

THE POWER OF EXPERT IT



***RFP Response:  
IT Analysis and Support Services***



**April 30th, 2013**

***Designed By:  
Polar Systems, Inc.***



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**April 30, 2013**



Mr. David Knoll, IT Supervisor  
City of Oregon City – Information Technology  
625 Center Street,  
Oregon City, OR. 97045  
(503) 657-0891

**RE: Request for Proposal – IT Analysis and Support Services**

Dear Mr. Knoll,

Thank you for the opportunity to respond to the RFP for the City of Oregon City.

Polar Systems has provided computer network solutions for thirty-two years. We take pride in having one of the largest install bases of local and wide area networks in Oregon and SW Washington. Our client list includes many of the best-known not-for-profit, and for-profit organizations in the area. Polar Systems is a charter member of the Microsoft Certified Partner program and we are a Silver Server Platform specialist. In 2012, we once again earned a listing on MSPmentor's list of the world's most progressive managed service providers.

Polar Systems provides executive-level IT management consulting and support services. Our highly skilled team of Senior Engineers and Business IT Consultants provides expertise in developing business process, selecting and integrating software solutions, designing and programming software applications, managing new system rollouts, data conversion, disaster recovery, project management, and training. All of our senior staff have more than five years' experience, and many bring more than fifteen years of experience.

Please do not hesitate to call me or any other members of my Team, if you require additional materials or clarification on any of the information that we have provided

Best Regards,

Timothy Tragesser  
President  
Phone: 503.775.4410 ext. 106  
FAX: 503-775.2664  
Email: [ttragesser@polarsystems.com](mailto:ttragesser@polarsystems.com)

21890 Willamette Drive  
West Linn, OR. 97068

## 1. Statement of Bid Price

The included bids are based upon the information provided in “Section 2: Background,” and are subject to change based on the findings in the IT Assessment. The bids shall remain valid for ninety (90) days following the proposal due date.

## 2. Statement of Firm Experience, Qualifications & Staffing

Since 1981 Polar Systems has served the SMB and non-profit/local government community of Oregon and Washington. An example of this is Cowlitz Family Healthcare Center, a Non-Profit in Longview, WA. CFHC had 125 users when they first engaged with Polar Systems in 2008 for a site assessment, network re-design and virtualization project. Today, Polar is relied on to support 225 users and the IT systems and infrastructure they count on to be highly available and well performing.

**Table 1: FTEs by Position**

Position	Number of Employees (FTES)
Executive Management	2
Business Development	5
Technical Service & Support	16
Administration	1
<b>Total</b>	<b>24</b>

### Project Personnel – Names, Contact Info

Executive Contract Administrator:

Name: Tim Tragesser - President  
 Address: 21890 Willamette Drive  
 West Linn, OR 97068  
 Contact: 503-775-4410 ext. 106, Email: [TTragesser@polarsystems.com](mailto:TTragesser@polarsystems.com)

BS – Finance CCSA – 15 years IT Experience

As the president of Polar Systems, Tim works to align innovation and technology with the business needs of more than 200 customers and partners. With a background in corporate finance, Tim brings 15+ years of experience consulting on IT solutions. In the rapidly changing technical landscape, Tim is committed to providing world class thought leadership to enable our clients to maintain a competitive advantage.

vCIO Contract Administrator:

Name: Shane Boyle, vCIO  
 Address: 21890 Willamette Drive  
 West Linn, OR 97068  
 Contact: 503-775-4410 ext. 140, Email: [Sboyle@polarsystems.com](mailto:Sboyle@polarsystems.com)

BA – Physics, MBA, ITIL, MCSE, A+ - 15 years IT Experience

Tactically-minded, Sr Manager with experience driving IT solutions to meet local government and corporate needs. A passionate problem solver with an understanding of operations and the ability to execute ‘big picture’ vision. Committed to delivering outstanding customer service and determining the steps to find the right solutions to complex technology problems.

Professional Services Contract Administrator:

Name: Kenny Franklin, Professional Services Manager  
 Address: 21890 Willamette Drive  
 West Linn, OR 97068  
 Contact: 503-775-4410 ext. 123, Email: [Kfranklin@polarsystems.com](mailto:Kfranklin@polarsystems.com)

BS – Business Administration, MCSA, CNE, CCA, VCP – 17 years IT Experience

Experienced Professional manager, network administrator, consultant, and project manager, experienced installing, supporting, and project managing systems. Expert in network change management with a focus on value delivery utilizing Windows, Messaging, Virtualization, Citrix, storage area networks (SAN), networking and security.

Name: Jason Wrede  
 Address: 21890 Willamette Drive  
 West Linn, OR 97068  
 Contact: 503-775-4410, Email: [jwrede@polarsystems.com](mailto:jwrede@polarsystems.com)

BA – Political Science, MCSE, A+, Linux+, Network+

A Sr Systems Engineer delivering the right technologies to fulfill the business need. Experienced in design and execution of a range of technology including messaging, big data storage, virtualized client/server models, high availability application delivery and network security platforms.

Name: Mark Filipovich  
 Address: 21890 Willamette Drive  
 West Linn, OR. 97068  
 Contact: 503-775-4410 ext. 125, Email: [mfilipovich@polarsystems.com](mailto:mfilipovich@polarsystems.com)

BS – Public Relations, U of O School of Journalism

A Sr. IT Sales Executive with 11 years of experience selling IT solutions and services. A dedicated customer advocate, with a passion for working with IT teams to identify the right technical solutions to solve business and IT challenges

## 4. Customer References:

- 1) Cowlitz Family Healthcare Center  
 Dian Cooper, CEO. Phone: 360-636-3892. Email: [dcooper@cfamhc.org](mailto:dcooper@cfamhc.org)  
 1057 12<sup>th</sup> Ave, Longview, WA. 98632  
**Services Provided** - project-based consulting and ongoing Managed IT Services since 2008 to approximately 250 users.  
 Projects included IT Network Assessment, Network re-architecture, virtualizing the IT environment.
- 2) City of West Linn  
 Kirsten Wyatt, Assistant City Manager. Phone: 503-722-3428. Email: [Kwyatt@westlinnoregon.gov](mailto:Kwyatt@westlinnoregon.gov)  
 22500 Salamo Road #600. West Linn, OR. 97068  
**Services Provided** - vCIO and project-based consulting since August 2012 to 140 users.  
 Projects include: Virtualization Stress Testing, VDI, Budget development, Infrastructure Strategy Planning
- 3) Oregon City Police Department  
 Lt. Bill Kler. Phone: (503) 657-4964. Email: [bkler@orcify.org](mailto:bkler@orcify.org)  
 325 Warner Milne Rd, Oregon City, OR. 97045  
**Services Provided** - Project-Manager/vCIO services, and a Police Dept-specific IT Assessment since 2013 to 45 users

## 5. Summary of Support Services & Project Methodology:

### Core Support Methodology

Polar Systems methodology for asset monitoring, management and support is heavily grounded in incorporation of industry best-practices and enhanced by use of best-in-breed Managed Service Provider (MSP) technology applications. Our PolarStar Network Service makes use of these top-tier applications:

**Kaseya** is our IT Automation and systems' monitoring and management platform. This software was developed to optimize the technical management aspect of service delivery. The solution encompasses network monitoring and alerting, Microsoft Windows Event Log monitoring and alerting, secure remote desktop management, patch management, computer inventory and auditing, software deployment, and reporting capabilities in an integrated web-based platform.

**Autotask Pro** is our Professional Services Automation tool. This software was developed to optimize the business management aspect of service delivery. It encompasses service desk, project management, scheduling & dispatch, Client Access Portal, Co-Managed Help Desk, CRM, contract management, time-tracking, billing, and reporting capabilities in a web-based platform.

Regardless of technology tools, our service would not be possible without our extremely talented technical staff. Polar Systems' technical team holds many of the most sought after industry certifications. This provides for a well-trained, technically proficient support team with a breadth of technical expertise. Our technical staff holds certifications such as Microsoft Certified Systems Engineer (MCSE), Microsoft Certified Systems Administrator (MCSA), Cisco Certified Network Associate (CCNA), Citrix Certified Administrator (CCA), and many other industry certifications.

We strive to always employ a systematic troubleshooting model that includes:

- |   |                                       |
|---|---------------------------------------|
| (1) Problem Definition                    | (2) Information Gathering             |
| (3) Determination of Probable Cause       | (4) Resolution Plan                   |
| (5) Implementation of Resolution Plan     | (6) Observation of Results            |
| (7) Repeat the process if unresolved, and | (8) Documentation of Issue Resolution |

### Network Servers

Polar Systems provides comprehensive monitoring, management and support services for network servers. Through use of our PolarStar Network Service tools above, we provide 24x7x365 server monitoring and alerting, asset inventory, reporting, disk utilization analysis, Windows Event Log analysis, automated server operating system patching, remote troubleshooting, and unlimited fixed-fee technical support. PolarStar Network Service solutions poll Windows Management Instrumentation (WMI) data in order to provide extremely detailed and granular level insight.

### E-Mail Servers

Polar Systems offers e-mail server monitoring as described above. In addition to the services provided for basic network servers, we also monitor critical e-mail services, e-mail DB trends, and provide consulting in regard to email archiving and retention policies and solutions. PolarStar Network Services primarily supports the Microsoft Exchange Server platform. Polar Systems is a Microsoft Gold Certified Partner, and has achieved the Exchange Migration and Deployment Specialization.

### Desktops / Laptops / Printers

Polar Systems provides a wide variety of desktop support services. PolarStar Network Service services may include desktop monitoring and alerting, asset inventory and reporting, automated workstation OS patching, remote and onsite troubleshooting, or a comprehensive desktop support solution which includes unlimited Help Desk support.

PolarStar Service clients have various IT staffing levels. Many of our clients have a small IT staff, and we provide limited staff augmentation or escalation services only. In this scenario, the client's existing IT staff may maintain responsibility for desktop management and maintenance services. Polar Systems provides efficiencies to these clients by assuming responsibility for the network and server management, freeing up the client's internal resources to focus on tasks they perform most proficiently. Polar Systems also offers a "Co-Managed Service Desk," which allows our clients to avoid the costly purchase of help-desk software, and to improve the service collaboration between ourselves and our clients.

Polar Systems provides limited network printer support services. Services include routine printer and print server troubleshooting, print driver updates to ensure system stability, and some monitoring and alerting for basic functionality of print services. Polar Systems provides limited printer hardware maintenance and support services.

## Network Security

Polar Systems recommends a multi-tiered approach to network security for all of our clients. From a network architecture and design standpoint, security is one of our key focuses.

Polar Systems recommends implementation of security layers at the Internet, network perimeter, host, and application levels. Technologies may include e-mail and web-based threat management, firewall and VPN products and solutions, anti-virus and endpoint protection software, and in some cases an Intrusion Detection or Prevention System (IDS/IPS).

With all of these security technologies deployed, one must not forget to apply best practice security hardening on the host devices through routine operating system and application patching, disabling unnecessary services and ports, ensuring appropriate data security permissions and rights, and potentially implementing encrypted file structures.

Remote network access is common. Network security often must be designed to ensure the security posture extends beyond the organization's physical confines, yet remain flexible enough for secure remote users. Polar Systems has vast experience with deployment of secure remote access technologies, such as Site-to-Site VPNs, Client Access VPNs, SSL VPN gateways, Citrix and Microsoft Terminal Server solutions, and 2-Factor Authentication security solutions. At the core, network security procedures employ an iterative process - requiring constant assessment, testing, remediation, and documentation.

## Network Bandwidth

Polar Systems offers products and services designed specifically for network bandwidth monitoring and management. Network bandwidth monitoring may be achieved on many levels, so a thorough understanding of an organization's desires would be required for sound approaches. At one end of the spectrum may be use of existing Microsoft Windows utilities such as Network Monitor or Performance Monitor for internal local area network bandwidth monitoring. At the other end, a client may implement a total network visibility tool which may provide network bandwidth insight.

## Applications and software

Polar Systems can offer application and software monitoring to the extent capable based on the particular software package. Oftentimes this is restricted to server-based application databases and critical network server services.

Polar Systems' technical support team has numerous years of experience working in a diverse set of clients, thus have provided support services on a broad array of software applications. Our troubleshooting methodology for software application issues follows our standard systematic troubleshooting approach.

## Monthly Patching

Polar Systems methodology for software upgrades, patches, service packs and hot fixes is rooted on industry "best practices," yet leverages our unique managed services platform.

All MSFT OS patching, updates and hot fixes fall under our general PolarStar service contracts. Prior to deployment our team performs extensive research and development, and follows a strict implementation approach. Polar Systems investigates these updates, and, to the extent possible, performs deployment testing on our internal equipment prior to deploying on our client's systems. Polar Systems will provide our expert advice on which patches should or should not be applied. For those approved patches, we leverage the use of our managed service technology to deploy patches to select systems at a time most convenient for the client. Polar will consult with the client to determine the best scheduled maintenance window.

## Email spam protection

Polar Systems recommends implementation of MX Logic, Inc. Email Defense Solutions. MX Logic, Inc. is a managed security services provider of email and Web security services. The solution offers comprehensive protection against a vast array of email threats including spam, viruses, spyware, and phishing attacks. Protection is provided by combining spam filters, multiple anti-virus scanning engines, content filtering, and sophisticated email attack protection. Advanced services are available for disaster recovery and message archiving solutions.

Such a managed security service provides the following benefits:

- Reduced organizational risk and liability
- A multi-tiered approach to threat management
- Ease of administration
- Increased productivity
- Efficient activation and implementation
- Rapid Return on Investment (ROI)

PolarStar clients who maintain their own e-mail server receive MX Logic Email Defense service as part of the base contract.

## Antivirus protection

Polar Systems recommends a multi-tiered approach for anti-virus protection. Implementation of the MX Logic security services for perimeter filtering should be combined with host-based anti-virus protection. Polar Systems recommends and supports anti-virus and endpoint protection product suites available from Kaspersky, MalwareBytes, and Kaseya.

These solutions provide a high-level of anti-virus security management and reporting. Included in most suites is a centralized management, monitoring and reporting console. From this console, installation packages, updates, and definition files may be remotely installed to network servers, workstations, and mobile devices. Product policy configuration and scheduled scan tasks may also be administered and propagated. Groupware protection for e-mail databases may be included as well.

## Spyware protection

Polar Systems recommends and supports multiple spyware/malware protection solutions. The most common solutions supported by Polar Systems are product suites provided by Kaspersky, MalwareBytes, Kaseya, and Websense. Current anti-virus and endpoint protection products typically include a base level of spyware detection, protection, and removal features.

These solutions are often integrated into a vendors' threat management console. Common features include daily threat database updates, scheduled detection and removal scanning tasks, and protection against phishing and pharming attacks.

The solutions provided by Websense, Inc. often enhance an organization's security posture relevant to spyware protection. Their solution offers inbound and outbound spyware blocking services. If a monitored device browses to a site infected with spyware, those transmissions will be blocked on their inbound transmission. Similarly, if a monitored network device is detected to have spyware or malware components present, any back-channel transmissions to the Internet are blocked at the network egress point. These services provide enhanced security relative to an organizations' sensitive or confidential information, ensure a safer online experience, and reduce legal liability related to a potentially disastrous data leak.

## Managed Backup and Disaster Recovery

Polar Systems recommends that data backups be monitored on a daily basis. Approved backup solutions included Symantec Backup Exec products, Unitrends, and PolarStar Backup & Disaster Recovery (BDR) units. Other backup solutions may be authorized if approved by Polar Systems. Backup management includes the following services: notification to client of backup errors, labor to resolve errors, consultation on improving backup strategies, reasonable configuration of backup solutions, and a simple file restore performed on a monthly basis.

## Firewall Management

Polar Systems supports numerous hardware and software firewall technologies. The most common firewalls are the Cisco Systems Adaptive Security Appliance (ASA), Cisco PIX, SonicWALL, and Juniper. Devices may be managed through a variety of techniques, given each device's capabilities. Many firewalls have embedded monitoring and alert notification mechanisms which may be leveraged. Nearly all devices may also be monitored through SNMP and by accessing the MIB.

Polar Systems provides security design, implementation and support services on these firewalls. For PolarStar Service clients, we provide configuration backup and restoration, access-list and security rule modification, software code updates and critical patch application services. Polar Systems may configure the client firewall such that Secure Shell (SSH) and/or HTTPS encrypted access is allowed in a restricted mode from the Polar Systems public IP address for ongoing support requirements.

## Virtual private network (VPN) and remote access

Polar Systems provides network design, implementation and support services for a diverse set of Virtual Private Network (VPN) and Remote Access technologies. The most common VPN platforms implemented and supported are the Cisco Systems Adaptive Security Appliance (ASA), Cisco Systems PIX, SonicWALL, and Juniper product lines. Alternative supported methods for remote access include deployment of MSFT Terminal Services and Citrix XenApp software.

Polar Systems also provides implementation services for SSL VPN technology. SSL VPN provides a more flexible and secure method of extending network resources to remote users, and allows for web-based clientless access without previously installed system software.

## Operating Hours & Response Time Information

Polar Systems' PolarStar Network Services provide automated monitoring support 24x7x365.

Polar Systems maintains a staffed Help Desk and Technical Support Engineers available weekdays from 8:00 a.m. to 5:00 p.m., excluding holidays on which Polar Systems is closed for business. Polar Systems' holidays are New Year's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving, Thanksgiving Friday, and Christmas. Polar Systems has optional offerings for 24x7 Services, and may negotiate other support operating hour arrangements as necessary to ensure client coverage.

**PolarStar Service includes response time of 1 hour or less, depending on issue severity. Though average response time across our client base is typically less than 15 minutes. Resolution times vary greatly depending on the nature of the issue. For PolarStar customers we can capture and report on response and resolution time metrics.**

### Response Times:

- Critical, Enterprise-wide issues – 30 minute response time
- High priority issues – 30 minute response time
- Normal issues – 1 hour response time
- Low issues – 1 hour response time

## 24 x 7 Services

Polar Systems provides optional 24x7 Services for support coverage outside of Polar Systems' regular business hours. Clients are provided an 800 phone number to initiate a Service Support call, and a customized 24x7 Service Support phone tree with assigned technical resources is developed.

24x7 Service Support calls are initiated by the client, and fielded by our outside agency which will note the client name, location, contact, and contact call-back number. Our Emergency Service will place notification phone calls through the phone tree to the technical resources' mobile and home phone numbers. The triage continues until a Polar Systems employee is contacted directly.

The technical responder will then contact the client. When appropriate, remote services will be the preferred method of troubleshooting and resolution; otherwise, the technical resource will dispatch to the client location within the hour. For 24x7 Service Support oversight, the final contact for every Emergency Service Support phone tree is our President.

## Rates Table

### Support Services Rate Sheet

#### Business Hours

Standard Hours.....8:00am – 5:00pm, Monday through Friday (excluding holidays)  
 Extended Hours.....6:00am – 8:00am & 5:00pm – 8:00pm Monday through Friday; and first four hours on Saturday  
 After Hours.....8:00pm – 6:00am, Monday-Friday; after four hours on Saturday, all day Sunday and Holidays

**\*\*Hourly rates include 10% for PolarStar Managed Service customers\*\***

#### Time & Material Service

Network Engineer (General Services).....	\$148.50/hour
vCIO Services.....	\$203.00/hour
Network Engineer (Senior Design, Auditing & Consulting).....	\$180.00/hour
Network Engineer (Security, Storage, Disaster Recovery, Virtualization).....	\$180.00/hour
Network Engineer (SAN Design, Management Consulting).....	\$203.00/hour
Application Solutions (Senior Consulting, Implementation, Training, Programming).....	\$167.00/hour
Onsite Travel Charge (round trip within 20 miles radius).....	\$50.00/flat

Extended Hours service rates are 1.5 times the applicable rates, portal to portal  
 After Hours service rates are 2.0 times the applicable rates, portal to portal

On-Site support is billable with a 2-hour minimum, plus on-site travel charge.

## Inbound Support Process

Client support issues are initiated in one of four methods, (a) Client phone call, (b) Client e-mail, (c) Client Access Portal / Co-Managed Service desk ticket, and/or, (d) automated monitoring system alerts.

Polar maintains a centralized Help Desk available by phone and via support email address. On notification of a client issue, a Service Desk Ticket is created in our Professional Services Automation (PSA) application and the triage process begins.

1<sup>st</sup> Level Technical support will be provided by Polar Systems' Help Desk personnel. Our Help Desk personnel will contact the client, assess the issue, and attempt resolution. Troubleshooting will be provided via phone through direct guidance and/or via use of remote support tools. In the event an issue requires escalation, decisions will be made with respect to additional remote support or on-site visit requirements, and escalation plans and response times communicated. The Service Desk Ticket will be updated, placed in a support queue and assigned to an appropriate technical resource.

2<sup>nd</sup> Level Technical support will be provided by an appropriately qualified technical resource. The technician will initiate communications with the client and perform troubleshooting and remediation through the use of remote sessions whenever possible and appropriate. In the event the issue is still unresolved, the Polar Systems' support team will schedule a site visit.

## Outbound Support Process

Similar to the inbound call triage process, Polar Systems Help Desk personnel will typically be the 1<sup>st</sup> Level Technical Support.

Our Help Desk personnel will contact the client, communicate the issue identified, assess the situation, and attempt resolution. Troubleshooting will be provided via phone through direct guidance and/or via use of remote support tools. In the event an issue requires escalation, decisions will be made with respect to additional remote support or on-site visit requirements, and escalation plans and response times communicated. A Service Desk Ticket will be created and updated, placed in a support queue and assigned to an appropriate technical resource.

2<sup>nd</sup> Level Technical support will be provided by an appropriately qualified technical person. The technician will initiate client communication and perform troubleshooting and remediation through remote sessions whenever possible and appropriate. In the event the issue is still unresolved, the engineering resource will communicate updated timelines and schedule a site visit.

## Network Uptime

The single largest contributors to high availability and network uptime rates are through adoption and enforcement of a proactive Support methodology, including development of a thoroughly tested business continuity plan. As a result, PolarStar clients have benefited from an extremely high rate of network uptime. Most business impacting network outages have proven to be related to outside service providers not under administrative control of Polar Systems, Inc.

Polar Systems cannot guarantee performance or availability of any provider, including but not limited to, power companies, data and phone line providers, Internet Service Providers (ISPs), Software as a Service (SaaS) providers, or other providers.

## Client Escalation Process

Polar Systems encourages frequent and effective communications with all of our clients. In the event there are problems of a technical, business development, account management, personnel, or other nature our clients have a clear escalation path.

Problem notification and escalation process for technical items should be initially processed through our Help Desk. The next levels of escalation would be, in order, our Professional Services Manager, the Practice Manager, and Business Development Manager. If the issue is still not resolved satisfactorily, our President will intervene.

## Quarterly Business Reviews

PolarStar clients receive Quarterly Business Review (QBR) meetings. The QBRs are designed to be interactive, consultative, and may include as many client personnel as desired. The quarterly report is customized to each client's needs. Additional reporting that commonly occurs during the QBR is an assessment of trend data, any planned short-term or long-term IT budget expenditures, critical software and hardware device warranty and maintenance status, as well as project proposal plans under discussion.

## Strategic Planning & Consulting

One of Polar Systems' key missions is to assist clients in developing an optimized approach to Information Technology strategy, which is aligned with main business objectives. Our Senior Engineers and Consultants work with client management teams to assess short-term and long-term business goals. Collectively our teams discuss the pros and cons of various strategies, evaluate competitive advantages, and analyze the business and financial impact with any strategy.

PolarStar QBRs are designed in part to ensure an eye is always on evaluation of the IT strategy and to ensure that IT stays aligned with the business goals of the organization. Additionally, Polar Systems often brings new ideas to the attention of our client's, strategies that we have seen succeed in other organizations, or purposes of discussing newly emerging technologies.

## Project Management

Polar Systems has vast expertise in Project Management. We have Consultants who have attended the Project Management Institutes' PMP certification curriculum, and who have years of experience acting in a PM role.

The very nature of our business necessitates that we function in this role on a daily basis. We frequently provide Project Management services to our clients with limited technical staff. Often the engagement entails application or solution assessment and analysis services, or design and implementation services for projects that either we provide deployment services for or that 3<sup>rd</sup> party software vendors deploy

## vCIO Services

Polar Systems provides strategic direction and thought leadership to a variety of verticals in the Portland Metropolitan area by leveraging our market research and best practice development. IT strategy development is an essential part of the organizational culture, overall strategy, and the financial resources available to execute. Our vCIO's approach to strategy development involve engaging all levels of the organization and challenging conventional wisdom surrounding the notion of "this is always how we have done it." For an organization to be successful, its technology environment must support the direction of the leadership. Polar works to enable transformation by aligning IT with the top level vision of the organization.

Many companies succeed in planning great vision and strategy but fail to produce results. Driving change involves both planning and execution. Many organizations fail to launch when it comes to delivering on the best laid plans. Polar Systems vCIO's leverage industry accepted project management methodologies that guide change and keep in balance planning and execution. Supporting the vCIO position at Polar Systems is a team of talented change agents skilled in delivering execution of technology projects.

## Additional Project -capabilities with customized delivery as per client requirements

- Organization Technology Strategic Planning and Execution
- IT Budget Development and Management
- IT Vendor Sourcing and Management
- IT Contract Negotiations and Management
- IT Department Service Level Agreement Development and Management
- Internal and External Organization Stakeholder Engagement
- Enterprise IT Project Management

**CITY OF OREGON CITY  
 INFORMATION TECHNOLOGY DEPARTMENT  
 REQUEST FOR PROPOSALS**

**April 30, 2013**

**NETWORK ANALYSIS AND SUPPORT SERVICES**

**Bid Proposal**

We, the undersigned, do hereby agree to provide to the City the services outlined in this contract by entering into a Personal Services Agreement for the following rate:

UNIT	PRICE
<b>NETWORK ANALYSIS</b>	
One time, all-inclusive price	\$ <u>INCLUDED</u>
<b>SUPPORT SERVICES</b>	
Bid price for <b>monthly</b> rate	\$16,380/month (140 users @ \$117)
<i>**Projects outside of the scope will be billed at an additional T&amp;M rate based on agreed upon SOW**</i>	

After hours rates shall be agreed upon by the City and Contractor when negotiating the contract.

COMPANY NAME: Polar Systems, Inc

Check one: Corporation  Partnership \_\_\_\_\_ Sole Proprietor \_\_\_\_\_ Other \_\_\_\_\_

Employer ID Number: 93-0786782

<b>Exhibit C</b>
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THE POWER OF EXPERT IT



## Site Assessment Overview

**Designed for:**

**City of Oregon City**

April 30<sup>th</sup>, 2013

*Designed By:  
Polar Systems, Inc.*



**Advanced Infrastructure Solutions  
Networking Infrastructure Solutions**



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## **Polar Systems, Inc.**

Polar Systems, Inc. appreciates the opportunity to provide a proposal. Polar Systems has been locally owned and operated in Portland, OR for over 30 years. Our focus throughout the years has been to provide professional network consulting services to the small-medium business market in the Portland-metro area. Polar Systems' network engineers have worked in a number of industries, and have expertise in a vast array of technology areas. We offer consulting and implementation services for core network operating systems, security systems, business continuity and disaster recovery solutions, and storage-area networking solutions. Polar Systems is also one of the leading Managed Service Providers in the Pacific Northwest. These services provide continuous monitoring of the critical network infrastructure to ensure our clients' networks are performing optimally at all times.

## **Network Site Assessment & Roadmap**

### **Purpose**

A Network Site Assessment and Roadmap will baseline the network infrastructure and suggest improvements to that infrastructure. The baseline Site Assessment becomes a foundation for network documentation and the project objectives that follow. No project comprehensively addresses every conceivable issue, but strong baseline documentation provides the working list from which objectives are prioritized.

After assimilating City of Oregon City's existing infrastructure and IT culture, Polar Systems will suggest changes and improvements. These recommendations will be guided by client preferences and a vision for optimal networks which Polar has developed servicing thousands of area networks. Our clients have come to trust our ability to maximize system functionality and keep overall system costs low. From the project recommendations, the client will determine goals, and Polar Systems will assist in creating an optimal Roadmap to reach these goals.

### **Process**

Polar Systems' Site Assessment & Roadmap maximize efficiency and relevance through *expertise* and *close communication* with the client. The success of our product is rooted in the combination of *Technical Focus* and *Managerial Circumspection* which we've worked hard to develop for our clients.

Our process can be divided into 3 phases, each intimately involving the client. These phases are:

- 1. System Inventory, Documentation, and Baselineing**
- 2. Recommendations**
- 3. Road Map**

Each phase is detailed and expanded in the following sections.

### **1. System Inventory, Documentation, and Baselineing**

Phase I describes the existing network infrastructure in terms useful for a broad audience. The Inventory ensures a comprehensive view of system components, Documentation details the configurations of these components, and Baselines provide snapshots useful in problem identification and trend analysis.

The first task is a meeting with key management and information systems staff. The assessment steps will be outlined during this meeting, required passwords and current documentation will be gathered, and day-to-day network issues will be discussed. Criticality of applications and services provided by the network, downtime tolerance, and maintenance window(s) are reviewed.

The Inventory and Documentation of the system is gathered in three specific **assessment areas**:

1. **Network Infrastructure**
2. **System Hosts**
3. **Applications**

Each of these areas is broken down into many sub-components.

These areas are evaluated against specific **assessment criteria** that we have found to be relevant to a "best practices" network infrastructure. These criteria are:

1. **Reliability**
2. **Scalability**
3. **Manageability**
4. **Efficiency**
5. **Remote Accessibility**
6. **Security**

As with the assessment areas, each of these criteria is subdivided into specific touchstones.

Using these six criteria in each of the assessment areas, a complete review of the network design and physical environment will be completed. Various software tools will gather inventory information from devices and log files such as OS logs. Error and tape backup logs will also be reviewed.

E-mail applications, backups, and common databases will be inventoried for configuration. Day-to-day network issues discussed in the initial meeting will be reviewed for possible recommendations or correction. Current network diagrams will be reviewed and updated or new diagrams will be created.

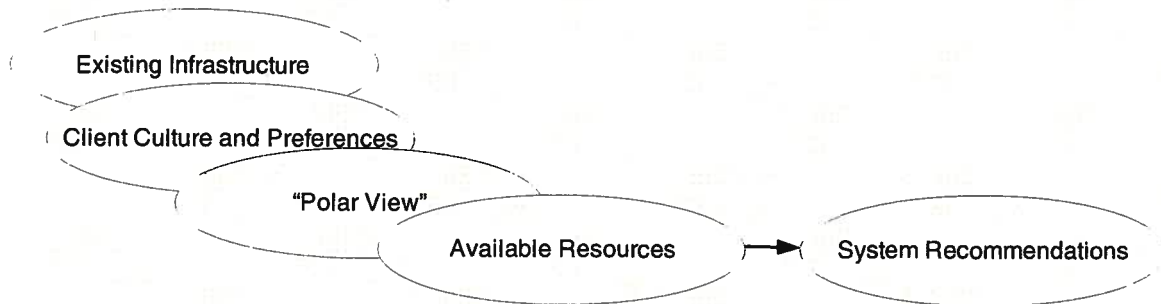
While the primary goal is long term planning, all work will be performed in the context of the "Polar View" network. These best practices have been developed by industry standards and the experience gathered by Polar in thousands of networks over a 20 year period. The six characteristics of the "Standard LAN/WAN" are *reliability, scalability, manageability, efficiency, remote accessibility, and security*.

Each of these six considerations is optimized in all of our work, from proposal to maintenance. *Reliability* is affected by the way the hardware is configured, servers patched, applications installed, networks designed. *Security* varies with customer needs, but some level of security protections are considered essential on a standard LAN/WAN. *Efficiency* relates to the network, application, server and workstation configurations. One way to insure a network is running properly is to install *manageable* components - servers that alert you when issues arise, switches that alert you as to which ports are having problems, and so on.

## **2. System Recommendations and Proposals**

Armed with network documentation and a sense of the values and strengths of City of Oregon City, Polar Systems will propose a means to optimize the network in each of the six assessment criteria: Reliability, Scalability, Manageability, Efficiency, Remote Accessibility, and Security.

These recommendations will be formulated in the context of the existing network, the preferences of City of Oregon City, and availability of resources.



Once completed, the proposal will form the basis for the second formal meeting in the project. At the second meeting Polar Systems will present:

1. Documentation produced in phase one of the project.
2. Concrete recommendations for system improvements.

This phase delivers detailed recommendations for improvements, reflecting the needs & values of City. Polar will deliver a proposal that is very close to the actual project that City will execute. However, there will likely remain some decisions to be made and options to be exercised. To assist, Polar will detail:

1. The recommended priority and/or urgency of each action.
2. The compelling reasons suggesting such actions.
3. Rough estimated costs for each action.
4. The viable options that exist in addressing a particular need.
5. The significant factors that distinguish the options.

In most cases, Polar can provide the information for the client to make rapid decisions about an IT project: what to do first, and how to decide. The meeting is well-prepared and highly interactive, and it produces a list of tentatively-approved project objectives.

### 3. Roadmap

Once the goal is clear, it's time to plan the project roadmap. It may seem that the course is set by this point, but this is not always the case. There are factors that might be optimized in project execution. For instance:

- |                               |  |
|-------------------------------|--|
| - Total deployment cost       | - Deployment success probability           |
| - System down time            | - Accommodation of legacy systems          |
| - Data migration requirements | - Fall back options                        |
| - Accelerated Deployment      | - Accommodation for unplanned requirements |

Many items in this list have the potential to overlap. To simplify the optimization of a complex consideration, Polar will typically provide a Roadmap which optimizes two of these criteria (cost and success probability). From that template, smaller adjustments can generally be made

Phase 3 sets up a final meeting of the project. In this meeting, Polar Systems will:

- Clear up questions from the "Recommendations" meeting
- Specify project costs and project sequence.
- Recommend third party providers, if appropriate.
- Present the Roadmap for project execution
- Identify project dependencies.
- Recommend roles for each party.

At this point, the objectives, participants, sequences, and costs of the project will be established. City of Oregon City will have a project plan with which they have closely contributed at every phase.

The Project Plan is a Working Document which breaks out the process from starting point to the proposed network. The plan will have a certain amount of detail, and include steps that require new hardware, hardware reconfiguration, and workstation or network changes. The idea is to properly plan for what steps will require down time and what steps will require workstation touches. The plan includes steps that will be performed by the client and allow the client to decide which steps are best done by different parties.

During the Project Plan review, times will be assigned to each step, and dependencies reviewed to ensure nothing is missed. There will be a review of required changes, and the impact of changes on remote laptop users. The ideal plan is one where the users do not know that changes have occurred. Many changes will require downtime of certain systems, and may require changes to workstations.

Generally when workstation changes are needed, as many changes as possible are planned at one time without doing too much at each workstation. A checklist is created and tested. A checklist is then placed at each workstation so that all involved in the updates may see updates status for any workstation. Sometimes the best workstation updating method is visiting each and performing the required function. We generally recommend that all workstations conform to certain standards to reduce variations, in order to ease management efforts.

## Summary:

This document presents the process & methodology Polar Systems uses in working with clients to design, construct, and support networks. By performing thorough discovery and planning, the probability of project success increases significantly. A network that is reliable, scalable, manageable, efficient, accessible, and secure, is essential for a company to accomplish mission critical business objectives.

## The Process

1. System Inventory, Documentation, and Baselineing
  - a. Site Assessment
    - i. Meet with the Client staff to discuss issues, goals, current structure
    - ii. Perform Site Assessment
    - iii. Create Proposal Document
  - b. System Recommendations and Proposals
    - i. Meet with City of Oregon City staff to discuss proposals and recommendations
    - ii. Create Project Objectives
  - c. The Road Map (if applicable)
    - i. Create Road Map
    - ii. Meet with the Client staff to go over Road Map
    - iii. Make adjustments to plan based on meeting discussions
    - iv. Begin implementing plan

## Project Caveats

1. Activities critical to delivering services require the input and participation of City of Oregon City's staff. This includes requirements gathering, design, work sessions, and day-to-day engagement. Accomplishing joint objectives is dependent upon this interaction. City of Oregon City will therefore make time available and provide Polar Systems' team with access to key users and personnel.
2. City of Oregon City will ensure access to all locations where network devices are located, as well as grant administrator-level credentials to Polar Systems' staff as required.
3. Professional Services in the areas of extensive troubleshooting, remediation, configuration change, or end-user support are beyond the scope of this project. If such services are required, the respective Project Managers will coordinate additional arrangements for these services to be performed.
4. Internet and Wide-Area Network links are assumed operational during the course of the project.
5. System, server and workstation backups are the responsibility of City of Oregon City. This includes the development and implementation of all system backup and recovery programs.
6. Following are examples of billable work and have been factored into the estimated Scope of Services:
  - Phone time to discuss the project
  - Project planning, managing, status reporting
  - Producing the required follow-up documentation
  - Meetings regarding the project
  - Design, configure, implement, test the solution

## Virtualization Assessment

As a part of this General IT Site Assessment, Polar Systems will also deliver a Virtualization Assessment to the City of Oregon City. The purpose of this is to provide the City of Oregon City a complete understanding of the total costs and resources required for a virtual conversion, as well as efficiencies and benefits to be gained. Additionally, it will identify the appropriate supporting technologies, phased project-approach and potential risks.



THE POWER OF EXPERT IT



# IT Support Proposal Summary

**Designed for:**

**City of Oregon City**

April 30<sup>th</sup>, 2013

*Designed By:  
Polar Systems, Inc.*



**Advanced Infrastructure Solutions  
Networking Infrastructure Solutions**



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# Polar Systems - Managed IT Support Proposal Summary

The purpose of this proposal summary is to provide to the City of Oregon City options (A, B and C below) in levels of onsite support and services. PolarStar Managed IT Support includes unlimited remote and onsite support as it relates to triage and problem resolution for the IT environment in scope for ongoing management. Option A includes this PolarStar Managed IT Support. Options B and C offer additional Onsite and vCIO support services as an extension to the base-level PolarStar Managed IT Support. As a necessary component toward gaining an understanding of IT's present state, with the purpose of developing an IT roadmap and strategic plan, an IT Site Assessment is included in options A, B and C. Also attached is a customer story for Cowlitz Family Healthcare Center in Longview, WA. We believe CFHC provides a very relevant example of Polar's ability to support organizations similar to the City of Oregon City both in size and nature of IT projects.



## SERVICES SUMMARY

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	Oregon City, OR, 97045	Fax:	

Qty	Description
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## PolarStar Network Services

	<u>Services:</u>	<u>INCLUDED</u>	<u>EXCEPTIONS</u>
24	Server Management	Y - 24 servers	
	Asset Auditing/Inventory	Y	
	Monitoring/Alerting	Y	
	Patch and Maintenance Event	Y	
	Backup Management	Y	
	Anti-Virus Management	Y	
	OS Management	Y	
	E-Mail Management	Y	
	Anti-Spam Management	Y	
	DNS Hosting	Y	
	Network Device Management	Y	
	UPS Management	Y	
150	Desktop/Laptop Management	Y - 150 workstations	
	Mobile Device Management	Y	
	Printers and Other Device Management	Y	
	Vendor Relationship Management	Y	
	Quarterly Consultation	Y	
	Reporting	Y	
	Guaranteed Response Time	1 Hour	30 Min for High Severity
	Additional Network Services	Y	
	Scheduled On-site Support	Y - Included in Options B and C	
	Reduced Hourly Labor Rates for the contract period	10%	

12/16  
12/15  
12/15  
12/15  
12/15

1250



Polar Systems understands how critical onsite support is to the success of City of Oregon City IT, and how important it will continue to be in the transition a more proactive, strategic state. As such, we have provided support options that include onsite support in numerous capacities. Both options provide twenty (20) hours of onsite support weekly. This would typically include the day-to-day tasks associated with supporting the City's user-base, as well as network documentation, and ongoing management activities. These twenty hours are in ADDITION to any onsite support required within PolarStar Managed IT Support. Option A provides limited vCIO services of two (2) hours per month. Option B includes eight (8) hours per month of vCIO services. vCIO services would typically include project management, stakeholder representation, vendor & technology assessment & management, IT roadmap and strategic consulting, budgetary development, staff development, and more. Polar Systems vCIO services are designed with the flexibility needed to support the unique needs of your organization. As a part of the onboarding process, a plan would be developed to reach mutual agreement of the best use of vCIO resources in support of the City of Oregon City. These support models were built based upon Polar's understanding of the City's onsite requirements and diverse user-base. Should the City of Oregon City wish to move forward with a model including onsite support, but not necessarily as allocated in Options A and B, Polar Systems has the flexibility to draft an optimized onsite support structure.

### **Option A -- \$100 per user/month**

Includes:

- 1) PolarStar Managed IT Support Service as detailed above
- 2) City-wide IT Site Assessment
- 3) \*Twenty (20) hours per week of dedicated Onsite Support, for two years
- 4) Two (2) hours per month of vCIO services, for two years

### **Option B -- \$117 per user/month**

Includes:

- 1) PolarStar Managed IT Support Service as detailed above
- 2) City-wide IT Site Assessment
- 3) \*Twenty (20) hours per week of dedicated Onsite Support PLUS "clean-up" activities, for two years
- 4) Eight (8) hours per month of vCIO services, for two years

\* Examples of "clean-up" activities would include Active Directory clean-up, re-organization, group policy re-organization, addressing security issues identified in IT Site Assessment, and network tuning. Examples of activities EXCLUDED from "clean-up" include but are not limited to: Server migrations, major network re-architecting, virtualization design and implementation



## **Case Study - Cowlitz Family Health Center IT Rebuild with Server Virtualization**

A national medical systems consulting firm surmised that updating Cowlitz Family Health Center's network infrastructure would be like peeling an onion, with each underlying layer presenting its own set of issues. They recommended hiring an IT management firm to assist. Polar Systems was selected.

### **The Preliminaries:**

The task of updating a network infrastructure can be daunting, and is one that is often postponed because it can be like peeling an onion – you get through the outside layer only to discover that a simple update may not be sufficient and a more complete overhaul is needed. For Cowlitz Family Health Center (CFHC) of Longview, Washington, that proved to be the case as they undertook a program to modernize their email and practice management systems. In the process, CFHC realized that their in-house IT person was not going to be fully capable of handling the upgrade alone.

### **The Project:**

The project began when clinic managers decided that they needed to revamp their 25-year-old system for keeping patient records. To get recommendations on how to proceed, they hired a national medical consulting firm with expertise in the latest electronic medical records (EMR) and practice management systems. Along with making a recommendation on what new scheduling and billing system to use, the consultants recommended that CFHC hire an IT management firm to assist Cowlitz' internal IT staff with the installation. Responding to Cowlitz' RFP, Polar Systems, Inc. was selected to partner with the clinic for the upgrade.

At the time Cowlitz started working with Polar Systems, their whole network (all software and hardware) was contained at the clinic's Longview, Washington headquarters. The Longview network consisted of a patchwork of two mid-sized servers, with five PC workstations that also worked as servers, and a virtual network. The Longview staff, as well as personnel at the clinic's two remote worksites (there were approximately 125 users in total, spread between the clinic's three locations) needed to go through a very cumbersome process to access records at the main site which included logging into multiple software applications separately. In addition, the clinic's email software was archaic and didn't offer the functionality of contemporary email systems.

### **Step One:**

The first step for Polar Systems was to evaluate the existing system framework and assess the client's needs. As part of the company's PolarStar service, Polar provided a team of 'CIO-level' analysts with the expertise in system design and implementation that enabled them to quickly calculate that CFHC's current infrastructure would not support what they wanted to do. A complete rebuild of the clinic's IT system, from top to bottom, was launched.

The rebuild was broken into three phases, and during the process Polar managed and maintained Cowlitz's existing network so as not to disrupt on-going daily work activity. "During this process our team was onsite at CFHC's two or three full days per week," says Ken Colton, Polar Systems' Director of Operations. "In phase one, we moved their current applications without change to a more robust infrastructure. In phase two we converted CFHC outdated email system to Microsoft Exchange, and in phase three implemented a single log-in for all applications based on thin client computing. This simplified and streamlined how the remote sites connected to the main site."

### **Server Virtualization:**

Cowlitz' in-house IT person had begun implementing a server virtualization environment, but had made some incorrect implementation decisions. Based on Polar's core competency in this area, they decided to unravel what had been done and re-implement the virtualization using VMWare, a more standard and robust architecture.

The new system uses fewer servers than the previous one, but uses them much more efficiently. "Virtualization was key to the successful restructure of Cowlitz' network," says Ken Colton. "It enabled Cowlitz to cut server and space costs and energy usage, and it will allow them to grow and expand their data-driven business with relative ease."

### **The End Result:**

The entire process took approximately five months, and was worth the time and financial investment. Cowlitz' Finance Director Norm Kraft says, "Before the upgrade our IT person had to run all reports himself using our 25 year old practice management system. Now anybody that has authority can run a report, and they're produced in real-time. We can view the information on the screen, create a PDF, or create an Excel spreadsheet. This upgrade has made our business more efficient."

Polar Systems has recently been able to change their focus at CFHC from improving the clinic's network to maintaining the network and taking care of employee needs that arise. This is all part of the PolarStar network management service, which includes an on-call help desk, with the ability to perform remote diagnostics and servicing of clients' networks whenever necessary. To ensure that face-to-face contact is maintained and that Polar is kept up to date on Cowlitz' IT needs, Polar Systems engineers make on-site visits to CFHC at least once or twice per month.

"Beyond solving the clinic's system reliability issues and bringing them into the 21st century and to the leading edge of technology, our continuing involvement as part of the PolarStar service ensures that CFHC's IT system will continue to thrive," says Ken Colton. Norm Kraft adds, "One significant advantage to outsourcing this work is having a team that responds to the projects that we have prioritized. No task is too vast or gets pushed to the back burner. This work has created a lot of stability and reliability within our system. The investment we made, and continue to make with Polar is money well spent. We're confident that the support that Polar provides will serve us well into the future."