



# MONROE CITY COUNCIL

## Agenda Bill No. 20-130

|                 |   |
|-----------------|---|
| <b>SUBJECT:</b> | <b>ISOutsource Agreement for Exchange to Microsoft Office 365 Upgrade and Date Migration to SharePoint Online</b> |
|-----------------|---|

|              |              |                 |                   |                   |
|--------------|--------------|-----------------|-------------------|-------------------|
| <b>DATE:</b> | <b>DEPT:</b> | <b>CONTACT:</b> | <b>PRESENTER:</b> | <b>ITEM:</b>      |
| 8/25/2020    | IT           | Ben Warthan     | Ben Warthan       | Consent Agenda #8 |

**Discussion:** 08/25/2020  
**Attachments:** 1. Agreement Exchange to Microsoft Office 365  
 2. Agreement Data migration to SharePoint online

**REQUESTED ACTION:** Authorize the Mayor to sign contract with ISOutsource for 2 Projects: 1) Exchange to Microsoft Office 365 upgrade and 2) Data migration to SharePoint online not to exceed \$29,000, with such minor changes deemed necessary.

### POLICY CONSIDERATIONS

*The City Council is responsible for the budget. Although the contracts were not in the 2020 original budget, funding for the projects is included in CARES Act budget and the 2020 Budget Amendment approved by the City Council.*

### DESCRIPTION/BACKGROUND

The City recently contracted with SoftResources to perform an IT strategic plan. Two of the recommendations in the study included an upgrade to the City’s existing Microsoft Office Exchange server to Office 365 and migrating existing data on-premises server to SharePoint which is a “cloud” based system.

*Section 3.4 of the IT Strategic Plan: “Office productivity software includes word processing, spreadsheets, email and other office applications. The City is currently on Office 2013 which is now becoming dated. The City should consider migrating to Office 365 that includes Cloud versions of Word, Excel, PowerPoint, and other office productivity tools. This is in alignment with Microsoft’s current direction for Office and upgrades are automatically provided. Most companies and cities are using Microsoft Office 365 which is very standard in the industry. This move will bring the greatest benefit to a “work from home” environment that has been highlighted by the current COVID-19 conditions. This will allow employees with an internet connection to securely access their files from home and promote collaboration through tools such as Teams”.*

Scope of work for the Office 365 Migration includes the following tasks:

- Migrate all City of Monroe mailboxes (approximately 130) to Office 365 Government tenancy
- Configure distribution lists, shared mailboxes, group mailboxes
- Configure Advanced Threat Protections for email security
- Configure Microsoft Multi Factor Authenticator for all users
- Provide documentation for end users to setup MFA, access Office365 online
- Maintain on-premises backups of all Office365 data



# MONROE CITY COUNCIL

## *Agenda Bill No. 20-130*

### Key Project Deliverables:

- All City and Police mailboxes, distribution groups, and share mailboxes migrated to Office 365 Government GCC
- All accounts configured for multi-factor authentication with Microsoft Authenticator or other token-based system
- Antimalware/Antispam policies configured with Advanced Threat Protection
- On-premise backup of the Office365 environment with new Synology DiskStation using built in backup tools
- Current Exchange 2013 server retired

Project length:

8 weeks

Scope and Project Deliverables for Data Migration to SharePoint online.

### Project goals/objectives:

- Migrate existing folder and file structures to SharePoint after discovery and planning work to finalize scope
- Migrate existing user folders to OneDrive

### Key Project deliverables:

- All user folders migrated to Office365 / OneDrive
- Shared folders that are agreed to move during the Discovery phase are migrated to SharePoint document libraries
- All data will be backed up with on-premise Synology NAS using built in backup tools - The cost and associated labor is part of the Exchange to O365 Migration proposal.

Project length:

4 weeks

### **FISCAL IMPACTS**

- 1) Microsoft Office 365 upgrade cost \$17,183.71
- 2) Data migration to SharePoint online \$11,417.95

Both amounts will be paid for out of the CARES Act funding. Council previously allocated \$200,695.06 to Information Technology programs. There is approximately \$60,000 remaining in the funding set aside for Information Technology.

Projects included in the allocated amount are:

- Laptops for remote work
- IT support for remote work
- Fiber to City Hall
- Microsoft Office 365 upgrade (project management and licensing costs)
- Data migration to SharePoint
- Online Bill pay for Municipal Court
- Phone system upgrade to allow for remote work



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### **TIME CONSTRAINTS**

Project is estimated to take 8 to complete. Mayor and city staff recommend the City Council approve the contract with ISOutsource at this meeting to ensure CARES reimbursement dollars can be used for implementation and annual costs by October 31, 2020.

### **ALTERNATIVES**

City staff spoke with other entities about entering into an ILA to have their employee's complete this work but current workload and the City's timelines for completion did not make this possible. City staff is recommending IS Outsource due to their knowledge of the existing environment and ability to meet deadline.

Not approve the agreements and ask Mayor to provide direction to staff to find alternatives.

# Exchange to Office365 Migration

for:

## City of Monroe



August 12, 2020

Consultant: **Buddy Monroe, Tim Reynolds, Matt Simmons**

T: 800-240-2821



Seattle | Spokane | Phoenix | Portland

**Proprietary Information:** The enclosed material is proprietary to ISOsource and therefore copyrighted. This material is presented for the purpose of product evaluation and may not be disclosed in any manner to anyone other than the addressee and his/her employer.

# Project Information

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|                                  |   |
|----------------------------------|---|
| <b>Client Name:</b>              | City of Monroe  |
| <b>Project Name:</b>             | Exchange and File Server Migration to Office365   |
| <b>Project Sponsor:</b>          | Ben Warthan   |
| <b>Project Lead:</b>             | Matt Simmons  |
| <b>Team Member(s):</b>           | Tim Reynolds, Buddy Monroe, Sean O'Neill  |
| <b>Project goals/objectives:</b> | <ul style="list-style-type: none"><li>• Migrate all City of Monroe mailboxes (approximately 130) to Office 365 Government tenancy</li><li>• Configure distribution lists, shared mailboxes, group mailboxes</li><li>• Configure Advanced Threat Protections for email security</li><li>• Configure Microsoft Multi Factor Authenticator for all users</li><li>• Provide documentation for end users to setup MFA, access Office365 online</li><li>• Maintain on-premises backups of all Office365 data</li></ul>                                |
| <b>Project description:</b>      | <p>The City of Monroe is seeking to migrate its email services to Office365 to better serve its remote working staff during the current COVID-19 pandemic</p>   |
| <b>Key project deliverables:</b> | <ul style="list-style-type: none"><li>• All City and Police mailboxes, distribution groups, and share mailboxes migrated to Office 365 Government GCC</li><li>• All accounts configured for multi-factor authentication with Microsoft Authenticator or other token-based system</li><li>• Antimalware/Antispam policies configured with Advanced Threat Protection</li><li>• On-premise backup of the Office365 environment with new Synology DiskStation using built in backup tools</li><li>• Current Exchange 2013 server retired</li></ul> |
| <b>High-level assumptions:</b>   | <ul style="list-style-type: none"><li>• Office 365 Government GCC environment - mix of G1 and G3 licensing</li><li>• City of Monroe IT staff will assist with installing/upgrading Office software on workstations</li><li>• No existing offline email archives will be in scope for this project</li></ul>   |
| <b>High-level constraints:</b>   | <ul style="list-style-type: none"><li>• Procurement of Government tenancy can take weeks to complete</li><li>• Project to be completed by October 31st, 2020</li><li>• Migration schedule could be affected by bandwidth limitations</li></ul>  |
| <b>High-level risks:</b>         | Project could run past deadline due to procurement delays, bandwidth limitations or City of Monroe staff availability   |
| <b>Project length:</b>           | 8 weeks   |

# Project Scope and Labor Estimate Proposal

The table below provides an estimate of project labor costs.

| Phase                   | Milestone | Deliverable  | Hours        | Cost               |
|-------------------------|-----------|--|--------------|--------------------|
| Planning                | 1         | Project Management   | 6.00         | \$1,386.00         |
| Execution               | 2         | Discovery & Planning - Exchange                            | 3.00         | \$552.00           |
| Execution               | 3         | Office365 Setup  | 8.00         | \$1,664.00         |
| Execution               | 4         | Configure Advanced Threat Protection                       | 4.00         | \$736.00           |
| Execution               | 5         | Configure Multi Factor Authentication                      | 4.00         | \$736.00           |
| Execution               | 6         | Setup Synology NAS for O365 Backup                         | 4.00         | \$736.00           |
| Execution               | 7         | Exchange Migration   | 31.00        | \$5,750.00         |
| Execution               | 8         | Setup email relay for copiers/programs with email function | 6.00         | \$1,104.00         |
| Execution               | 9         | Post Migration Support                                     | 16.00        | \$2,448.00         |
| Completion              | 10        | Project Wrap-up and Completion                             | 3.00         | \$624.00           |
| <b>Project Subtotal</b> |           |  | <b>85.00</b> | <b>\$15,736.00</b> |

**Tax Rate: 9.20%     \$1,447.71**  
**Project Total:             \$17,183.71**

## Project Selection and Payment Options

| Payment Terms - City of Monroe  |   |
|---|---|
| <input type="checkbox"/>  | \$16270 Block of Support with a \$10 per hour discount (payment due before start) |
| <input type="checkbox"/>  | \$0 Deposit (payment due before start) and Progress Invoice Net 15 Terms          |
| <b>Customer Name</b>  | _____   |
| <b>Customer Signature</b>   | _____   |
| <b>Date</b>   | _____   |
| <i>Client: City of Monroe; Project: Exchange Migration to Office365</i> |   |

**\*\*This is an estimate only, and will be billed for the actual time required to complete the project. \*\***

## Recommended Hardware and Software Solutions

At ISOutsource, we do not sell hardware direct to our clients. We make recommendations and source the product from reputable and competitively priced vendors like CDW, Insight, Dell and Zones.

We have established relationships with vendors that take advantage of the pooled buying power of our clients to receive discounted pricing. We receive no rebate or commission on hardware sales. This enables us to maintain an objective point of view. Our recommendations are based on best practices and our cumulative experience of what works in a small business environment—not whatever we are licensed to sell.

For your convenience we have asked one of our vendors for estimates to give you an idea of what to plan for with regard to your hardware costs. These are estimates only.

### Hardware/Software One-Time

| Item  | Quantity | Price    | Total             |
|---|----------|----------|-------------------|
| Synology DiskStation dS1618+ NAS            | 1        | \$879.99 | \$879.99          |
| WD Red Hard Drives - 4TB each - 12TB usable | 4        | \$117.99 | \$471.96          |
| <b>Total</b>                                |          |          | <b>\$1,351.95</b> |

### Software Monthly

| Item         | Quantity | Price | Total         |
|--------------|----------|-------|---------------|
|              |          |       |               |
| <b>Total</b> |          |       | <b>\$0.00</b> |

### Software Annually

| Item  | Quantity | Price    | Total              |
|---|----------|----------|--------------------|
| Office365 Government G3 GCC - Billed monthly, annual cost shown | 115      | \$240.00 | \$27,600.00        |
| Office365 Government G1 GCC - Billed monthly, annual cost shown | 15       | \$96.00  | \$1,440.00         |
| <b>Total</b>  |          |          | <b>\$29,040.00</b> |

# Getting Started

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Please complete and return the attached:

- Project Scope and Labor Estimate Proposal (above)
- Payment Options (above)

Once completed and return to one of the options below:

- Fax to: 425-420-9003
- Email to: [Projects@isoutsource.com](mailto:Projects@isoutsource.com)



# 2020 Schedule of Rates

## SERVICES

| Work Role Resource                          | Hourly Rate* |
|---|--------------|
| Support Tech / Field Tech                   | \$153        |
| Consultant / Systems Engineer               | \$184        |
| Senior Consultant / Senior Systems Engineer | \$208        |
| Managing Consultant / Solution Architect    | \$231        |
| vCIO / CIO Services / Principal Roles       | \$262        |

\*Rate Discounts Available via our Prepaid Block of Support Program (see below)

## BUSINESS HOURS

| Work Type       | Time of Day                               | Rate Adjustment |
|-----------------|---|-----------------|
| Regular Weekday | 6am – 6pm, Mon – Fri (excluding holidays) | 1x              |
| Evening Weekday | 6pm – 6am, Mon – Fri (excluding holidays) | 1.25x           |
| Weekend         | 6pm Fri – 6am Mon                         | 1.5x            |
| Company Holiday | Entire Day                                | 1.5x            |

## BLOCK OF SUPPORT

Purchasing a Prepaid Block of Support (BOS) discounts the Hourly Rate by \$10 per hour. The size of the BOS is based on your monthly IT Support Plan and budget. Your real time BOS balance can be accessed at any time via our Customer Portal. The BOS size is reviewed quarterly to ensure that it is in sync with your budgeted level of service provided monthly.

## NOTE

- After hours rates apply.
- All time billed in blocks of one-tenth of an hour.
- Travel time is billed door to door.
- There are no additional charges for parking and mileage.
- Rates exclude applicable state and local sales tax.

# 2020 Schedule of Rates

## REMOTE MONITORING & MANAGEMENT

| Product                                     | Instance Rate |
|---|---------------|
| Server Remote Monitoring & Management + AV  | \$30/mo       |
| Network Monitoring and Management           | \$10/mo       |
| Desktop Remote Monitoring & Management + AV | \$6/mo        |
| AV License Only                             | \$3/mo        |

## PACKAGED SERVICE

| Product                                   | Instance Rate          |
|---|------------------------|
| Server Health Check                       | \$100                  |
| External ASV PCI Scan (up to 2 IPs)       | \$150 (+\$20 add'l IP) |
| iVSAT Setup & Deployment                  | \$250                  |
| iVSAT Unlimited Internal & External Scans | \$50/mo                |
| Netwrix Auditor                           | \$4/user               |

## SCRIPTED REMEDIATION

| Product  | Hourly Rate |
|--|-------------|
| Scripted Issue Remediation (billed in 1-minute increments) | \$149       |

## SECURITY & STRATEGIC SERVICES

| Offering                                       | Scope / Costs |
|--|---------------|
| Penetration Testing                            | Contact Us    |
| Vulnerability Assessment                       | Contact Us    |
| Security Awareness Training                    | Contact Us    |
| Business and Technology Assessment Plan (BTAP) | Contact Us    |

## NOTE

- Services offered and availability subject to change.
- Rates exclude applicable state and local sales tax.

# About ISOutsource

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At ISOutsource, our mission is to provide outsourced technology support and technology consulting services that leave you feeling happy, productive and supported. We strive to achieve the highest standards of professionalism and customer service.

Formed in 1992, we have decades of experience in assisting businesses like yours to maximize the return on their investment in technology.

ISOutsource has over 500 active clients.

Current clients include: Mahlum Architects, Gallatin Public Affairs, Berntson Porter & Company, City of Everett, City of Monroe, Tully's, Theo Chocolates, Erickson & McGovern Architects, Solutions IQ, CU Business Group, The Museum of History and Industry (MOHAI) and many more.

ISOutsource holds the rare distinction of being a Microsoft Gold Partner and an Amazon Web Services Consulting Partner. This ensures our clients the highest level of service, whether supporting their Windows servers and workstations or helping them transition to cloud-based solutions.

Nominated as one of Washington's Best Places to work by the Puget Sound Business Journal, we currently employ over 70 people and we are growing steadily. Our technical staff consists of nearly 60 consultants, systems engineers, support techs, project managers, solutions architects and technology directors. Sales, administration and management positions account for the remaining positions within the company.

Because stability matters, we want you to know that you are choosing a partner that continues to experience consistent growth, paired with profitability and remains cash positive.

ISOutsource's corporate headquarters are located in Bothell, Washington, with additional offices located in Seattle, Spokane, Phoenix and Portland. We serve clients with offices all over the world; however, most are owned and operated in the Western United States.

"ISOutsource has been a highly competent and trusted partner for us. They provide not only the strategic insight into how technology can help our business but are there on a regular basis to keep us running at top speed at a cost that is less than we would spend bringing it in house"

Anne Lawler, Managing Member  
Jameson, Babbitt Stites & Lombard  
PLLC

ISOutsource client since 1998



## Microsoft Partner

Gold Server Platform  
Gold Devices and Deployment  
Gold Midmarket Solution Provider  
Cloud Accelerate

# Internal Controls

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At ISOutsource, we make a concerted effort to implement effective internal controls within our infrastructure, applications, operations and people to protect our clients' data and ensure business continuity. The following list highlights some of our mechanisms, policies and processes:

## Physical security

- ☑ Key cards control access to all of our facilities and provide an access audit trail.
- ☑ Physical equipment including server and network assets are locked with restricted access.
- ☑ Service bench and build rooms are locked when not occupied.
- ☑ Sensitive printed materials are stored in locked file cabinets.

## Human Resource Policy

- ☑ Background checks including criminal, employment, education, and credit are performed on all personnel as part of the hiring process.
- ☑ Formal exit procedures take place when employment is terminated to ensure revocation of privileges and physical access.

## Logical Controls

- ☑ Client passwords are stored within an encrypted logical password vault, which restricts access and logs requests for auditing purposes.
- ☑ User accounts are not shared.
- ☑ Strong passwords are enforced within all ISOutsource information systems.
- ☑ Data is backed up several times per day.
- ☑ Critical data is encrypted before transmittal to geographically dispersed data centers as part of the backup and disaster recovery process.
- ☑ Access to critical applications like accounting applications and our customer database is limited and requires standard authentication with multifactor authentication enforced.
- ☑ All internet facing applications are secured with TLS 1.1 or greater session encryption.

## Procedures

- ☑ Servers and workstations are monitored 24/7.
- ☑ All workstations, laptops and servers receive automated operating system and application patching. All servers are patched weekly and workstations nightly upon the approval of released patches.
- ☑ Vulnerability assessments are performed on a regular basis to test the perimeter and inside of the network against thousands of known vulnerabilities.
- ☑ Enterprise grade antivirus and host intrusion prevention systems are installed on all servers and workstations.

## Disaster recovery and Business Continuity

- ☑ Distributed offices, distributed workforce.
- ☑ Backup and disaster recovery service enables virtualization of failed servers within minutes.
- ☑ Sufficient measures are in place to ensure access to power, IT infrastructure (servers and workstations), communications (phone and internet) and even office space within 48 hours of a disaster.

# Data Migration to SharePoint Online

for:

## City of Monroe



August 12, 2020

Consultant: **Buddy Monroe, Tim Reynolds, Matt Simmons**

T: 800-240-2821



Seattle | Spokane | Phoenix | Portland

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# Project Information

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|                                  |   |
|----------------------------------|---|
| <b>Client Name:</b>              | <b>City of Monroe</b>   |
| <b>Project Name:</b>             | Data Migration to SharePoint Online   |
| <b>Project Sponsor:</b>          | Ben Warthan   |
| <b>Project Lead:</b>             | Buddy Monroe  |
| <b>Team Member(s):</b>           | Matt Simmons, Tim Reynolds, Sean O'Neill  |
| <b>Project goals/objectives:</b> | <ul style="list-style-type: none"><li>• Migrate existing folder and file structures to SharePoint after discovery and planning work to finalize scope</li><li>• Migrate existing user folders to OneDrive</li></ul>   |
| <b>Project description:</b>      | The City of Monroe is seeking to migrate its current user folders and shared folders to Office365 to better serve its remote working staff during the current COVID-19 pandemic   |
| <b>Key project deliverables:</b> | <ul style="list-style-type: none"><li>• All user folders migrated to Office365 / OneDrive</li><li>• Shared folders that are agreed to move during the Discovery phase are migrated to SharePoint document libraries</li><li>• All data will be backed up with on-premise Synology NAS using built in backup tools - The cost and associated labor is part of the Exchange to O365 Migration proposal</li></ul>  |
| <b>High-level assumptions:</b>   | <ul style="list-style-type: none"><li>• Discovery work must be conducted to finalize this project scope – <b>this is a rough estimate only</b></li><li>• Workstations requiring sync will be on a supported Windows 10 release (v1709 or greater)</li><li>• If data limits are exceeded, client understands the cost of purchasing additional storage space (see page 5)</li><li>• Client understands the limitations of file storage in SharePoint and OneDrive sync</li></ul> |
| <b>High-level constraints:</b>   | <ul style="list-style-type: none"><li>• The first portion of this project includes discovery. Depending on what is surfaced during the process, the project time could increase or become a non-starter due to limitations in the SharePoint platform</li><li>• Project budget estimated on migrating all user folders, 2TB of shared folders from the City file server(s)</li></ul>  |
| <b>High-level risks:</b>         | <ul style="list-style-type: none"><li>• When cutting over to SharePoint there could be issues that arise and need to be resolved, resulting in some loss of productivity for the duration</li></ul>   |
| <b>Project length:</b>           | 4 weeks   |

# Project Scope and Labor Estimate Proposal

| Phase                   | Milestone | Deliverable                       | Hours        | Cost               |
|-------------------------|-----------|-----------------------------------|--------------|--------------------|
| Planning                | 1         | Project Management                | 4.00         | \$924.00           |
| Execution               | 2         | Discovery & Planning - SharePoint | 8.00         | \$1,664.00         |
| Execution               | 3         | Buildout                          | 4.00         | \$832.00           |
| Execution               | 4         | Migration - OneDrive              | 6.00         | \$1,248.00         |
| Execution               | 5         | Migration - SharePoint            | 14.00        | \$2,912.00         |
| Execution               | 6         | Post Migration Support            | 12.00        | \$1,836.00         |
| Completion              | 7         | Training and Documentation        | 5.00         | \$1,040.00         |
| <b>Project Subtotal</b> |           |                                   | <b>53.00</b> | <b>\$10,456.00</b> |

**Tax Rate: 9.20% \$961.95**  
**Project Total: \$11,417.95**

## Project Selection and Payment Options

| Payment Terms - City of Monroe  |  |
|---|--|
| <input type="checkbox"/>  | \$10,900 Block of Support with a \$10 per hour discount (payment due before start) |
| <input type="checkbox"/>  | \$0 Deposit (payment due before start) and Progress Invoice Net 15 Terms           |
| <b>Customer Name</b>  | _____  |
| <b>Customer Signature</b>   | _____  |
| <b>Date</b>   | _____  |
| <i>Client: City of Monroe; Project: Data Migration to SharePoint Online</i> |  |

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For your convenience we have asked one of our vendors for estimates to give you an idea of what to plan for your hardware costs. These are estimates only.

## Software Cost - Annual

| Item   | Quantity | Price  | Total             |
|--|----------|--------|-------------------|
| Additional Storage - \$0.20 per 1GB, per month | 1000     | \$2.40 | \$2,400.00        |
| <b>Total</b>                                   |          |        | <b>\$2,400.00</b> |

\*\*\*Please note that Office365 subscription costs apply but are not show above. Additionally, the recommend backup solution is not included in this project. Please refer to the Exchange to Office365 Migration proposal for those costs

# Getting Started

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# 2020 Schedule of Rates

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| AV License Only                             | \$3/mo        |

## PACKAGED SERVICE

| Product                                   | Instance Rate          |
|---|------------------------|
| Server Health Check                       | \$100                  |
| External ASV PCI Scan (up to 2 IPs)       | \$150 (+\$20 add'l IP) |
| iVSAT Setup & Deployment                  | \$250                  |
| iVSAT Unlimited Internal & External Scans | \$50/mo                |
| Netwrix Auditor                           | \$4/user               |

## SCRIPTED REMEDIATION

| Product  | Hourly Rate |
|--|-------------|
| Scripted Issue Remediation (billed in 1-minute increments) | \$149       |

## SECURITY & STRATEGIC SERVICES

| Offering                                       | Scope / Costs |
|--|---------------|
| Penetration Testing                            | Contact Us    |
| Vulnerability Assessment                       | Contact Us    |
| Security Awareness Training                    | Contact Us    |
| Business and Technology Assessment Plan (BTAP) | Contact Us    |

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ISOutsource holds the rare distinction of being a Microsoft Gold Partner and an Amazon Web Services Consulting Partner. This ensures our clients the highest level of service, whether supporting their Windows servers and workstations or helping them transition to cloud-based solutions.

Nominated as one of Washington's Best Places to work by the Puget Sound Business Journal, we currently employ over 70 people and we are growing steadily. Our technical staff consists of nearly 60 consultants, systems engineers, support techs, project managers, solutions architects and technology directors. Sales, administration and management positions account for the remaining positions within the company.

Because stability matters, we want you to know that you are choosing a partner that continues to experience consistent growth, paired with profitability and remains cash positive.

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"ISOutsource has been a highly competent and trusted partner for us. They provide not only the strategic insight into how technology can help our business but are there on a regular basis to keep us running at top speed at a cost that is less than we would spend bringing it in house"

Anne Lawler, Managing Member  
Jameson, Babbitt Stites & Lombard  
PLLC

ISOutsource client since 1998



## Microsoft Partner

Gold Server Platform  
Gold Devices and Deployment  
Gold Midmarket Solution Provider  
Cloud Accelerate

# Internal Controls

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At ISOutsource, we make a concerted effort to implement effective internal controls within our infrastructure, applications, operations and people to protect our clients' data and ensure business continuity. The following list highlights some of our mechanisms, policies and processes:

## Physical security

- ☑ Key cards control access to all of our facilities and provide an access audit trail.
- ☑ Physical equipment including server and network assets are locked with restricted access.
- ☑ Service bench and build rooms are locked when not occupied.
- ☑ Sensitive printed materials are stored in locked file cabinets.

## Human Resource Policy

- ☑ Background checks including criminal, employment, education, and credit are performed on all personnel as part of the hiring process.
- ☑ Formal exit procedures take place when employment is terminated to ensure revocation of privileges and physical access.

## Logical Controls

- ☑ Client passwords are stored within an encrypted logical password vault, which restricts access and logs requests for auditing purposes.
- ☑ User accounts are not shared.
- ☑ Strong passwords are enforced within all ISOutsource information systems.
- ☑ Data is backed up several times per day.
- ☑ Critical data is encrypted before transmittal to geographically dispersed data centers as part of the backup and disaster recovery process.
- ☑ Access to critical applications like accounting applications and our customer database is limited and requires standard authentication with multifactor authentication enforced.
- ☑ All internet facing applications are secured with TLS 1.1 or greater session encryption.

## Procedures

- ☑ Servers and workstations are monitored 24/7.
- ☑ All workstations, laptops and servers receive automated operating system and application patching. All servers are patched weekly and workstations nightly upon the approval of released patches.
- ☑ Vulnerability assessments are performed on a regular basis to test the perimeter and inside of the network against thousands of known vulnerabilities.
- ☑ Enterprise grade antivirus and host intrusion prevention systems are installed on all servers and workstations.

## Disaster recovery and Business Continuity

- ☑ Distributed offices, distributed workforce.
- ☑ Backup and disaster recovery service enables virtualization of failed servers within minutes.
- ☑ Sufficient measures are in place to ensure access to power, IT infrastructure (servers and workstations), communications (phone and internet) and even office space within 48 hours of a disaster.