 HH Riser3 blank		Prepaid	\$0.00	\$0.00
3	UCSC-OCP3-KIT-D	C2XX OCP 3.0 Interposer W/Mech Assy		Prepaid	\$0.00	\$0.00
3	UCS-CPU-I4514Y	Intel I4514Y 2.0GHz/150W 16C/30MB DDR5 4400MT/s		Prepaid	\$1,126.55	\$3,379.65
3	UCS-MRX32G1RE3	32GB DDR5-5600 RDIMM 1Rx4 (16Gb)		Prepaid	\$1,143.08	\$3,429.24
3	UCSC-RIS1A-22XM7	UCS C-Series M7 1U Riser 1A PCIe Gen4 x16 HH		Prepaid	\$86.46	\$259.38
3	UCSC-RIS2A-22XM7	UCS C-Series M7 1U Riser 2A PCIe Gen4 x16 HH		Prepaid	\$72.85	\$218.55
6	UCSC-PSU1-1200W-D	1200W Titanium power supply for C-Series Servers		Prepaid	\$259.06	\$1,554.36
6	CAB-C13-C14-2M	Power Cord Jumper, C13-C14 Connectors, 2 Meter Length		Prepaid	\$0.00	\$0.00
3	UCSC-DLOM-01-D	Dedicated Mode BIOS setting for C-Series Servers		Prepaid	\$0.30	\$0.90
3	UCS-SID-INFR-OI-D	Other Infrastructure		Prepaid	\$0.00	\$0.00
3	UCS-SID-WKL-MSFTD	Microsoft		Prepaid	\$0.00	\$0.00
3	UCSC-P-IQ10GC-D	Intel X710T4LG 4x10 GbE RJ45 PCIe NIC		Prepaid	\$645.89	\$1,937.67
					Subtotal:	\$41,224.73

Catalyst 9300 48-port

Qty	Item Number	Description	Term (Months)	Billing Frequency	Price	Ext Price
2	C9300X-48TX-E	Catalyst 9300 48-port mGig data only, Network Essentials		Prepaid	\$8,027.33	\$16,054.66
2	CON-SNT-C9300X47	SNTC-8X5XNBD Catalyst 9300 48-port mGig data only, Ne	60	Prepaid	\$4,050.19	\$8,100.38
2	C9300-DNA-E-48	C9300 DNA Essentials, 48-Port Term Licenses	36	Prepaid	\$0.00	\$0.00
2	C9300-DNA-E-48-3Y	C9300 DNA Essentials, 48-port, 3 Year Term license	36	Prepaid	\$586.77	\$1,173.54
2	C9300-NW-E-48	C9300 Network Essentials, 48-port license		Prepaid	\$0.00	\$0.00
2	SC9300UK9-1712	Catalyst 9300 XE 17.12 UNIVERSAL		Prepaid	\$0.00	\$0.00
2	PWR-C1-715WAC-P	715W AC 80+ platinum Config 1 Power Supply		Prepaid	\$0.00	\$0.00
2	PWR-C1-715WAC-P/2	715W AC 80+ PLATINUM CONFIG 1 SECONDARYPOWER SUPPLY		Prepaid	\$736.64	\$1,473.28
4	CAB-C15-CBN	Cabinet Jumper Power Cord, 250 VAC 13A, C14-C15 Connectors		Prepaid	\$0.00	\$0.00
2	C9300-SSD-NONE	No SSD Card Selected		Prepaid	\$0.00	\$0.00
2	STACK-T1-50CM	50CM Type 1 Stacking Cable		Prepaid	\$58.93	\$117.86
2	CAB-SPWR-30CM	Catalyst Stack Power Cable 30 CM		Prepaid	\$55.99	\$111.98
2	C9000-HSEC	U.S. Export Restriction Compliance license for Catalyst 9000		Prepaid	\$0.50	\$1.00

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Servers & Storage Equipment

City of Whitewater

Qty	Item Number	Description	Term (Months)	Billing Frequency	Price	Ext Price
2	C9K-ACC-RBFT	RUBBER FEET FOR TABLE TOP SETUP 9200 and 9300		Prepaid	\$0.00	\$0.00
2	C9K-ACC-SCR-4	12-24 and 10-32 SCREWS FOR RACK INSTALLATION, QTY 4		Prepaid	\$0.00	\$0.00
2	CAB-GUIDE-1RU	1RU CABLE MANAGEMENT GUIDES 9200 and 9300		Prepaid	\$0.00	\$0.00
2	C9300X-NM-8Y	Catalyst 9300 8 x 10G/25G Network Module SFP+/SFP28		Prepaid	\$1,502.75	\$3,005.50
2	NETWORK-PNP-LIC	Network Plug-n-Play License for zero-touch device deployment		Prepaid	\$0.00	\$0.00
1	WI-CONTRACT-505ENT-M21-DC-01	NASPO ValuePoint State of Wisconsin Cisco PA#505ENT-M21-DATACOMMUN-01, Master Agreement#AR3227 (2021-2026)		Prepaid	\$0.00	\$0.00
Subtotal:						\$30,038.20

AddOn

Qty	Item Number	Description	Term (Months)	Billing Frequency	Price	Ext Price
28	UCS-MRX32G1RE3-AM	32GB DDR5-5600MHz Registered Single Rank x4 1.1V 288-pin CL40 RDIMM		Prepaid	\$204.83	\$5,735.24
Subtotal:						\$5,735.24

NetApp Quote - 139990098

Qty	Item Number	Description	Term (Months)	Billing Frequency	Price	Ext Price
1	FAS2820A	FAS2820A Flash Array Storage System		Prepaid	\$0.00	\$0.00
1	FAS2820-100-C	FAS2820 ZERO DRIVE		Prepaid	\$931.34	\$931.34
1	X-02657-00-N-C	RAIL KIT THIN RND/SQ-HOLE 4-POST ADJ 24-		Prepaid	\$0.00	\$0.00
2	X66240A-05-N-C	Cable 25GbE SFP28-SFP28 Cu 0.5m		Prepaid	\$0.00	\$0.00
8	X6562-R6-N-C	CABLE ETHERNET 5M RJ45 CAT6		Prepaid	\$0.00	\$0.00
2	DATA-AT-REST-ENCRYPTION	Data at Rest Encryption Capable Operating Sys		Prepaid	\$0.00	\$0.00
1	DOC-2820-C	DOCUMENTS FAS2820		Prepaid	\$0.00	\$0.00
6	X336A-2-C	DRIVE PACK 7.2K 12G 2X4TB		Prepaid	\$280.50	\$1,683.00
2	X1170A-C	MEZZANINE 4X10G BASE-T W/IO PLATE		Prepaid	\$747.56	\$1,495.12
2	X800-42U-R6-C	Power Cable,In-Cabinet,C13-C14,-C		Prepaid	\$0.00	\$0.00
1	SW-SMIRROR-CLD-ONTAP-ONE	SW-SMIRROR-CLD-ONTAP-ONE		Prepaid	\$0.00	\$0.00
1	SW-S3-SM-ONTAP-ONE	SW-S3-SM-ONTAP-ONE		Prepaid	\$0.00	\$0.00
1	PS-DEPLOY-STAND-FAS-L	PS DEPLOYMENT,STANDARD,FAS,LOW		Prepaid	\$5,387.73	\$5,387.73
2	FAS2820A-001	FAS2820 HA SYSTEM		Prepaid	\$2,328.47	\$4,656.94
480	SW-ONTAPO-NLSAS-F01-C	SW ONTAP ONE PACKAGE PER-0.1TB NLSAS F01		Prepaid	\$11.80	\$5,664.00
1	CS-4HR-REPLACEMENT	4hr Parts Replacement	60	Prepaid	\$1,250.56	\$1,250.56
1	CS-G1-SE-ADVISOR	SupportEdge Advisor	60	Prepaid	\$6,252.81	\$6,252.81
Subtotal:						\$27,321.50

NetApp Quote - 139989601

Qty	Item Number	Description	Term (Months)	Billing Frequency	Price	Ext Price
1	FAS2820A	FAS2820A Flash Array Storage System		Prepaid	\$0.00	\$0.00

Continued ...

Qty	Item Number	Description	Term (Months)	Billing Frequency	Price	Ext Price
1	FAS2820-100-C	FAS2820 ZERO DRIVE		Prepaid	\$931.34	\$931.34
1	X-02657-00-N-C	RAIL KIT THIN RND/SQ-HOLE 4-POST ADJ 24-		Prepaid	\$0.00	\$0.00
2	X66240A-05-N-C	Cable 25GbE SFP28-SFP28 Cu 0.5m		Prepaid	\$0.00	\$0.00
8	X6562-R6-N-C	CABLE ETHERNET 5M RJ45 CAT6		Prepaid	\$0.00	\$0.00
2	DATA-AT-REST-ENCRYPTION	Data at Rest Encryption Capable Operating Sys		Prepaid	\$0.00	\$0.00
1	DOC-2820-C	DOCUMENTS FAS2820		Prepaid	\$0.00	\$0.00
6	X336A-2-C	DRIVE PACK 7.2K 12G 2X4TB		Prepaid	\$280.50	\$1,683.00
2	X1170A-C	MEZZANINE 4X10G BASE-T W/IO PLATE		Prepaid	\$747.56	\$1,495.12
2	X800-42U-R6-C	Power Cable,In-Cabinet,C13-C14,-C		Prepaid	\$0.00	\$0.00
1	SW-SMIRROR-CLD-ONTAP-ONE	SW-SMIRROR-CLD-ONTAP-ONE		Prepaid	\$0.00	\$0.00
1	SW-S3-SM-ONTAP-ONE	SW-S3-SM-ONTAP-ONE		Prepaid	\$0.00	\$0.00
1	PS-DEPLOY-STAND-FAS-L	PS DEPLOYMENT,STANDARD,FAS,LOW		Prepaid	\$5,387.83	\$5,387.83
120	ED-TU-1-ZA	TRAINING UNITS 1 ZA EXP.1YR FROM INVOICE		Prepaid	\$70.90	\$8,508.00
2	FAS2820A-001	FAS2820 HA SYSTEM		Prepaid	\$2,328.16	\$4,656.32
480	SW-ONTAPO-NLSAS-F01-C	SW ONTAP ONE PACKAGE PER-0.1TB NLSAS F01		Prepaid	\$11.80	\$5,664.00
1	CS-4HR-REPLACEMENT	4hr Parts Replacement	60	Prepaid	\$1,250.56	\$1,250.56
1	CS-G1-SE-ADVISOR	SupportEdge Advisor	60	Prepaid	\$6,252.81	\$6,252.81
					Subtotal:	\$35,828.98

Services

Qty	Item Number	Description	Term (Months)	Billing Frequency	Price	Ext Price
1.00	CORE-PS-NTWRK-QOFF	Network Professional Services		Prepaid	\$99,840.00	\$99,840.00
					Subtotal:	\$99,840.00

Freight

Qty	Item Number	Description	Term (Months)	Billing Frequency	Price	Ext Price
1	CORE-NOFGHT	No freight charge to client		Prepaid	\$0.00	\$0.00
					Subtotal:	\$0.00

First Invoice Amount: \$239,988.65
Quote Subtotal: \$239,988.65
Estimated Sales Tax: \$9,314.27
Quote Total: \$249,302.92

Maintenance and Support

If discounts are available for multi-year support agreements, please provide this information regarding the length of term and the net discount percentage. The maintenance cost should include the all-inclusive hourly charge rates (during specified hours), any travel expenses to be reimbursed, the percentage of markup on any materials.

Maintenance quote requirements—Warranty and graduated maintenance proposal with year 1 to year 10 pricing and specifications; i.e., monitoring, labor, and equipment. Maintenance is to be quoted separately unless the warranty is not a separately identifiable cost. In this case, the warranty should be noted for information purposes.

Item	Description	Discount	Length of Term	Total
1	Full maintenance: supporting hardware and software 7am-6pm Mon-Fri with 4-hour onsite response	Cisco – 31.25% NetApp – 51.73%, parts replacement; 75% support.	Cisco – five years. NetApp – five years.	Cisco – \$19,220.06 NetApp - \$15,006.74
2	Full maintenance: supporting hardware and software seven (7) days a week, 24 hours a day, with four (4) hour onsite response	Not applicable, not recommended, per recent conversation with key client contacts.	Not applicable, not recommended, per recent conversation with key client contacts.	Not applicable, not recommended, per recent conversation with key client contacts.
3	What is your plan for emergency response in case of critical failure? Do you have an emergency response plan with one (1) hour or less response? If so please explain and include pricing. If not, so indicate.	Core BTS does offer such emergency response services via a Professional Support Contract. (Remote support only.) No details are being provided as key client contacts indicated that this is not required at this time. Should the City of	Core BTS does offer such emergency response services via a Professional Support Contract. (Remote support only.) No details are being provided as key client contacts indicated that this is not required at this time. Should the City of	Core BTS does offer such emergency response services via a Professional Support Contract. (Remote support only.) No details are being provided as key client contacts indicated that this is not required at this time. Should the City of

		Whitewater become interested in such services in the future, please contact Lisa Bowers, Core BTS Account Executive and she can provide details at that time.	Whitewater become interested in such services in the future, please contact Lisa Bowers, Core BTS Account Executive and she can provide details at that time.	Whitewater become interested in such services in the future, please contact Lisa Bowers, Core BTS Account Executive and she can provide details at that time.
4	If City of Whitewater chooses time and materials coverage, what is the rate for standard business hours and after hours? State your definition of business hours.	Please see the detailed information provided below for item 3.d. in the Project Response section.	Please see the detailed information provided below for item 3.d. in the Project Response section.	Please see the detailed information provided below for item 3.d. in the Project Response section.
5	Will your company support a maintenance contract that covers core components only (e.g. servers, software, switches and common control cards) with no peripherals, or station sets?	Yes, Core BTS can offer such a support and maintenance contract.	Up to five years, depending on client preference.	TBD, once the list of core components to be covered has been finalized.
6	Propose the maintenance you believe would best serve the City.	Please see the response in item 1 above.	Please see the response in item 1 above.	Please see the response in item 1 above.

Other Costs

Respondent must list any and all charges, expenses, and/or costs to be incurred by the City that are not included in this section. Failure to specifically and thoroughly enumerate such items may be a cause for disqualification.

Core BTS Response: The only other costs for this engagement beyond the items listed in the price quote above are the travel and expense which will be billed as follows:

Travel expenses will be billed to the City of Whitewater on a pass-through basis and may include:

- **Mileage and parking – at cost**
- **Meals – at cost**
- **Lodging – at cost**

Travel time is billed for the time incurred for a one-way trip to the client's location.

All travel expenses shall adhere to the mutually agreed upon City of Whitewater and Core BTS Travel and Expense ("T&E") policies during the project. Any expenses to be paid by City of Whitewater shall be duly documented with the corresponding invoices.

Project Requirements

- Single Point of Responsibility
 - The City expects to have a single point of contact, i.e. a single point of authority and a single contracting entity for this project. The City will not enter into any agreement that does not provide a single point of accountability for the installation of the system. If the vendor utilizes any subcontractors for any part of the system architecture, design, planning, installation or support, it should be understood that the successful respondent will be the sole responsible party for all activities. It is the intent of this RFP that the responder provides a complete, end to end solution for the installation. The vendor shall provide design, planning, system architecture, installation, network analysis, training, and post-installation support for the project. The City of Whitewater IT department will act as the consultant and single point of responsibility for the City.

Core BTS Response: Read, understood, and will comply.

- Training
 - The IT department will receive training from the vendor as part of “knowledge transfer” during and after implementation of virtualized server and storage infrastructure. Training to become self-sufficient in the configuration and operation of the virtualized server and storage infrastructure should be included for up to four employees. At the completion of the implementation, provide full system documentation including a full inventory of all products, licenses, configuration, and design. This should include the location of equipment/license, description/specifications, model, and serial number.
 - Training should also include necessary written documentation, diagrams, cheat sheets, or FAQs.
 - Include the following training:
 - Hardware and software management training
 - Storage platform training
 - Backup target platform training

Core BTS Response: Read, understood, and will comply.

- Inventory
 - An inventory of all deployed hardware to include serial number, model, and location is required.

Core BTS Response: Read, understood, and will comply.

Project Response

1. Describe the overall architecture of the system.
 - a. Provide diagrams of the major system components. How will they connect to the existing City network?

Core BTS Response: Read, understood, and have complied. Please see the information provided in the Diagrams Appendix which is being submitted as part of this response.

- b. Provide any hardware/software requirements for servers to support the virtualized server infrastructure.

Core BTS Response: In order to provide these details, the Core BTS team will need additional information from key stakeholders with the City of Whitewater. For your reference in this regard, please see the information provided regarding the server components in the Data Sheets Appendix which is being submitted as part of this response.

- c. Indicate your inability to furnish a feature listed in this document by highlighting it in your response.

Core BTS Response: Not applicable, as the Core BTS proposal provides a response for all required features in the RFP.

- d. Indicate any additional features that are not noted but are included in the recommended system as well as any that set your virtualized server infrastructure and/or storage components apart from your competitor's products and services.

Core BTS Response: The key features that distinguish the system recommended in this proposal are the ease with which it can be integrated into the City's current computing environment, as well as the "expandability" that is built into the design, which will ensure that future updates and upgrades can be done in a cost-effective manner.

- e. Provide all necessary documentation of the system including product literature, and spec sheets.

Core BTS Response: Read, understood, and have complied. Please see the Data Sheets Appendix which is being submitted as part of this response.

2. Provide a full system quote based on the requirements listed in this document.
 - a. The vendor is welcome to provide a quote for all or a portion of the requirements as desired.

Core BTS Response: Read, understood, and have complied. Please see the information provided in the Pricing Schedule section above.

- b. The City reserves the right to purchase equipment/services from more than one vendor as it is advantageous to the district.

Core BTS Response: Read and understood.

- 3. Implementation
 - a. Provide a project plan to transition existing virtual infrastructure and storage infrastructure to the new virtual infrastructure and storage infrastructure. This plan needs to include a minimum and maximum amount of downtime.

Core BTS Response: Read, understood, and have complied. Please see the information provided in the Project Plan section below.

- b. Provide pricing for the "turnkey" implementation service where all tasks are completed by the vendor.

Core BTS Response: Read, understood, and have complied. Please see the information provided in the Pricing Schedule section above.

- c. Provide pricing for engineering, project management, and other critical, high-level services with minimum work provided by City IT staff and contractors.

Core BTS Response: Read, understood, and have complied. Please see the information provided in the Pricing Schedule section above.

- 4. Maintenance and Support.
 - a. Provide pricing for any other optional maintenance and support contracts/services.

Core BTS Response: Read, understood, and have complied. Please see the information provided in the Pricing Schedule, Maintenance and Support, and Other Costs sections above.

- b. Note if the maintenance contract is partner/manufacture maintenance or direct manufacturer maintenance.

Core BTS Response: Read, understood, and have complied. Please see the information provided in the Maintenance and Support section above.

- c. Does the vendor offer any "value-adds" such as regular system checkups, system upgrades, or any type of preventative maintenance?

Core BTS Response: Core BTS does offer these "value-adds" through the Managed Services solutions provided by our Network Operations Center located in Madison, WI. Please contact Lisa Bowers, Core BTS Account Executive, and she will provide additional details regarding the various options available.

- d. For any items/services outside of the service contract, provide your company’s time and materials charge.
 - i. Does that charge differ outside of normal business hours?
 - ii. What is your company’s definition of normal business hours?
 - iii. Does your company charge for travel time for services?

Core BTS Response:

Time and Materials Rate Tables.

Microsoft services.

Resource	Hourly Rate
Project Manager	\$215.00
Network Engineer	\$235.00
UCS_Storage Engineer	\$245.00
Microsoft Engineer	\$245.00
Technical Oversight	\$270.00

Infrastructure services (Cisco, NetApp).

Resource	Hourly Rate
Principal Architect	\$270.00
Solution Architect	\$235.00
Senior Consultant	\$210.00
Engagement Manager	\$185.00
Technical Oversight	\$270.00

Normal business hours are 8:00 am to 5:00 pm local (Central) time, Monday through Friday, excepting national holidays. The charge for all after hours work is 1.5 times the regular rate, Monday – Friday, and 2 times the regular rate on weekends and holidays.

Core BTS bills in one-hour increments with a minimum of a two-hour charge for support requests.

Travel expenses will be billed to the City of Whitewater on a pass-through basis and may include:

- Mileage and parking – at cost
- Meals – at cost
- Lodging – at cost

Travel time is billed for the time incurred for a one-way trip to the client's location.

All travel expenses shall adhere to the mutually agreed upon City of Whitewater and Core BTS Travel and Expense ("T&E") policies during the project. Any expenses to be paid by City of Whitewater shall be duly documented with the corresponding invoices.

- e. Provide any ongoing maintenance costs to be incurred by the City.

Core BTS Response: Read, understood, and have complied. Please see the information provided in the Maintenance and Support section above.

Project Plan – Core BTS Scope of Work

City of Whitewater (“City of Whitewater”) is soliciting sealed bids to purchase servers and storage equipment in addition to services including installation, support, upgrades of current virtual machine operating systems, and SQL server optimization for a complete turnkey virtual environment with disaster recovery. Upon conclusion of this initiative, City of Whitewater envisions their primary and secondary data centers’ compute, networking, and storage refreshed with new hardware and their Hyper-V, Windows servers operating systems upgraded to Windows Server 2022 with Microsoft SQL upgraded to at least SQL 2016. Core BTS, Inc. (“Core BTS”) would like to position its experience in these technologies, as well as its status as a Microsoft Cloud Solutions Partner and Azure Expert Managed Services Provider (“MSP”), as evidence that it can be a trusted advisor to City of Whitewater to provide guidance, expertise, and implementation execution.

Project Work Estimate and Timeline

Whitewater - Server and Storage Infrastructure 2024							
Project Management	W1	W2	W3	W4	W5	W6	W7
Project Management							

Phase 1: Infrastructure Refresh							
Discover and Plan	W1	W2	W3	W4	W5	W6	W7
Discover and Plan							
Build							
Stabilize							
Deploy							

Phase 2: OS and Application Upgrades							
Discover and Plan	W1	W2	W3	W4	W5	W6	W7
Discover and Plan							
Build							
Stabilize							
Deploy							

Project Delivery

During project delivery, Core BTS will provide consultants to deliver best practice, technical guidance, and execution for the implemented technologies and solutions described in this section. This project model includes the following phases: Discover and Plan, Build, Stabilize, and Deploy.

Project Monitoring

The key goals of this workstream include monitoring project activities (such as scope, timeline, and budget) and providing routine status communications to stakeholders throughout the duration of the project.

Project Monitoring Activities

High-level tasks that may be performed during this workstream include:

- Project Initiation and Logistics
 - Coordinate and conduct internal and external project kickoff
 - Completion of other Project Initiation Activities
 - Validate Entry Criteria
- Scope, Timeline, and Budget Management
 - Create and maintain budget and timeline materials
- Communication and Stakeholder Management
 - Create and maintain status reports
 - Coordination and routine communication of project activities and budget to internal and client management stakeholders
- Quality and Risk Management
 - Escalation point of contact for the project between the project and client team
 - Track risks, actions, issues, and decisions

Project Monitoring Assumptions

Assumptions made surrounding this workstream's work efforts include:

1. Core BTS and City of Whitewater will confirm and refine the timeline during Discovery and Plan phase to ensure proper alignment and preparedness of sequential tasks.
2. City of Whitewater will coordinate with Core BTS technical resources for hardware, accounts, or access as needed.
3. City of Whitewater will provide a Project Manager to manage client resources and project-related tasks.

Project Monitoring Timeline

Project Management	W1	W2	W3	W4	W5	W6	W7
Project Management							
Project Initiation Activities and Logistics							
Scope, Timeline, and Budget Management							
Communication and Stakeholder Management							
Quality and Risk Management							

Infrastructure Refresh Workstream

The key goals of this workstream include refreshing the data centers hardware and upgrading the Hyper-V version to 2022. Toward this end, Core BTS will design and implement a data center upgrade project.

Discover and Plan Phase

The Discover and Plan phase of this workstream will establish the foundation for the remainder of the project. This phase will solidify the plan for the remaining efforts and bring together the various aspects of this workstream into a cohesive vision and solution.

High-level tasks that may be performed during this phase for this workstream include:

- Define business and functional requirements
 - Prepare requirements to support the desired functionality
- Identify priorities for each of the requirements
- Discovery/Planning Workshops
 - Discover core network infrastructure systems/environments
 - Discover Edge Firewall Configuration
 - Discover Edge switching/routing configuration

- Discover remaining switching/routing configuration
- Develop core infrastructure upgrade strategies (Network, IP Addressing, DNS, DHCP, Remote Access/VPN)
- Discover Infrastructure systems/environments
 - Identify the virtualization platform(s) in use (Hyper-V)
 - Review integration with Active Directory
 - Review storage and networking configuration for virtualization platforms.
- Discover Microsoft Active Directory environment
 - Discover Active Directory DS environments
 - Discover File and Print Environment
 - Discover end-user environments
- Authentication Identification
 - Evaluate the authentication mechanisms in the environment: ADFS, MFA, other
- Deploy and Run Information Gathering Scripts
 - Use a jump box workstation to run the information gathering scripts and collect the data
- Review Existing Backup
 - Validate that it can support the new storage and server deployment strategy
- Initial Migration Planning
 - Develop network routing/switching upgrade strategy
 - Develop infrastructure upgrade for NetApp storage deployment strategy
 - Develop Cisco UCS server deployment strategy
 - Develop Microsoft Hyper-V upgrade from Windows 2016 to Windows 2022 strategy
 - Develop High Availability/DR environment deployment strategy
 - Develop Backup/DR environment strategy
- Conduct an Infrastructure Upgrade Strategy Review Meeting

Deliverables

This phase will be complete when Core BTS has completed all outcomes and documents listed below and they have been reviewed with the City of Whitewater Program Manager.

Phase Outcomes

- Discovery and planning for the infrastructure upgrade
- Initial upgrade approach and requirements

Phase Documents

Document Name	Revision	Document Content
Infrastructure Upgrade Architecture Plan Document	Initial	<ul style="list-style-type: none"> • Executive Summary • Current State Review • Target State Architectural Model • High-level Roadmap

Build Phase

The Build phase of this workstream primarily involves developing the solutions and content required for go-live. During this phase, all key elements of the technical solution and deployment process must be carefully engineered and validated.

High-level tasks that may be performed during this phase for this workstream include:

- Deploy Network Switch at Primary datacenter
 - Perform configuration and testing of deployment
- Deploy Network Switch at Secondary datacenter
 - Perform configuration and testing of deployment
- Deploy and Configure NetApp SAN Storage
 - Rack NetApp equipment
 - Connect network wiring to NetApp equipment
 - Perform initial configuration of NetApp equipment
 - Configure LUNs and SMB shares
 - Configure Snapshots and storage allocation(s)
- Upgrade 3-Node Hyper-V Cluster from Windows 2016 to Windows 2019
 - Vacate all VMs from Node 1 and place in maintenance mode
 - Perform in-place OS upgrade from Windows Server 2016 to Windows Server 2019
 - Take Node 1 out of maintenance mode and return to active participation in the cluster
 - Vacate all VMs from Node 2 and place in maintenance mode

- Perform in-place OS upgrade from Windows Server 2016 to Windows Server 2019
- Take Node 2 out of maintenance mode and return to active participation in the cluster
- Vacate all VMs from Node 3 and place in maintenance mode
- Perform in-place OS upgrade from Windows Server 2016 to Windows Server 2019
- Take Node 3 out of maintenance mode and return to active participation in the cluster
- Raise the Hyper-V cluster functional level to Windows 2019
- Upgrade 1-Node DR Hyper-V Cluster from Windows 2016 to Windows 2019
 - Power off all VMs hosted on the 1-Node in the DR Hyper-V cluster
 - Place DR Node 1 in maintenance mode
 - Perform and in-place upgrade from Windows Server 2016 to Windows Server 2019
 - Take DR Node 1 out of maintenance mode
 - Power on the VMs hosted on DR Node 1
 - Raise the Hyper-V cluster functional level to Windows 2019
- Deploy 3 Cisco UCS Servers in Primary Datacenter
 - Deploy and Configure Cisco Intersight for the management of the Cisco UCS servers
 - Create and apply Intersight server profiles to the UCS servers
 - Set up remote management/KVM access to each of the UCS servers
 - Install Windows Server 2022 as the OS for each of the Cisco UCS servers
 - Add the Windows 2022 servers to the existing active directory domain
 - Connect the Cisco UCS servers to the NetApp storage array via iSCSI
 - Install the Hyper-V feature on each of the three Windows 2022 servers
- Deploy 1 Cisco UCS Server in Secondary Datacenter for DR
 - Deploy and Configure Cisco Intersite for the management of the Cisco UCS servers
 - Create and apply Intersite server profiles to the UCS servers
 - Set up remote management/KVM access to each of the UCS servers
 - Install Windows Server 2022 as the OS for the Cisco UCS server
 - Add the Windows 2022 server to the existing active directory domain
 - Connect the Cisco UCS server to the NetApp storage array via iSCSI

- Install the Hyper-V feature on the Windows 2022 server
- Add Windows 2022 Servers to Hyper-V Cluster in Primary Datacenter
 - Using System Center Virtual Machine Manager (“SCVMM”) add the Windows Server 2022 Nodes to the existing Hyper-V cluster
 - Add the NetApp Storage volumes to the Hyper-V cluster
 - Create a small test VM on Windows 2022 Node 1
 - Live Migrate the test VM from Windows 2022 Node 1 to Windows 2022 Node 2
 - Live Migrate the test VM from Windows 2022 Node 2 to Windows 2022 Node 3
- Upgrade the Hyper-V Cluster from Windows 2019 to Windows 2022 in Primary Datacenter
 - Add a cluster file share witness that does not reside on one of the Windows 2019 Nodes
 - Create a small NetApp LUN for the file share witness and deploy from the SCVMM console
 - Migrate the pre-existing VMs in the Hyper-V cluster from the Windows 2019 Nodes to the Windows 2022 Nodes
 - This will require an offline migration and downtime for each VM to be migrated as the VMs are using local storage rather than cluster shared storage
 - After migrating each VM to a Windows 2022 Node, power on the VM and verify connectivity with the network, AD, applications, and end users
 - When all VMs have been migrated from Windows 2019 nodes to Windows 2022 nodes, remove the Windows 2019 nodes from the Hyper-V cluster
 - Raise the Hyper-V cluster functional level to Windows 2022
- Upgrade the Hyper-V Cluster from Windows 2019 to Windows 2022 in Secondary Datacenter
 - Add a cluster file share witness that does not reside on the Windows 2019 Node
 - Create a small NetApp LUN for the file share witness and deploy from the SCVMM console
 - Migrate the pre-existing VMs in the Hyper-V cluster from the DR Windows 2019 Node to the DR Windows 2022 Node
 - This will require an offline migration and downtime for each VM to be migrated as the VMs are using local storage rather than cluster shared storage

- After migrating each VM to the DR Windows 2022 Node, power on the VM and verify connectivity with the network, AD, applications, and end users
- When all VMs have been migrated from the DR Windows 2019 node to Windows 2022 node, remove the Windows 2019 node from the Hyper-V cluster
- Raise the Hyper-V cluster functional level to Windows 2022
- Deploy Windows Admin Center to Manage the Hyper-V Cluster(s)
 - Install Windows Server 2022 Core edition
 - Install Windows Admin Center on the Windows Server 2022 Core edition VM
 - Add existing VMs to Windows Admin Center for Management and Performance Monitoring
- Add the new Windows 2022 Hyper-V environment into the daily backup routine

Deliverables

This phase will be complete when Core BTS has completed all outcomes and documents listed below and they have been reviewed with the City of Whitewater Program Manager.

Phase Outcomes

- The new network switches have been successfully deployed.
- The new NetApp SAN has been successfully deployed and configured for the Hyper-V cluster.
- The Hyper-V cluster(s) in Production and DR have been upgraded to Windows 2022.

Phase Documents

Document Name	Revision	Document Content
Infrastructure Upgrade Architecture Plan Document	Updated	<ul style="list-style-type: none"> ● Executive Summary ● Current State Review ● Target State Architectural Model ● High-level Roadmap

Stabilize Phase

The Stabilize phase of this workstream involves testing the technologies configured during the Build phase and performing any necessary reconfiguration based on testing feedback.

The goal of the Stabilize phase is to ensure that all implemented technologies are operating to specification and ready to support the Deploy phase activities.

High-level tasks that may be performed during this phase for this workstream include:

- Test and Validate the Windows 2022 Hyper-V Cluster
 - Perform live VM migrations from one node to another node
 - Simulate node failure test
- Test and Validate the Windows 2022 DR Hyper-V Cluster
- Validate that VMs are completing successful backups

Deliverables

This phase will be complete when Core BTS has completed all outcomes and documents listed below and they have been reviewed with the City of Whitewater Program Manager.

Phase Outcomes

- Windows 2022 Hyper-V cluster tested for production.

Phase Documents

Document Name	Revision	Document Content
Infrastructure Upgrade Architecture Plan Document	Updated	<ul style="list-style-type: none"> • Executive Summary • Current State Review • Target State Architectural Model • High-level Roadmap

Deploy Phase

The Deploy phase of this workstream involves implementing the technologies built and tested in the previous phases. The goal of the Deploy phase is to successfully execute the plans and solutions created throughout this workstream with minimal impact to the business.

High-level tasks that may be performed during this phase for this workstream include:

- Release the Windows 2022 Hyper-V cluster to production
 - Release the Windows 2022 DR Hyper-V cluster to production
- Perform Knowledge Transfer with Whitewater IT Staff

- Review cluster node update procedure for Windows updates
- Finalize the Architecture Plan Document
- Conduct a completion meeting

Deliverables

This phase will be complete when Core BTS has completed all outcomes and documents listed below and they have been reviewed with the City of Whitewater Program Manager.

Phase Outcomes

- Hyper-V infrastructure upgraded to Windows Server 2022 and deployed for production.

Phase Documents

Document Name	Revision	Document Content
Infrastructure Upgrade Architecture Plan Document	Final	<ul style="list-style-type: none"> • Executive Summary • Current State Review • Target State Architectural Model • High-level Roadmap

Infrastructure Refresh Entry Criteria

City of Whitewater will implement the following prior to project kickoff:

1. All hardware has been delivered and is onsite.
2. Domain Admin permissions for the Microsoft consultants.
3. SQL sysadmin permissions for the Microsoft consultants.
4. All licensing obtained.
5. Unattended remote access to the relevant network, servers, and any other applicable devices has been provided by City of Whitewater to the Core BTS project team.
6. Unattended admin permissions to the relevant networks, servers, cloud tenants and resources, and any other relevant devices and services has been granted by City of Whitewater to the Core BTS project team.
7. Relevant technical schemas, documentation, and access to equipment necessary for this workstream have been gathered and provided by City of Whitewater to the Core BTS project team.

Infrastructure Refresh Assumptions

Assumptions made surrounding this workstream’s work efforts include:

1. A three (3) node Hyper-V cluster with hardware will be deployed to the primary data center and a one (1) node Hyper-V cluster with hardware will be deployed in the secondary data center.
2. Client has valid backups of all VMs

Infrastructure Refresh Timeline

Phase 1: Infrastructure Refresh	W1	W2	W3	W4	W5	W6	W7
Discover and Plan							
Workstream Kick-off Meeting							
Discovery/Planning Workshops							
Deploy and Run Information Gathering Scripts							
Review Existing Backup							
Initial Migration Planning							
Objective: Complete discovery and planning for the infrastructure upgrade							
Objective: Initial Upgrade Approach and Requirements							
Deliverable: Initial Infrastructure Upgrade Architecture Plan Document							
Conduct an Infrastructure Upgrade Strategy Review Meeting							
Build							
Technical Oversight							
Deploy Network Switch at Primary datacenter							
Deploy Network Switch at Secondary datacenter							
Deploy and Configure NetApp SAN Storage							
Upgrade 3-Node Hyper-V Cluster from Windows 2016 to Windows 2019							
Upgrade 1-Node DR Hyper-V Cluster from Windows 2016 to Windows 2019							
Deploy 3 Cisco UCS Servers in Primary Datacenter							
Deploy 1 Cisco UCS Server in Secondary Datacenter for DR							
Add Windows 2022 Servers to Hyper-V Cluster in Primary Datacenter							
Upgrade the Hyper-V Cluster from Windows 2019 to Windows 2022 in Primary Datacenter							
Upgrade the Hyper-V Cluster from Windows 2019 to Windows 2022 in Secondary Datacenter							
Deploy Windows Admin Center to Manage the Hyper-V Cluster(s)							
Add the new Windows 2022 Hyper-V environment into the daily backup routine							
Objective: The new network switches have been successfully deployed							
Objective: The new NetApp SAN has been successfully deployed and configured for the Hyper-V cluster							
Objective: The Hyper-V cluster(s) in Production and DR have been upgraded to Windows 2022							
Deliverable: Updated Architecture Plan Document							
Stabilize							
Technical Oversight							
Test and Validate the Windows 2022 Hyper-V Cluster							
Test and Validate the Windows 2022 DR Hyper-V Cluster							
Validate that VMs are completing successful backups							
Objective: Windows 2022 Hyper-V cluster tested for production							
Deliverable: Updated Architecture Plan Document							
Deploy							
Technical Oversight							
Release the Windows 2022 Hyper-V cluster to production							
Perform Knowledge Transfer with Whitewater IT Staff							
Finalize the Architecture Plan Document							
Deliverable: Final version of Architecture Plan Document							
Conduct a completion meeting							

Operating System and Application Upgrades

Workstream

The key goals of this workstream include updating the Windows Server operating systems to Windows Server 2022 and Microsoft SQL versions to at least version SQL 2016. Toward this end, Core BTS will perform OS and SQL upgrades.

Discover and Plan Phase

The Discover and Plan phase of this workstream will establish the foundation for the remainder of the project. This phase will solidify the plan for the remaining efforts and bring together the various aspects of this workstream into a cohesive vision and solution.

High-level tasks that may be performed during this phase for this workstream include:

- Define business and functional requirements
 - Prepare requirements to support the desired functionality
- Identify priorities for each of the requirements
- Review OS versions on each of the VMs that support an upgrade
 - Review which servers require OS upgrades only
 - Review which servers require SQL upgrades
 - Validate versions of OS and Application compatibility with 3rd party vendor support
- Create a schedule for the OS and SQL upgrades
 - Verify 3rd party vendor support for each upgrade

Deliverables

This phase will be complete when Core BTS has completed all outcomes and documents listed below and they have been reviewed with the City of Whitewater Program Manager.

Phase Outcomes

- Create a schedule for OS and SQL upgrades.

Phase Documents

Document Name	Revision	Document Content
Upgrade Schedule	Final	<ul style="list-style-type: none"> Dates and time for updates for OS and SQL

Build Phase

The Build phase of this workstream primarily involves developing the solutions and content required for go-live. During this phase, all key elements of the technical solution and deployment process must be carefully engineered and validated.

High-level tasks that may be performed during this phase for this workstream include:

- Perform Windows Server OS Upgrades
 - Domain Controller Upgrade to Windows 2022
 - Demote domain controller to domain member
 - Perform in-place OS upgrade to Windows 2022
 - Verify new Windows 2022 servers meet the AD DS requirements
 - Configure AD DS services on new domain controllers
 - Configure AD DS sites and services with new domain controllers
 - Validate new domain controller functionality
 - Upgrade Windows Server OS on VMs not running MS SQL
 - Verify any applications or services running on the Windows VM(s)
 - Check Server OS compatibility with MS best practices
 - Perform in-place upgrade of Windows Server OS to 2016/2019/2022 based on application and/or service compatibility
- Deploy New SQL Server for Police Application Hosting
 - Verify the latest version of SQL that the hosted application(s) support with the application vendor support
 - Install the latest Windows Server OS that is supported by the application(s): Windows Server 2016/2019/2022
 - Install the latest Microsoft SQL version that the hosted application(s) support: SQL 2016/2019/2022
 - Migrate police application databases from pre-existing SQL server to new SQL server
 - Validate application connectivity to the databases

- Upgrade Existing Microsoft SQL Server with New OS and SQL Versions
 - Verify the latest version of SQL that the hosted application(s) support.
 - Upgrade pre-existing SQL version to level compatible with Windows Server OS potential upgrade version
 - Perform in-place upgrade of Windows Server OS to 2016/2019/2022 based on SQL application compatibility

Deliverables

This phase will be complete when Core BTS has completed all outcomes and documents listed below and they have been reviewed with the City of Whitewater Program Manager.

Phase Outcomes

- Upgrade as many of the VMs to the latest version of Windows Server OS

Stabilize Phase

The Stabilize phase of this workstream involves testing the technologies configured during the Build phase and performing any necessary reconfiguration based on testing feedback. The goal of the Stabilize phase is to ensure that all implemented technologies are operating to specification and ready to support the Deploy phase activities.

High-level tasks that may be performed during this phase for this workstream include:

- Test Connectivity of upgraded Windows Servers
 - Remediate any reported issues with server communication or availability
- Test end user connectivity for Upgraded SQL Servers
 - Validate end user application connectivity to the databases
 - Remediate any reported issues with server communication or availability

Deliverables

This phase will be complete when Core BTS has completed all outcomes and documents listed below and they have been reviewed with the City of Whitewater Program Manager.

Phase Outcomes

- Servers capable of an OS upgrade are complete, SQL has been upgraded.

Deploy Phase

The Deploy phase of this workstream involves implementing the technologies built and tested in the previous phases. The goal of the Deploy phase is to successfully execute the plans and solutions created throughout this workstream with minimal impact to the business.

High-level tasks that may be performed during this phase for this workstream include:

- Perform Knowledge Transfer with Whitewater IT Staff
 - Review cluster node update procedure for Windows updates
- Finalize the Architecture Plan Document
- Conduct a completion meeting

Deliverables

This phase will be complete when Core BTS has completed all outcomes and documents listed below and they have been reviewed with the City of Whitewater Program Manager.

Phase Outcomes

- Windows server OS upgraded to Windows Server 2022 and MS SQL upgraded to at least SQL 2016.

Operating System and Application Upgrades Entry Criteria

City of Whitewater will implement the following prior to project kickoff:

1. Phase 1 of this project has been completed.
2. Unattended remote access to the relevant network, servers, and any other applicable devices has been provided by City of Whitewater to the Core BTS project team.
3. Unattended admin permissions to the relevant networks, servers, cloud tenants and resources, and any other relevant devices and services has been granted by City of Whitewater to the Core BTS project team.
4. Relevant technical schemas, documentation, and access to equipment necessary for this workstream have been gathered and provided by City of Whitewater to the Core BTS project team.

Operating System and Application Upgrades Assumptions

Assumptions made surrounding this workstream’s work efforts include:

1. Client has valid backups of all VMs
2. Downtime will be required for OS upgrade of the Virtual Machines and applications

Operating System and Application Upgrades Timeline

Phase 2: OS and Application Upgrades	W1	W2	W3	W4	W5	W6	W7
Discover and Plan							
Technical Oversight							
Review OS versions on each of the VMs that support an upgrade							
Create a schedule for the OS and SQL upgrades							
Objective: Create a schedule for OS and SQL upgrades							
Deliverable: Upgrade Schedule							
Build							
Technical Oversight							
Perform Windows Server OS Upgrades							
Deploy New SQL Server for Police Application Hosting							
Upgrade Existing Microsoft SQL Server with New OS and SQL Versions							
Objective: Upgrade as many of the VMs to the latest version of Windows Server OS							
Deliverable: Updated Architecture Plan Document							
Stabilize							
Technical Oversight							
Test Connectivity of upgraded Windows Servers							
Test End User Connectivity for Upgraded SQL Servers							
Objective: Servers capable of an OS upgrade are complete, SQL has been upgraded							
Deliverable: Updated Architecture Plan Document							
Deploy							
Technical Oversight							
Perform Knowledge Transfer with Whitewater IT Staff							
Finalize the Architecture Plan Document							
Deliverable: Final version of Architecture Plan Document							
Conduct a completion meeting							

Project Assumptions and Out of Scope

General Assumptions

The project timeline, resource plan, and pricing are based on required access for Core BTS resources and a continuous work effort from project kickoff to completion. Unexpected project delays that may be caused by hardware availability, availability of City of Whitewater resources, missing of agreed deadlines by City of Whitewater resources, documented assumptions found to be incorrect, or changes to an approved design may require a Project Change Request ("PCR") to realign the scope and / or adjust the price of the project, which may also result in a project pause.

Project assumptions include, but are not limited to, the following statements for this project:

1. Work could include on-site and off-site activity by Core BTS resources to ensure project tasks are completed in a timely manner.
2. Normal business hours are 8 AM to 5 PM Central time zone Monday through Friday, excluding Core BTS observed holidays and local national holidays for Global Delivery team members. Global Delivery resources assigned for this engagement will typically operate Monday through Friday during standard UK working hours, providing some overlap with Eastern USA time zone. Special events (e.g., City of Whitewater cutover timeframes) may require resources to work outside their regular working hours during other days and times.
3. Requirements / discovery sessions may include discussion about out-of-scope topics to ensure current work or solutions will not inadvertently impact business operations or systems. Only technologies and / or solutions with defined deliverables within this SOW are considered in scope.
4. During the Discover and Plan phase, Core BTS consultants will align project requirements against released and preview technologies from Microsoft and design the solution toward those technologies. If Microsoft updates the technology after the completion of the Discover and Plan phase, Core BTS consultants may review the updates and discuss potential benefits and impacts to the solution.

Project Completion

Core BTS will have fulfilled its obligations for the Services described in this SOW when any one of the following first occurs:

- Core BTS completes the scope as described in this SOW, including all defined outcomes and deliverables
- Services are terminated in accordance with the provisions of the Terms and Conditions section

Out of Scope

All work that is "out of scope" will be addressed by Core BTS and the City of Whitewater Project Sponsor to clarify the issue and negotiate feasibility, impact, and cost. Should "out of scope" work be identified, formal written approval via a PCR from City of Whitewater is required prior to commencing any such work.

Deficiencies of any kind within the current environment discovered because of the project will not be remedied within the scope of this project. Quick win action items will be identified, if possible.

This project will focus on the scope as noted above. All other areas are not within the scope of this project. These include, but are not limited to:

- Upgrade of operating system on servers that contain applications that are not compatible with Windows Server 2022
- Upgrade of SQL Server with databases that do not support SQL Server 2016 or later
- Deployment of new windows server and migration of applications if an in-place upgrade of the operating system cannot be performed
- Ongoing deployments of any technology beyond the final week of the engagement
- Remediation or roadmaps of existing infrastructure for subsequent strategic initiatives
- Support or remediation services for technologies not implemented by Core BTS as part of this engagement
- Support or remediation services for applications or operating system versions that are not actively supported by the vendor
- Development or delivery of any formal training not listed as specifically in scope

Responsibilities of City of Whitewater

Core BTS's approach and estimate are based upon the following responsibilities and assumptions. Changes to these responsibilities and assumptions may require changes to Core BTS's approach, scope and / or estimate. Core BTS project management will notify City of Whitewater as soon as they are aware of any changes to these responsibilities and assumptions, including potential implications. City of Whitewater is responsible to:

- Designate City of Whitewater project sponsor, who will provide overall project direction, guidance, and high-level scope boundaries, as well as attend project kickoff and management checkpoint meetings
- Designate City of Whitewater primary contact, who will manage City of Whitewater project team members and resources, including any client tasks as outlined in the project schedule
- Ensure project team members and other knowledgeable resources are readily available to meet the project timeline
- Coordinate with assigned Core BTS project lead to schedule Discovery Sessions, as required, to occur during the first week of the project
- Provide appropriate accounts and access for all resources prior to the start date of each workstream Discover and Plan phase, per the project schedule
- Provide sufficient licensing and / or subscription(s) prior to each phase, including Core BTS resources
- Procure, install, host, test, deploy, monitor, and maintain all associated hardware and third-party software, including patches or upgrades as required
- Any third-party support costs, which include but are not limited to Microsoft tickets, contracts, or other means of support will be the financial responsibility of City of Whitewater
- Communicate the project plan and all timelines and goals to City of Whitewater business units or facilities, as appropriate
- Submit change controls for all environments, as necessary, with enough lead time to meet the project timeline
- Ensure attendance to status calls and provide decision management for the duration of the engagement
- Provide project team members and other resources that are necessary to adhere to the project timeline

- Participate in governance and operations workshops
- Participate in meetings to define strategy and architecture
- Participate in the design sessions
- Provide resources knowledgeable in current environment as necessary
- Define and validate business and technical requirements, including license and hardware requirements
- Ensure timely response to functional and technical considerations
- Validate functionality and user experience meet expectations
- Provide consolidated feedback to the deliverables in the timeframe as defined below
- Participate in project status and closeout meetings
- Provide all Tier 1 and Tier 2 support to end-users
- Deliverables will be deemed accepted upon receipt of email confirmation from the City of Whitewater Program Manager or after five (5) business days from the request

Project Investment

Investment Summary

Component	Pricing
Delivery Services	\$99,840
Total Price	\$99,840

Invoice Schedule

Invoice #	Invoice Milestone	Invoice Amount
1	Upon acceptance of proposal	\$33,000
2	Upon completion of Deploy phase of Phase 1: Infrastructure Refresh Workstream	\$33,000
5	Upon completion of Deploy phase of Phase 2: OS and Application Upgrades	\$33,840
Total to be Invoiced		\$99,840

Pricing and Minimums

- Pricing is for work performed during normal business hours (Monday – Friday, 8 AM – 5 PM Central time zone, excluding holidays).
- Pricing is based on a continuous work effort for each role per the plan outlined in this SOW. To maintain resource continuity and a consistent level of progress, dedicated resources will be assigned. Most roles are full-time, unless otherwise noted within the project timeline. Deviations from this schedule may result in a PCR.
- City of Whitewater will be invoiced upon completion of milestones as detailed in the Invoice Schedule.
- Pricing is for Core BTS professional services only, and does not include Cloud hosting, software licensing, or other fees. Core BTS assumes no responsibility for the monitoring or optimization of Client spending on IaaS (Infrastructure as a Service) and PaaS (Platform as a Service) unless explicitly detailed and agreed upon in this

Statement of Work. Any tasks or services beyond the defined scope related to monitoring or optimizing Client costs on IaaS and PaaS may require a PCR.

Travel and Expenses

Travel time and expenses are not included in the estimate provided above. Travel expenses will be billed to City of Whitewater on a pass-through basis and may include:

- Mileage and parking – at cost
- Meals – at cost
- Lodging – at cost

Such travel expenses shall adhere to the mutually agreed upon City of Whitewater and Core BTS Travel and Expense (“T&E”) policies during the project. Any expenses to be paid by City of Whitewater shall be duly documented with the corresponding invoices.

Organizational Experience

Company History

Core BTS' story is one of convergence – bringing together the right people and organizations to build a leading provider of business technology solutions. Cti, the predecessor organization, was established in 2004 to acquire and build a leading voice and data services integration company. Securing an equity commitment from Founders Equity in 2004-2005, CTi acquired three companies who were already providing voice and data services and products to expanding markets in the Northeast:

- Open Systems Technologies LLC (Clifton Park, NY), founded in 1991
- WorldNet Technology Consultants, Inc. (Reading, PA), providing expansion into Pennsylvania
- AAA Networks (Falls Church, VA), founded in 1992, providing voice and data services in the Washington, DC, area

Then CTi acquired Core Business Technology Solutions, LLC, a business technology consulting and integration company headquartered in Indianapolis, IN, with offices in Exton, PA, Reston, VA, and Nashville, TN. The merged companies consolidated under the Core identity, incorporating Core's business practices and back-office operations.

In July 2009, Core BTS announced the acquisition of Inacom Information Systems, an award-winning integrated solutions provider and technical training powerhouse. With this acquisition in Wisconsin, Core BTS was able to expand its footprint and business impact across a number of solution offerings. In the fall of 2012, Core also acquired the Cisco sales and support team from another value-added reseller in New Jersey, and so now has an office in that state.

In September 2018, Tailwind Capital, a middle market private equity firm investing in growth-oriented companies within business services, healthcare and industrial services, announced its acquisition of Core BTS.

On March 1st of 2019, Core announced the acquisition of the Microsoft business unit of SADA Systems, and so Core now has an office in the Los Angeles, CA area. Then in August of 2020, Core acquired Blue Chip Consulting Group, a leading Microsoft Consulting Services provider, based in Cleveland OH. In the first half of 2021 Core also acquired Skyline Technologies, a nationally known developer of customized Microsoft applications, based in Green Bay, WI, and Aptera, a leading IT consultancy group based in Fort Wayne, IN.

Finally, in December of 2021, Core BTS, Inc. was acquired by Nomura Research Institute Holdings America, Inc. (NRI-HA).

1. Identify contact name(s) and information for questions concerning information presented in the RFI Response.

Core BTS Response:

**Lisa Bowers, Account Executive, SLED
608-212-7702
lisa.bowers@corebts.com**

2. List any relevant websites for your company and its offerings.

Core BTS Response:

[Core BTS | Digital Transformation Consultancy](#)

[Education Technology Consultant Services | Core BTS](#)

[CoreAir](#)

3. Describe your services strategies, including markets served. Include information regarding any strategic partnerships or alliances with other technology or service vendors.

Core BTS Response:

Company Overview

Core BTS, Inc. ("Core BTS") is an award-winning corporate and public sector solution provider focused on customer-centric software, cloud technology, and IT infrastructure. Core BTS solves complex business needs across networking, collaboration, security, data center and cloud infrastructure. Our capabilities include technical support and managed services of existing infrastructure, security and networking advisory and assessments and remote monitoring support for hardware and software technologies. The Core BTS team has more than 15 years of experience and holds multiple top-level certifications and partnerships with IT industry leading companies, allowing us to provide customers with expertise across multiple technologies.

Core BTS currently has 14 offices in nine states, with more than 650 employees and over 1,500 active customers across industries including healthcare, education, state and local government, healthcare, financial services, hospitality, and manufacturing.

We work closely with our customers to understand their strategic direction and organization. Our team of consultants, solution architects, and engineers work collaboratively with you from understanding your organization's objectives through implementation and operation.

Solutions

- **Secure Remote Work - Windows Virtual Desktop, Virtual Meetings & Calling, Power Apps**
- **Collaboration & Productivity - Business Transformation, Enhanced Collaboration, Business Process Automation**
- **Cloud Deployment & Optimization - Strategy & Planning, Migration & Management**
- **Networking & Datacenter Modernization - SD-WAN, Virtualization, Backup & DR, Secure Perimeter**
- **Data & Analytics - Data Transformation & Modeling, Predictive Analytics, BI Solutions**
- **Identity & Cybersecurity - Identity & Access Management, Security Assessments, Endpoint Management, Pen Testing, Governance & Compliance**
- **Managed Services - Cloud & On-Premises, Proactive Monitoring, Management & Optimization**
- **Application Modernization - Web Apps, Mobile Apps, API Development & Integration**
- **Adoption & Change Management - Engagement Management, Change Management, Adoption Management**

Benefits

- **Accelerate time to value**
- **Gain cost predictability**
- **Maximize your return on investment**
- **Increase organizational efficiency**
- **Secure apps, data, devices, and endpoints**
- **Help end users embrace technical change**

Differentiators

Core recognizes and respects the current level of competition in the industry. This recognition along with our enthusiastic corporate culture inspires us to continually improve and be the best at delivering service excellence. We know we are not your only choice, but we are the first choice for thousands of organizations around the country because we offer you these differentiators that set us apart.

EXPERIENCE

Our engineers have logged millions of hours on various projects, and each member of our executive team has their roots in technology. We know this business inside and out and bring our expertise to every meeting with you.

CUSTOMER SERVICE

Second to none: you have a deadline to beat, budget to meet, and expectations to exceed. Every single employee at Core strives to make this happen, day in and day out. That means that every order is double-checked for accuracy, every invoice is clear and detailed, and every phone call and meeting addresses your concerns.

SOLUTIONS PORTFOLIO

Whether it is a large, multi-faceted project or a number of different projects at different times, you can take comfort in the familiarity and trust that a single solution provider can bring. Core's expansive solutions portfolio means we can handle just about any project, regardless of size, providing you the familiarity and service only a consistent team can bring.

SUPPORT

With Core there is a beginning but there is no end. Not only do you get the personal support you expect during a project engagement, but also can explore the options of customized 24x7x365 managed services support.

PROGRAM AND PROJECT MANAGEMENT

Core combines the people, processes and services that surround any IT experience. Through Core's proven engagement methodology method, you can maximize every dollar and make your IT investments more effective.

We provide *technology-neutral assessments* of your business to understand how end-users work with technology and how you would like technology to work for them. We employ I.T. Information Library (ITIL) best practices for IT management and best-in-class Project and Program Management. This unique, *all-encompassing methodology* provides true ongoing support and ROI realization throughout the life of the project. Many solution providers employ a lifecycle management approach, but none are as comprehensive or successful as the one-of-a-kind model that Core has built. *Core's delivery model ensures maximum efficiency, communication and ROI for each and every project.* Every project Core delivers is internally reviewed for excellence at the critical stages of delivery. The talent of the Core team gives customers the confidence and knowledge that their project will be done correctly and bring added-value to their organizations.

Key Partnerships

Cisco

Core BTS ranks as one of the top 35 Cisco Channel Partners in the US. As a Cisco Gold Certified Partner since 2005, we have a deep understanding of the Cisco product lifecycle and how these products can be properly deployed and integrated for use as a platform for enterprise-wide solutions. This experience enables us to provide you with the expert design, implementation, and support services needed to successfully maximize your IT investment – from initial product procurement to end-user training and adoption.

Once again in 2023, Core BTS re-sold more than \$100M in Cisco products to 500+ active accounts, and also delivered more than \$25M in professional design, implementation, support and managed services to those same clients, in conjunction with these product sales. Providing value added collaboration, enterprise networking, and security solutions to our clients has been, and continues to be, a key focus area for Core. The exceptional depth and breadth of Core's expertise and knowledge of Cisco products and services is clearly indicated by the number of solution Specializations Core holds as a company as well as the many individual technical certifications held by our engineers.

Company certifications.

- **Gold Integrator**
- **Gold Provider**
- **Master Data Center and Hybrid Cloud Specialization**
- **Master Collaboration Specialization**
- **Master Enterprise Networking Specialization**
- **Advanced Data Center Architecture Specialization**
- **Advanced Security Architecture Specialization**
- **Advanced Collaboration Architecture Specialization**
- **Advanced Enterprise Networks Architecture Specialization**
- **Customer Experience Specialization**
- **Collaboration SaaS Specialization**
- **Webex Contact Center Specialization**
- **Hyperflex Specialization**
- **IoT Specialization**
- **Full-Stack Observability Specialization**
- **Cisco Unified Contact Center Express Specialization**
- **Environmental Sustainability Specialization**
- **Managed Business Communications, Managed Firewall, Meraki Access**

Microsoft

As a Microsoft Solutions Partner and **Azure Expert MSP**, Core BTS is one of the top Microsoft partners in the United States. Our strong Modern Work and Azure capabilities mean we can confidently deliver across the Microsoft Cloud. Coupled with our Direct CSP status, we can skillfully maximize your Microsoft investment and deliver outcomes that accelerate digital transformation.

Key Microsoft Solution Offerings

- **Digital & App Innovation**
- **Cloud Native Apps, Power Apps, DevOps, Industry-Specific Bots**
- **Employee Experience**
- **Teams Platform, Viva, Adoption & Change Management**
- **Migrate & Modernize with Azure**
- **Infrastructure and Workload Migrations, SQL Server on Azure, SAP on Azure**
- **Digital Workforce**
- **M365 Deployments, Secure Remote Work, NextGen Windows Experience**
- **Data & Analytics**
- **Data Foundation, Power Platform, AI & ML**
- **Identity & Governance**
- **Security Assessments, Endpoint Management, Governance & Compliance**

Microsoft Solutions Partner Designations

- **Solutions Partner for Infrastructure (Azure)**
- **Solutions Partner for Data & AI (Azure)**
- **Solutions Partner for Digital & App Innovation (Azure)**
- **Solutions Partner for Modern Work**

Cloud Partner Program Memberships

- **Azure Data Avengers**
- **CIE Certified**
- **Direct Cloud Solution Provider**
- **National Local Services Provider**
- **DCO Program Participant**
- **FastTrack Ready**
- **Hybrid Cloud Foundation Top 10**
- **Microsoft Supplier Program (V-)**
- **Security and Manageability Elite Partner Program**
- **Solution Assessment Program**
- **Project Tandem Partner**

Microsoft 365 Copilot Partner (AI) offering the following services.

- **Microsoft 365 Copilot Workshop, Readiness Assessment**
- **Microsoft 365 Copilot-in-a-Week Engagement**
- **6-Week Microsoft 365 Copilot Deployment Implementation Engagement**

NetApp.

Core BTS has been a NetApp Preferred Partner for many years, with a primary focus on the public sector vertical market, i.e. State and Local Government, and Education (K-12, and Colleges and Universities). In 2023 Core's NetApp business grew by more than 300%, to more than \$10M.

Certifications

Hybrid Multicloud Flexpod Converged Infrastructure with Cisco
Hybrid Multicloud Storage as a Service with Netapp Keystone
Cisco and NetApp FlexPod Design Specialist
Selling NetApp Keystone as a Service
Hybrid Cloud Associate
Flexpod Sales

Other Partnerships

Adobe – Registered Partner.
Arctic Wolf – Gold Pack.
Citrix – Platinum.
Cohesity – Preferred.
Dell – Gold Solution Provider.
Google – Cloud Partner.
HP – Business Partner.
Lenovo - Authorized Reseller, Infrastructure Solutions, Intelligent Devices.
Palo Alto – Registered.
Pure Storage – Elite.
Varonis – Silver.
Veeam – Silver.
VMware – Select.

Previous Work

University of Wisconsin – Whitewater, 800 W Main St, Whitewater, WI 53190
Joe Uselding useldinj@uww.edu 262-472-7778
FAS8300 and A400

Hamilton College, 198 College Hill Rd, Clinton NY 13323
Jesse Thomas jthomas@hamilton.edu 315 723 3372
Flexpod based on NetApp A150

Albany County, 112 State Street, Albany NY 12207
David Berkun david.berkun@albanycountyny.com 518447 7283
NetApp C250

SUNY Albany, 1400 Washington Ave, Albany, NY 12222
Eric Dombrowski, edombrowski@albany.edu 518 322 9411
NetApp A900's

Technical Expertise and Experience

SOLUTION ARCHITECT

SUMMARY

This individual is in the Presales practice at Core BTS. He has over ten (10) years of experience in the information technology industry and has played key roles in numerous Route/Switch, Wireless, Datacenter and Security projects. His core skills include Network Routing and Switching. He has significant experience in providing consultation, design, and implementation of Cisco network infrastructure solutions employing the Catalyst and Nexus product lines.

SKILLS

- Routing and Switching
- Wireless Networks
- Python
- Firewalls
- Automation
- Data Preparation and Cleaning
- Machine Learning
- Technical Project Management

CERTIFICATIONS

- Cisco Certified Network Professional Routing and Switching (CCNP Route/Switch)
- Cisco Certified Design Professional (CCDP)

EXPERIENCE

Network Deployment | Major Semiconductor Manufacturer

Assisted in the design and deployment of a highly redundant and fault-tolerant core switching and routing infrastructure. Worked with logistics to deliver and stage large quantities of equipment. Interfaced with the client to determine schedule and to ensure key project objectives were met.

Infrastructure Refresh | Large Medical Practice

Designed, implemented, and integrated a complete infrastructure refresh. The design included new routing and switching, security, wireless and hyperconverged datacenter components. Fully integrated each product to create a manageable, performant and stable solution. Ensured business continuity by developing and implementing a disaster recovery plan.

Discovery, Inventory and Planning | A National Legal Arbitration Group

Inventoried and analyzed, then developed a long-term IT infrastructure strategy, including equipment lifecycle and software maintenance. Developed a wireless networking strategy for use in a dense, urban environment.

PRINCIPAL ARCHITECT

SUMMARY

This individual is in the Hybrid Infrastructure practice at Core BTS. He strives for excellence in the delivery of complex solutions, leading to successful implementations and migrations. He specializes in architectural design and implementations of virtualization technologies, Azure IaaS, Azure DaaS, Azure PaaS, Microsoft 365, Microsoft active directory, Citrix, and NetScaler technologies using various mainstream technologies. He has over twenty-nine (29) years of experience in the information technology industry and has played key roles in several Virtual Desktop Infrastructure, Datacenter migrations, Cloud migrations, Acquisition & Divestiture migration projects.

SKILLS

- Enterprise virtualization architecture and deployment
- Enterprise cloud architecture and implementation
- Enterprise monitoring and management
- Enterprise Acquisition/Divestiture migrations
- Hybrid Datacenter Migrations
- Implement and manage Azure storage
- Deploy and manage Azure compute resources
- Enterprise domain migration
- Design/Implementation of Azure Files
- Implementation of Azure ARC
- Monitor and maintain Azure resources
- Results oriented consulting professional
- Strategic technology planning
- Azure Virtual Desktop
- Citrix Virtual Apps and Desktops
- Citrix NetScaler
- Active Directory, Azure AD, Azure ADDS
- Windows Server Infrastructure (NT through 2022)
- Microsoft Exchange Infrastructure (5.5 through 2019, and Microsoft 365)
- Microsoft SQL Server Clusters (2008 through 2022)
- Excellent technical and process documentation skills
- Focus on mentoring and cross-training
-

CERTIFICATIONS

- MS: Azure Virtual Desktop Specialty
- MS: MCSE: Productivity
- MS: MCSE: Messaging
- MS: MCSA: Windows Server
- Citrix Certified Professional - Virtualization
- Citrix Certified Associate - Virtualization
- Citrix Certified Professional - Networking
- Nerdio – NME-200 Certified

EXPERIENCE

Active Directory Domain Consolidation | Hotel and Casino Entertainment

Architected the consolidation of seventeen (17) child domains into the root active directory domain. This client had created child active directory domains for each of their casino properties. A new software implementation determined that if all AD resources existed in a single domain, the software implementation would be easier to manage and maintain in the future. As part of the domain consolidation project Microsoft 365 was leveraged as the email platform for the client. As the objects in the child domain were collapsed into the root domain, the email resources from the child domain were migrated to Microsoft 365. I leveraged the use of Quest Migration Manager for AD, Microsoft Migration Toolkit, and Quest Migration Manager for Exchange to complete the migration successfully.

- Architected the process to migrate active directory and email resources from the child domain into the root domain and Microsoft 365.
- Worked with the client corporate IT department and the individual property IT departments to validate the migration procedure.
- Implemented Microsoft AD FS as the authentication for the Microsoft 365 environment as well as additional applications leveraging AD FS for authentication.
- Implemented Quest Migration Manager for AD, Quest Migration Manager for Exchange, and Microsoft Migration Toolkit as the platforms used to migrate resources from the child domain to the root domain.
- Managed two teams of Core BTS engineers that worked in parallel to migrate two properties simultaneously.
- Maintained a schedule of completing each child domain/property migration to 1 month for smaller properties and 6 weeks for larger properties.
- Managed and participated in server cut-over migrations, communication with software vendors, scheduling, and deployment to end users.

Property Migration due to Acquisition | Hotel and Casino Entertainment

A casino client purchased another casino entity which included 14 additional properties. Architected the migration of 14 properties into the primary casino client. The acquired company had 14 properties that needed to be added to the primary casino client's infrastructure. The resources included active directory, VMware, networking, servers, applications, Microsoft 365 email, SharePoint, and workstations. I leveraged the use of Quest Migration Manager for AD, Microsoft Migration Toolkit, and Quest Cloud Migrator for Email to complete the migration successfully.

- Architected the process to migrate active directory, VMware, servers, applications, and workstation into the root domain and Microsoft 365.
- Worked with the client corporate IT department and the individual property IT departments to validate the migration procedure.
- Worked with Core BTS and client project managers to devise a schedule to complete the migrations within 1 year timeframe. We created a process where I would arrive at the property, install the migration infrastructure, perform test migrations for server, application, email, and workstations over the course of 2 weeks, then the migration team would follow me at the property to perform the workstation and sever migrations over the course of four weeks, while I would move on to the next property and repeat the migration infrastructure

implementation. We were able to have two properties migrated simultaneously using this process.

- Engaged the Core BTS SharePoint migration team to coordinate and perform the SharePoint migrations as part of each property migration using the ShareGate migration tool.
- Integrated Microsoft AD FS as the authentication for the Microsoft 365 environment across both casino companies as the cross-company authentication platform during the migration.
- Implemented Quest Migration Manager for AD, Quest Cloud Migrator for Email, and Microsoft Migration Toolkit as the platforms used to migrate resources from the acquired casino properties.
- Managed two teams of Core BTS engineers that worked in parallel to migrate two properties simultaneously.
- Maintained a schedule of completing each property migration to 6 weeks for smaller properties and 8 weeks for larger properties.
- Managed and participated in server cut-over migrations, communication with software vendors, scheduling, and deployment to end users.

Azure Virtual Desktop Deployment | Healthcare Company

Architected the implementation of Azure Virtual Desktop (AVD) for a healthcare client. This client had attempted a proof of concept (POC) AVD deployment on their own. Core BTS was engaged to review the issues encountered with the POC environment and deploy an AVD environment for 500 users according to Microsoft best practices.

- Expanded the client's current Azure infrastructure to support a production deployment of AVD.
- Conducted interviews to gain user feedback regarding the POC deployment of AVD and issues encountered. I incorporated solutions for the reported issues into the production AVD Design.
- Worked with client extensively to identify the "use cases" that would be deployed to the AVD environment. We established 3 separate use cases, a testing methodology, and a deployment plan.
- Integrated Nerdio Manager for Enterprise as the management platform for AVD.
- Leveraged Nerdio to deploy the AVD components.
- Implemented the Nerdio scaling policies so the client could realize Azure cost savings as AVD was being deployed.
- Conducted User Acceptance Testing of the AVD deployment, remediated issues, and placed the AVD environment into production.

Microsoft Specialization Certification - Azure Virtual Desktop

Assumed the lead role in helping Core BTS achieve the Microsoft Specialty Certification for Azure Virtual Desktop. Gathered the required resources and documented the Core BTS method for implementing an Azure Virtual Desktop environment for a client according to Microsoft best practices.

- Created the documentation required for the AVD specialization certification.
- Gathered the evidence required by Microsoft for the specialization certification.
- Worked with the Core BTS team to review, edit, and finalize the documentation.
- Worked with the certification consultant to refine and revise the documentation.
- Successfully conducted the AVD specialization certification audit for Core BTS to achieve the AVD Specialization certification.

DIRECTOR, SECURE SOLUTIONS

SUMMARY

This individual works within the Architecture and Solutions Design practice at Core BTS. With over 16 years of experience working in the Information Technology sector, has he successfully designed and lead numerous business technology projects spanning Datacenter, Networking and Security practice areas. As a former IT Manager at a global biosciences firm, he brings forth expertise in driving business objectives with the use of technology, utilizing industry best practices and procedures surrounding ITIL and NIST Frameworks. He works closely with Core's clients to ensure projects meet or exceed requirements while providing best of class technical solutions that align with industry security standards.

SKILLS

- Cisco Networking
- Cisco Wireless
- Cisco UCS and Nexus
- Cisco Security Solutions
- VEEAM
- Commvault
- NetApp FlexPod
- VMWare ESXi
- VMware Horizon
- Enterprise Architecture
- Datacenter technologies
- NIST Cybersecurity Framework
- Business Continuity Planning
- Security Assessments
- Leadership in Information Technology
- Cloud Architectures

CERTIFICATIONS

- ITIL v3 Foundations
- Cisco Certified Network Administrator (CCNA)
- Leadership Columbia County

EXPERIENCE

Security consulting and architecture | Healthcare – Individual Hospital system

Architected improvement of numerous IT technologies areas to improve overall security posture in response to Hafnium vulnerability. Guided Healthcare client in identifying key areas needing security improvements, including but not limited to network segmentation, endpoint malware detection, firewall IPS/Anti-Malware, DNS security, Active Directory security, Multi-factor authentication. Worked with other Core BTS resources to assemble larger business plan to address other vulnerable areas and tackle staff skill shortages and resource constraints around security. Project status was reported weekly to the Board of Directors through the client IT Director as part of overall Healthcare improvement initiative enacted by the Board.

Security Incident Response | Healthcare - Level 1 Trauma Center

Lead Architect guiding a compromised Healthcare organization through an active Ransomware attack. Architected and guided a safe business recovery plan in conjunction with Core BTS engineers and program managers, reporting directly to the Healthcare client CIO and COO. Architected Business Continuity, Security and Network designs that encompassed EMR platforms (Meditech), Imaging systems (PACS), security toolsets, security teams, firewall systems, Datacenter, storage and WAN designs, Microsoft Cloud solutions and Citrix desktop architectures to safely recover systems. Communicated directly with the COO to provide status updates to the Board of Directors and advise on strategic investments to protect from future compromises.

Active/Active Datacenter | Healthcare – Healthcare Network

Lead Architect designing a new active-active datacenter for Healthcare network. Design encompassed a new datacenter location and encompassed all required power feeds, power backups, cooling systems, cabling, street access and physical load bearing to support a 75 rack datacenter. Assisted customer in managing project budget encompassing all aspects such as building contractors, carrier circuit installations, required power and cabling feeds, racks, storage systems, compute systems, networking equipment, replication technologies and staffing needs. The project resulted in a much more robust application platform, allowing the Healthcare network to grow through acquisitions and later support hosting of EMR services for other organizations.

Active-Active Datacenter and Virtual Desktop Infrastructure | Higher Education

Lead Architect designing a new active-active datacenter to support both Infrastructure and Virtual Desktops. Desktops supported remote students from overseas that accessed high-utilization applications such as AutoCAD. Datacenter and VDI were designed to be active-active with active failover between clusters in a NetApp MetroCluster design. The initiatives drove the College to be recognized by prospective students as a technology-first campus and supported increased enrollment in distance learning programs.

Expansion of Image storage | Outdoor adventures company

Provided a large storage design to support large image file repositories for an Outdoor adventures company. The organization was expanding their satellite image systems to provide customers with a more robust, higher resolution mapping solutions and needed to greatly expand their footprint. This storage solution provided a large scale-out repository to accommodate their rapid growth for the next 5 years.

Datacenter, Network and Security Architecture | Power Grid

Designed network and security Architecture for a Power Grid provider, following strict federal and state standards for security and network segmentation. Solutions ranged from Firewalls, to DNS security, URL Filtering, Datacenter network switching and IPS and Malware detection. These initiatives helped the Power Grid meet multiple security audits and assessments.

Budget Management | Multiple Clients

Assisted numerous clients in developing a rolling 5 year budget plan encompassing multiple facets of IT, from IT staffing, training, to hardware investments, managed services and cloud computing spend. Many of these engagements helped these clients to better allocate funds where needed while reducing spend in other areas, improving overall IT service to their respective organizations.

SOLUTION ARCHITECT

SUMMARY

This individual is in the Data Center practice at Core BTS. He has over twenty (20) years of experience in the information technology industry and has played key roles in several Server/Client Virtualization, Microsoft Server/Cloud Products, NetApp storage and Cisco UCS/HyperFlex projects. His core skills include enterprise design, implementation, management, maintenance, troubleshooting and disaster recovery. Timothy has significant experience delivering technological solutions utilizing VMware, Microsoft, NetApp and Cisco UCS/HyperFlex.

SKILLS

- Microsoft Windows Server/Client
- Microsoft Exchange 2003 - 2019
- Microsoft Office 365
- Microsoft SQL Server 2008 - 2017
- Microsoft System Center Endpoint Configuration Manager 2007 – Current Branch
- VMware vSphere
- VMware Horizon
- NetApp Storage System
- Cisco UCS/HyperFlex

CERTIFICATIONS

- Microsoft Certified Solutions Expert: Core Infrastructure
- Microsoft Certified Solutions Expert: Productivity Solutions Expert
- Microsoft Certified Solutions Associate: Windows Server 2012/2016
- VMware Certified Professional: Datacenter Virtualization 6/6.5/6.7
- VMware Certified Professional: Virtual Desktop 6/7
- VMware Certified Professional: Network Virtualization

EXPERIENCE

Virtual Desktop Infrastructure Solution Implementation | Higher Education

Designed and deployed a virtual desktop infrastructure solution using VMware Horizon employing hardware 3D acceleration as well as VMware App Volumes. Worked hand in hand with local staff to ensure proper functionality and nominal operation based on customer requirements.

Virtual Desktop Infrastructure Migration | Financial Sector

Planned and deployed parallel virtual desktop infrastructure solution to migrate users to newer incompatible version of VMware Horizon. This migration also consisted of new Cisco UCS server hardware as well as NetApp all flash backend storage.

Microsoft Exchange Migration to Office 365 | Education

Planned and implemented Microsoft Exchange migration from one of the largest school districts in the New York Capital District. Transitioned mail delivery to from on-premises Barracuda Email Gateway appliance to use Cisco Email Security. Delivery knowledge transfer to local staff on management and operation.

System Center Endpoint Configuration Manager Deployment | Education

Deployed and configured multiple Microsoft System Center Endpoint Configuration Manager instances for a multitude of school districts. Ranging from single server, single server deployments to entire hierarchies with multiple sites and remote distribution points using on-premises and Azure cloud technologies

Active Directory Migrations | Education and Not-For-Profit

Assessed, planned and performed many Active Directory migrations to newer versions of Windows Server operating systems from simple to complex Active Directory deployments.

NetApp Cloud Volumes OnTap Deployment| Banking

Designed and deployed solution for on-premises data replication to Microsoft Azure platform utilizing NetApp Cloud Volumes OnTap. Coordinated and worked with local staff and third party provider for internetworking needs to deliver a secure connection between on-premises and in-cloud storage.

Microsoft Exchange Recovery | Not-For-Profit

Assessed and implemented Exchange organization disaster recovery related to security incident response. Restored working environment containing multiple sites, servers and mailbox databases. Performed updating and security patching against all servers to prevent further exploit. Successfully transitioned client connectivity to newly built servers with no user interaction.

Active Directory Architect | Banking

Redesigned existing Active Directory site architecture for over 40 locations to incorporate Distributed File System presented shares closest to the clients operating location.

SENIOR ENGAGEMENT MANAGER

SUMMARY

This individual is in the Project Management practice at Core BTS. He has over twenty-five (25) years of experience in the information technology industry & has played key roles in many technical infrastructure, information security, & application development projects. His core skills encompass all facets of technical project management. Richard has significant experience managing & participating in projects across industry sectors, initially in controls engineering, moving to software development, which led into management of the full IT function within companies & latterly into a dedicated project management role.

SKILLS

- Project planning
- Resource management
- Task & issue management
- Customer relations
- Meeting facilitation
- Vendor relations

CERTIFICATIONS

- Project Management Professional (PMP) in good standing since July 2013

Experience - Enterprise Networking & Data Center

Cisco Firepower IPS Implementation | Airport

Configuration & deployment of threat protection services to client requirements.

AD/O365 Migration | Multiple Casinos

Migration of all personnel & workstations from on-premises AD & Exchange to Azure/O365.

Cisco UCS Implementation | Casino

Installation & configuration of Cisco UCS.

Cisco LAN Refresh | Financial Services Consultancy

Upgrade/replacement of Cisco core & edge switches to current generation.

Network Performance Analysis | Credit Union

Analysis & recommendations for remediation relative to networking issues reported by VPN & Citrix users.

VMware Upgrade Planning, Fiber Channel Switching Migration & Cisco UCS Implementation | Credit Union

Providing guidance on VMware upgrade & fiber channel switching migration activities. Cisco UCS implementation.

HPE Blade Update | Hospital

Installation & configuration of additional HPE server blades.

Pure Storage/Commvault Immutable Backup | Hospital

Replacement of legacy storage & backup systems with Pure Storage array & Commvault backup. Analysis & recommendations for backup to maximize protection against attack, in particular with regard to malicious encryption of data.

Cisco Prime Infrastructure Update | Consumer Electrical Manufacturer

Update existing Cisco Prime Infrastructure implementation to current stable release.

Cisco Router & Switch Refresh | Musical Instruments Manufacturer

Replacing routers, core & edge switches with current generation devices.

Cisco SD-WAN Deployment | Metals Manufacturer

Replace legacy MPLS circuits between offices with current generation Cisco SD-WAN system.

Citrix Infrastructure Review | Plastics Manufacturer

Review current Citrix configuration & provide recommendations for improvement.

Multi-Site "Mill-in-a-box" Implementation | Feedstock Manufacturer

Provision a single rack infrastructure based on Cisco Catalyst, Cisco Hyperflex & Veeam that can be replicated across multiple mills.

MDM Migration - MaaS360 to Microsoft Intune | Veterinary Supplies Manufacturer

Guide the migration of MDM services from legacy MaaS360 to Microsoft Intune.

Microsoft Intune PC Co-Management with SCCM | Veterinary Supplies Manufacturer

Lead development of a Microsoft Intune based PC & account provisioning solution.

Microsoft Teams Assessment & Workshops | Veterinary Supplies Manufacturer

Provide consultancy services to guide development of a Microsoft Teams based strategy for team member recognition.

Cisco Data Switch & Firewall Installation | Publisher

Cisco core & edge switch installation, comprising replacement of existing switches & addition of new capacity.

EXPERIENCE – SECURITY

Managed delivery services for over ninety security projects, for clients in the following industries: Building Supplies Manufacturer, County Government, Credit Union, Customer Engagement Consultancy, Environmental Consultancy, Eyecare Manufacturer, Financial Services Consultancy, Hospice, Hospital, IT Services Consultancy, Medical Manufacturer, Metals Manufacturer, Musical Instruments Manufacturer, Non-Profit Service Provider, Nursing Facilities, Payroll Services, Professional Association, School District, Senior Living Provider, Tax Advisory, Warehousing & Distribution. Projects comprise varying mixes of the following elements:

CIS Critical Security Controls Assessment

Risk assessment based on the CIS Critical Security Controls

HIPAA Risk Assessment

Risk assessment based on HIPAA requirements

NIST CSF Risk Assessment

Risk assessment based on the NIST Common Security Framework (CSF)

PCI Gap Assessment

Risk assessment based on the PCI DSS standards

Security Awareness Training

Security awareness training for all employees

Social Engineering (Phishing & Vishing)

Phishing and vishing campaigns designed to gather user credentials.

Web Application Security Assessment

Web application tests include a defined set of pages, fields, and user types.

Cybersecurity Threat Hunting

Targeted scan and analysis of IT assets for Indicators of Compromise (IOC).

Incident Response Readiness Assessment

Assessment of initial incident response readiness, including review of existing documents and procedures.

Incident Response Planning

Guidance in development of robust incident response plan.

Tabletop Exercise

Testing of incident response plan via guided tabletop exercise and resulting recommendations for updates to plans, procedures and documents.

Security Incident Response

Responding to organization-wide security incident, including isolation of assets, appropriate network segmentation, orderly cleansing and return to duty of assets and provision of forensic data as required.

Financial Stability

Core BTS Response: Now that Mutual Non Disclosure Agreement has been fully executed between the City of Whitewater and Core BTS, Inc., a Financial Overview statement may be sent to a small group of specifically designated individuals with the City. To initiate this process, please contact Lisa Bowers, Core BTS Account Executive, and she will make the necessary arrangements for the delivery of this information directly to those individuals.

Goods & Services Declaration

Submit this signed Declaration along with your response.

The vendor hereby declares understanding and agreement to provide the goods and services, at the prices quoted, in accordance with all terms and conditions, requirements, and specifications in this Request for Proposals, **taking into account the items noted as "exceptions" in the letter sent to the contact for this RFP on June 24, 2024.*** The Vender further agrees that upon receipt of an authorized purchase order from the City or when a Notice of Award is signed and issued by the City, a binding contract shall exist between the Vendor and the Districts. A signature is required below confirming understanding of this statement.

Doing Business as (DBA) Name: Core BTS, Inc.	Legal Name of Entity/Individual Filed with IRS for this TaxID No. Core BTS, Inc.
Mailing Address 5875 Castle Creek Parkway North Drive, #320	IRS Form 1099 Mailing Address 5875 Castle Creek Parkway North Drive, #320
City, State, Zip Code Indianapolis, IN 46250	City, State, Zip Code Indianapolis, IN 46250
Contact Person Lisa Bowers	Email Address lisa.bowers@corebts.com
Phone Number 608-212-7702	Fax Number 608-661-7701
Authorized Signature 	Date June 26, 2024
Printed Name John A. Cook	Title Director

***Copy of "exceptions" letter on the following pages for reference.**



June 25, 2024

Tim Nuebeck, IT Director
City of Whitewater
312 W. Whitewater St.,
Whitewater, WI 53190

Mr. Nuebeck,

As you know, the Core BTS team is now working on a response to the City's recently issued 2024 server RFP.

Per information on page 3 of the RFP, any exceptions that we want to note must be submitted on letterhead to you/the City of Whitewater team prior to the submission of our final bid response.

Accordingly, I am now sending this letter to set forth the following two exceptions for your review.

Current language in 2024 server RFP, on page 3

The City will select the lowest and best proposal that will fulfill requirements set forth by this RFP. Should the bidder take exception to any terms, conditions, or specifications stated herein, such exception must be so stated in writing on company letterhead and submitted prior to the RFP opening. Written exceptions may or may not be honored by the City. By quoting on this proposal, the vendor agrees to all contents of this RFP. Failure to deliver as guaranteed, or any other material breach or default by the awarded vendor, may result in the disqualification of the vendor from future RFP's. In the case of default by the awarded vendor, the City will procure from the second ranked vendor, and hold the first vendor responsible for any excess cost associated therein. Bidders will utilize the contact indicated in the RFP as the sole representative for ALL information regarding this RFP. Bidders who contact any other City employee or representative without the approval of the contact indicated in the RFP are subject to disqualification from this RFP.

Proposed exception to this section.

The City will select the lowest and best proposal that will fulfill requirements set forth by this RFP. Should the bidder take exception to any terms, conditions, or specifications stated herein, such exception must be so stated in writing on company letterhead and submitted prior to the RFP opening. Written exceptions may or may not be honored by the City. By quoting on this proposal, the vendor agrees to all contents of this RFP. Failure to deliver as guaranteed, or any other material breach or default by the awarded vendor, may result in the disqualification of the vendor from future RFP's. ~~In the case of default by the awarded vendor, the City will procure from the second ranked vendor, and hold the first vendor responsible for any excess cost associated therein.~~ Bidders will utilize the contact indicated in the RFP as the sole representative for ALL information regarding this RFP. Bidders who contact any other City employee or representative without the approval of the contact indicated in the RFP are subject to disqualification from this RFP.



Current language in 2024 server RFP, on page 8

The vendor hereby declares understanding and agreement to provide the goods and services, at the prices quoted, in accordance with all terms and conditions, requirements, and specifications in this Request for Proposals. The Vendor further agrees that upon receipt of an authorized purchase order from the City or when a Notice of Award is signed and issued by the City, a binding contract shall exist between the Vendor and the Districts. A signature is required below confirming understanding of this statement.

Proposed exception to this section.

The vendor hereby declares understanding and agreement to provide the goods and services, at the prices quoted, in accordance with all terms and conditions, requirements, and specifications in this Request for Proposals. The Vendor further agrees that upon receipt of ~~an authorized purchase order from the City or when a Notice of Award is signed and issued by the City, a binding contract shall exist between the Vendor and the Districts~~ the Vendor and the City will then negotiate a set of mutually agreed upon terms and conditions that will govern all future sales transactions and professional services engagements. A signature is required below confirming understanding of this statement.

Thanks for your consideration of these changes. I am looking forward to receiving your feedback on this information, and please know that the Core BTS team is certainly willing to discuss these items further.

If you do wish to schedule a call on this topic, please contact Lisa Bowers, Core BTS Account Executive, at 608-212-7702 or via email at lisa.bowers@corebts.com and she will make the scheduling arrangements.

Sincerely,

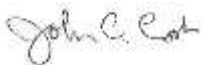
A handwritten signature in black ink that reads "John A. Cook".

John A. Cook, Director
Core BTS, Inc.

Felony Conviction Notification

The person or business entity entering into an agreement with this school district must give advance notice to the City if the person or an owner or operator of the business entity has been convicted of a felony. The notice must include a general description of the conduct resulting in the conviction of a felony. The City may terminate this agreement with a person or business entity if the City determines that the person or business entity failed to give notice by the next preceding subsection or misrepresent the conduct resulting in the conviction. The City will compensate the buyers or business entity for services performed before the termination of the agreement. By submitting this offer and signing this certificate, this bidder:

- Certifies that the owner/operator has not been convicted of a felony, except as indicated on a separate attachment to this offer.
- Certifies that no employee who will enter City buildings has been convicted of any felony or misdemeanor involving violence or sexual contact of sexual abuse. It shall be the duty of the vendor to conduct the appropriate background checks on its employees, and the vendor agrees to share this information with the City upon request.

Vendor Name	
Core BTS, Inc.	
Mailing Address	City, State, Zip Code
5875 Castle Creek Parkway North Drive, #320	Indianapolis, IN 46250
Telephone Number	Fax Number
1-855-267-3287	
Authorized Signature	Date
	June 26, 2024
Printed Name	Title
John A. Cook	Director

Terms and Conditions

1. **Payment Terms.** Payment is due within thirty (30) days of invoice date. After this time period, interest accrues at the lesser of the maximum rate permitted under applicable law or one and one-half percent (1.5%) per month from the date due until paid. We shall have a purchase money security interest in the products delivered by us to secure payment of the purchase price and any installation charges until they are paid in full by you. If invoice is not paid by you after 60 days, you authorize us to file all documents (including UCC financing statements) deemed necessary by us to protect and maintain our security interests.

2. **Independent Contractor; Taxes.** We will perform all services hereunder in our capacity as an independent contractor and not as an employee or agent of you. Our employees shall not be entitled to any privileges or benefits that you may provide to your employees, and we shall be responsible for payment of all unemployment, social security, federal income (state and local income where applicable) and other payroll taxes imposed by any governmental body on us in regard to our employees who are engaged in the performance of the services. Pricing set forth herein is exclusive of applicable sales, use and similar taxes assessed on the performance of any services. You agree to reimburse, indemnify and hold us harmless from and against any such tax, penalty and interest thereon levied against us for the provision of services to you hereunder.

3. **No Hiring.** For the term of the project and for a period of one year thereafter, you agree not to hire, solicit or accept solicitation of, through employment or otherwise, directly or indirectly, any of our employees or independent contractors with whom you have had any contact during the project, unless you obtain our prior written consent. Should you hire an employee or independent contractor of ours through employment or otherwise within this time period without our prior written consent, you will immediately pay as liquidated damages to us an amount equal to the relevant person's then current annual compensation (or the amount paid to or on behalf of the person in the last 12 months, in the case of an independent contractor).

4. **Warranty.**

A. We warrant and represent that the services will be performed in a skillful and workmanlike manner according to those standards generally prevailing among consultants performing similar services under similar circumstances. To the extent that we are not the manufacturer of any hardware or software products that you may purchase as a result of or relating to our Services, we do not provide any warranty on such products, whether with respect to their design, performance, functionality or compatibility with your existing system. Any warranty with respect to product must come from the manufacturer. Our product procurement distributor or we will pass through to you any applicable warranties of the manufacturer, to the extent permissible.

B. EXCEPT FOR THE EXPRESS WARRANTIES STATED IN THIS SECTION, WE DISCLAIM ALL WARRANTIES INCLUDING ALL IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE.

5. **Our Indemnity.** We will indemnify, defend and hold you harmless from and against any claims, liabilities, losses, expenses or damages (collectively, "Damages") caused by the services performed or the work delivered by us under these terms infringing any copyright, trade secret or any other proprietary right of any third party. Excluded from such indemnification are any claims related to (i) services performed on equipment or software which you covenanted that we had the rights to modify as set forth in Section 7 below, (ii) services performed to your specification or design and (iii) infringement resulting from or caused by your misuse or unauthorized modification of systems or product. We will also indemnify, defend and hold you harmless from and against any Damages resulting from our willful misconduct or negligent acts or omissions in performing the services which are the subject of these terms, except to the extent such Damages are caused by the willful misconduct or negligence of you, your employees or agents. Our obligation to indemnify and defend you with respect to any claim shall be subject to (i) your providing us with prompt notice of such claim, (ii) our having sole control over the defense and settlement thereof, (iii) your providing us with the information and assistance necessary to defend or settle such claim as reasonably requested by us, and (iv) the limitations on liability set forth in Section 6 below.

6. **Limitations of Liability. WE WILL NOT BE LIABLE FOR INCIDENTAL, SPECIAL, PUNITIVE, INDIRECT OR CONSEQUENTIAL DAMAGES, INCLUDING FOR LOSS OF DATA OR ITS USE OR LOST PROFITS OR OTHER ECONOMIC DAMAGES, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.** With the exception of indemnification for intellectual property infringement, your right to recover Damages from us in aggregate of all claims is limited to the amounts paid to us by you in the preceding twelve (12) months. You acknowledge that this limitation of liability is part of the consideration and was considered by us in establishing the prices and rates to be charged to you, which, but for this limitation, would have been higher.

7. **Your Covenants.** You covenant that: (i) you have the authority to agree to these terms and the funding necessary to pay for the requested services; (ii) you have title to or license or rights to use or modify any software or products which you have requested us to modify as part of such services; and (iii) you will provide us necessary access to your personnel, appropriate documentation and records and facilities in order for us to timely perform such services.

8. **Requests for Changes.** No change in the services provided hereunder will be performed until we receive a properly issued and executed Change Order; provided, however, that nothing herein will relieve you of the obligation to pay us for services rendered which were requested by you but are not documented in such a properly issued and executed Change Order or within the applicable scope of work.

9. **Confidentiality.** Each party acknowledges that it and its employees or agents may, in the course of the project, be exposed to or acquire information that is proprietary or confidential to the other party. Each party agrees to hold such information in strict confidence and not to discuss or disclose any such information to any third party for a period of three years. The parties acknowledge that the provisions of this paragraph shall not apply to: (a) information which at the time of disclosure is, or without fault of the recipient becomes, generally available; (b) information which either party can show was in its possession at the time of disclosure or was independently developed by it; (c) information received from a third party which had the right to transmit same without violation of any secrecy agreement with the other party; and (d) information which is required to be disclosed pursuant to court order or by law.

10. **Termination of Agreement.** Either party may terminate our engagement at any time upon 30 days prior written notice to the other. **Unless otherwise expressly stated in the body of this Agreement or related order(s), termination for convenience or default by Customer of any (i) licensing or subscriptions, (ii) products ordered from Core that Core cannot cancel with Core's vendors, or (iii) services with a fixed term, shall incur a termination fee equal to 100% of the unpaid price of the product and/or the unpaid remainder of the term, payable to Core in full upon the effective termination date.** In the event of termination for convenience or default by Customer for products or services not subject to the preceding paragraph, Customer shall within thirty (30) days of the date of termination pay Core all amounts owed for Products and Services provided by Core during the Term of this Agreement up to and including the date of termination.

11. **Entire Agreement; Amendment.** These terms and the accompanying engagement letter sets forth the entire understanding of the parties with respect to the subject matter hereof and is binding upon both parties in accordance with its terms and may be amended only by an entry signed by both parties. There are no understandings, representations or agreements other than those set forth herein.

12. **Assignment.** You may not assign any of the rights or obligations hereunder without the prior written consent of Core.

13. **Notices.** Any notice or communication from one party to the other concerning the terms hereof shall be in writing and shall be sent by certified mail, return receipt requested and postage prepaid or by commercial overnight mail to the most recent address that either party has specified in writing to the other.

14. **Governing Law.** These terms shall be governed by and construed in accordance with the laws of the State of Delaware.

15. **Force Majeure.** Neither party shall be liable to the other for any failures or delays arising out of conditions beyond its reasonable control, including, without limitation, work stoppages, fire, civil disobedience, delays associated with product malfunction or availability, riots, rebellions, storms, electrical failures, delays caused by the other party, and acts of God and similar occurrences.

16. **Waiver; Severability.** Any waiver of any right or default shall be effective only in the instance given and if in writing and signed by the party against whom it is sought to be enforced and shall not operate as or imply a waiver of a similar right or default on any other occasion. If any term or provision hereof should be declared invalid by a court of competent jurisdiction, the remaining terms and provisions hereof shall be unimpaired, and the invalid terms or provisions shall be replaced by such valid terms and provisions as come closest to the intention underlying the invalid term or provision.