



BELLWETHER

JEFFERSON PARISH DEPT OF PURCHASING

RFP No. 0464: To Provide Information Technology Services and Supplemental Staffing for the Departments for Electronic Information Systems (EIS) and Telecommunications

Submitted to:

Jefferson Parish Department of Purchasing
200 Derbigny Street, Suite 4400
Gretna, LA 70053
(504) 364-2678

Receipt Date & Time:

August 25, 2023 @ 3:30PM
Electronic Submission

Submitted by:

Bellwether Technology Corporation

4423 LaSalle Street
New Orleans, LA 70115
504-588-2001
Federal Tax Identification Number: 72-1073257

POC: Merrick Sloss, President

4423 LaSalle Street
New Orleans, LA 70115
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msloss@belltec.com



Introduction

Thank you for allowing us to show you what's possible when your operations, people, and goals are supported by Bellwether Technology Support services. In the proposal that follows, you will learn about this model and how you can leverage technology in ways that have previously been out of reach.

Our work to provide comprehensive IT services includes getting to know your business and your processes, while developing a relationship between our teams that feels more like a partnership than a contractual arrangement. In fact, we think you'll find that because we're so easy to work with and so devoted to helping you achieve your goals, you'll soon consider us an extension of your team.

Our goal is to highlight our wide-ranging expertise and experience to emphasize that we can meet all the specific needs of the Parish as outlined in the Scope of Work. We aim to change the experience that you have with technology so that instead of being just a necessary tool, our IT services will become a strategic driver for your success.

With appreciation,

Merrick Sloss
President

Merrick Sloss

A. Executive Summary/Cover Letter

Bellwether Technology Corporation has the experience and desire to be selected to provide Information Technology Support Services and Supplemental Services to Jefferson Parish. Bellwether is willing to perform those services outlined in the RFP and willing to negotiate a contract with the Parish. If awarded as an IT Support and Supplemental Services provider, Bellwether would work to relieve and augment the Jefferson Parish technology management team of the tremendous amount of work involved in administrating and maintaining technology support. This increase in efficiency will also reduce support costs and increase Parish employee satisfaction and efficiency.

In addition to providing supplemental staffing, Bellwether will provide as-needed technical assistance for existing hardware and software, strategic planning, product acquisitions, special projects, and any other technology-based support. As with all of our clients, Bellwether is committed to working with Jefferson Parish to be the Parish's partner in introducing new efficiencies and innovation as technology evolves to enhance the overall operation of the Parish.

Bellwether agrees to meet all aspects of compliance outlined in this RFP. Throughout this proposal, Bellwether will display that our unique approach to IT Support Services is built on three unique pillars that best exemplify our values:

- (1) People First: We want your team and our employees to have a great experience in every interaction.
- (2) A Step Ahead: We are forward-thinking people, committed to using technology to both prevent and solve problems.
- (3) Specialized Teams: IT is complex and evolving all the time, so we have people dedicated to each area of IT expertise.

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C. TECHNICAL PROPOSAL ELEMENTS

What Services Are Available?

Bellwether confirms it is qualified to support, maintain, and enhance all technology systems, services, and applications in use by Jefferson Parish and listed in the Scope of Services. Bellwether uses its own staff to service the needs of all clients, with no subcontracting involved. Please refer to the proposed Jefferson Parish team outlined later in this proposal.

Service	Availability?	Notes
vCIO Strategic Business and Technology Consulting	Available	We do not put any caps on hours, meeting rhythm or time our vCIO spends helping your business with your technology needs. Onsite or remote, it is all included. Do you need your vCIO to present at a board meeting, your executive meeting, or even help run your technology steering committee? No problem that is all included.
Technical Support Incidents, Requests, and Problem Management	Available	24x7x365, onsite or remote, your Service Team is available to help with any incident or work stoppage that may arise. Any of your staff can submit tickets. Is your Internet down? Call us and we will work with your ISP to restore services. Line of Business crashed? Call us and make us work with your application vendor.
NOC Network Operations Center Proactive Management	Available	We include unlimited proactive support as part of our commitment to you. We also include all the tools our teams require to manage your network. These tools include Anti-Virus/Anti-Malware, management of Windows and standard 3rd party Patching, Monitoring, Asset Tracking, and alerting.
Restoration of Service	Available	In the event of system failure, on-premises or cloud-based, we cover the labor for repair. We do not cover parts or costs from third parties.
Basic Implementation Tasks i.e., New PC Deployments	Available	The following basic implementation is part of your plan: New PC, Laptop or iDevice, Printers, Office, Adobe, and more.
Larger Implementation	Available as Needed	Implementation of new technologies is sited, if needed, in your agreement. Examples include the following items: Migration to Azure, Physical office move, the primary line of business application deployments or upgrades, or implementation of new servers. These items are a regular part of your business's strategic roadmap.
Backups Monitoring and Management	Available	Although we do not include the hardware, software, or cloud storage as part of our agreement, we do cover all the labor and tools for central management and monitoring when the backup technology matches our service catalog stack. We include unlimited labor for troubleshooting and restoration of services due to data failure.
Networking: Firewalls, Switches & Access Points	Available	Although we do not include the hardware for firewalls, access points and switches we included unlimited labor for their management and monitoring. The level of control varies based on the technology deployed. For clients on our technology stack, we cover the most robust level of supervision.

Cloud Services: Microsoft 365 & Azure Management, oversight, and education	Available	We provide centralized management of the 365 suite and most Azure services in our NOC. Furthermore, your network Administrator and vCIO will make recommendations and manage to best practices. When primary user or management training is required, we include that labor as well.
Asset Inventory Management	Available	Through advanced automation systems, we perform daily audits of your network and record agent-based devices, application, and hardware details.
Hardware, Cloud & Software Licensing Controls	Available	For hardware, software, cloud services, SSL and other services procured through Bellwether, we oversee automatic renewals of these services. Working with your business to ensure an outage event doesn't occur due to a failed product or warranty renewal.
Lifecycle Management	Available	Your vCIO will use the data gathered through our inventory management system and other controls to provide your business with a strategic plan to manage equipment before it hits the end of life. Providing annual budgets for projected technology spend.
Printer or Multifunction Printer Problems	Available	Call your dedicated Service team. We have to ensure the network is up and operational. In the event of a printer hardware failure, we collaborate with the company who services your printer, or if needed, we recommend a replacement unit.
Phone Systems Issues	Available as Needed	We do not service phone systems themselves, however, given most phones are VOIP and run over the corporate network or internet, we include the labor to ensuring your network is functional and work with your phone system vendor.
Staff Remote Issues Home, Hotel, and more	Available as Needed	We will collaborate with your staff to ensure that the corporate side of the network is functional. We, unfortunately, cannot include your staff home network or device. As part of good user experience, we do our best to make a recommendation to your staff for those repairs (i.e., If the issue is a home internet outage, we politely direct the user to call Cox).
Line of Business Application Support	Available	We collaborate with your staff and other application vendors to ensure your business applications are running and staff can access them up to the point of login. We, unfortunately, cannot own in-depth troubleshooting, data manipulation or access your data within the myriad of applications our clients' businesses use. We always recommend support contracts with critical application vendors to allow your dedicated service team to warm hand off support to the given application vendor.
Security Incident or Breach	Incident Response Included as Needed	Our goal is to protect your data, including Cyber Threats. The reality is that the prevention of a security incident cannot always occur. Should an event occur, we will follow our documented Incident Response process, documenting the threat and restoring service. A breach response may be necessary if we determine you have compliance notification requirements and extract confidential data from your systems.

D. PROPOSER QUALIFICATIONS & EXPERIENCE

About Bellwether Technology Corporation (Background)

Founded in 1980

In an industry that requires frequent and substantial evolution, Bellwether has maintained its position as the region’s industry leader since inception as a ComputerLand franchise in 1980. In the early 2000s, Bellwether was started by Poco Sloss, our current CEO, as a computer retailer and transitioned into a Managed Service Provider (MSP). Since then, we have helped many businesses and organizations in the Gulf South Area align technology with their business goals.

Long-term Partnerships in a Variety of Industries

Bellwether is headquartered in the Central Business District in New Orleans, LA. We have enjoyed long-term partnerships across all industries, some of which include financial services, legal, construction, health care, state and local governments, energy, real estate, marketing, and non-profits – to name a few. As a result, we have robust experience working in a multitude of different IT environments and business settings.

Business Improvement with EOS

Bellwether is an EOS (Entrepreneurial Operating System) company. EOS promotes company-wide communication and accountability through a rigid framework and various processes. EOS enables Bellwether to optimize our service delivery and operate at the highest level.

People First, A Step Ahead, Specialized Teams

Through our experience, we understand there is no “one-size-fits-all” approach to technology solutions. We rely on our deep roster of 60+ industry professionals to engineer a custom solution for your business requirements. Our extensive bench of IT professionals, with specific job functions, allows us to proactively identify potential issues before they degrade business functions. Bellwether believes that our team is an extension of your team.

Industry Leader

Bellwether has been a nationwide leader in the MSP space, going on for almost a decade. Our experience, expertise, and knowledgeable staff have been recognized by CRN, an IT industry news and research company.



CRN’s MSP 500 list identifies the market’s key managed services players who are setting themselves apart with best-of-breed solutions that provide business outcomes customers need.

Written Letters of Reference (Copies located in Appendix)

Please refer to the lists below for the points of contact who can attest to Bellwether's ability to meet or exceed the requirements outlined by the Parish in this RFP. Bellwether invites the Parish to contact these references at any time to confirm Bellwether's stellar work record. In addition to the letters of reference, please refer to the Appendix, which includes ten current projects similar to the services outlined in the RFP.

- 1. Thomas Lewis (Gallo Mechanical, LLC)**
 - a. T: (504) 944-6736
 - b. E: thomasl@gallomech.com

- 2. Scott Watson (Hancock Whitney Bank)**
 - a. T: (228) 539-8779
 - b. E: Scott.Watson@hancockwhitney.com

- 3. Nick Gwyn (Passages Hospice, LLC)**
 - a. T: (504) 628-3170
 - b. E: nick@passages-hospice.com

Past Work Performance with Jefferson Parish

Bellwether has recently revamped our government contracting department, so we do not have any past work performance with Jefferson Parish to reference at this time; but Bellwether recently successfully bid on Jefferson Parish School's RFP #3322 (Technology Support Services). Bellwether expects to begin working with JPS this Fall for the new 2023-24 school year. Outside of Bellwether's work with JPS, Bellwether supports a number of clients with headquarters and other major auxiliary locations within Jefferson Parish. These clients include large local companies such as Hancock Whitney, Passages Hospice, and Longbranch Healthcare.

Other Major Managed IT Service Clients to Reference

- 1. Holland Counce (Longbranch Healthcare, LLC)**
 - a. T: (504) 250-5283
 - b. E: hollandc@longbranchhealthcare.com

- 2. Stephanie Steib (St. Charles Parish School Board)**
 - a. T: (985) 785-3126
 - b. E: ssteib@stcharles.k12.la.us

- 3. Dean Basse (Burghardt Insurance)**
 - a. dbasse@burghardt.com

E. Our Approach & Methodology (Innovative Concepts)

Our approach to technology management is both proactive and reactive. We use industry best practices and proprietary processes to keep your IT systems humming along. We will address potential issues before they become big problems. When hiccups happen or your people need help, you will get a fast response. You will also get the strategic guidance you need to make sure that you're adopting the right technology.

What's more, your success is our success. As the IT function of your business goes from noisy to quiet, you'll forget that there's a whole team working behind the scenes to make your technology experience seamless and provide fuel for your forward progress.

Our approach to Technology Support services is built on three pillars that exemplify our values.

People First

We want your people and our employees to have a great experience in every interaction. Our staff to client ratio is better than the industry average in order to make sure that we have ample staff to respond when your employees need help.

It won't take long for us all to get on a first-name basis, and that's when you'll discover that our IT professionals are just as skilled at communications and relationship-building as they are with technology.

A Step Ahead

We're forward-thinking people, committed to using technology to both prevent and solve problems. You can expect to become freed from the issues that have previously been unfixable. Going forward, you're not going to see everything we do to prevent problems from happening, but you *will* notice the difference in how smoothly your technology runs compared to what you were used to.

Any successful business must effectively manage modern cyber threats and you can be confident that you're standing up a strong cyber defense with Bellwether because our cybersecurity experts will make sure that your security strategy is current.

When it comes to using technology as a competitive advantage, you can expect your investments in innovative technologies like the cloud to bring tangible results because you get the IT guidance and expertise needed to choose and implement the right technologies.

Specialized Teams

IT is complex and evolving all the time, so we have people dedicated to each area of IT expertise including cybersecurity. You get access to all the specialties that make up a comprehensive outsourced IT department, up to date with the latest developments in technology.

The IT professionals that you'll have working on your behalf every day bring their knowledge and skills together in collaboration. We honor and acknowledge how different personalities and individual strengths contribute to team success whether it's bringing in a project on time and within budget or sharing knowledge with thorough documentation.

Information Technology Hurricane Preparedness Service Plan (Disaster Recovery Planning)

Data Backup and Technology Planning to Help You Bounce Back After a Disaster

Resilience is the Key to Business Continuity

A disaster recovery plan isn't insurance for everything bad that can happen to your business. But if you want to bounce back when your business meets unfortunate circumstances, having a disaster recovery plan can mean the difference between business continuity or business failure.

What's a Disaster Recovery Plan?

Imagine what would happen to your business operations if a fire burned down your building, or a water pipe broke and flooded your facility. What if power and internet were down because of a hurricane? What if you were the victim of a cyber-attack? What if an employee accidentally deleted all of your customer information?

A disaster recovery plan requires you to think ahead and figure out what you're going to do to resume operations when your technology (or your whole business) goes down or you have a data loss situation.

A vital component of a disaster recovery plan is data backup, and there are different factors that come into play when you're creating your plan including the following points of interest:

- The total number of hardware and software assets that you have.
- The priorities that you set for business functions and associated data.
- How long you can afford to be without your data and IT systems.
- The potential risks that your organization faces.
- The budget you're willing to allocate to your plan.

Our Approach to Disaster Recovery Planning

We provide disaster recovery planning for clients through our Bellwether Managed IT framework. We consult with clients to first help them understand the implications of unexpected downtime to their business if and when their systems go dark, and then create an action plan that allows them to get back up and running.

The key points in our disaster recovery consultations include the following items:

- **Recovery Time Objective**
 - Length of time that you can be down after a disaster.
- **Recovery Point Objective**
 - Amount of lost data that can be tolerated.
- **On and Offsite Backups**
 - Where and how data will be backed up.
- **Budget**
 - Monetary parameters for the plan.

F. Proposed Transition Plan (Plan, Schedule, & Proposed Team)

Bellwether Technology Support Services make it possible for you to be strategic with your use of technology so that you can move your business forward. When you're strategic, you can focus IT resources on your goals, improve how you manage risks, and plan and budget for the future – all while giving employees and customers the technology experience they crave.

These outcomes are delivered through four distinct areas of service that include **proactive** services to prevent issues from becoming big problems, and **reactive** services to get your people help when they need it.

Support

When you call us, someone is going to answer who can help you.

Bellwether's service desk is intentionally over-staffed with a ratio of technicians-to-end users well above the industry average. The service desk is fully staffed 12 hours per day (7:00 AM to 7:00 PM) Monday through Friday. Additionally, we have a resource on call outside of normal operating hours 24x7x365 to attend to emergency requests. All support technicians have CompTIA A+ or higher certifications, we do not have receptionists routing tickets – when you call, someone that can solve your problems will answer to assist you.

Typically, our service desk can resolve 95% of service requests remotely. However, should the need arise for an on-site resource, one will be dispatched to your office coordinating with your point of contact at your convenience.

You don't have to take to our word for how responsive we are. Here's what our clients say –



"I feel very fortunate to get such quick attention. Thank you."



"As always, excellent service and friendly techs."

Cybersecurity

Cyber risks are effectively managed with a multi-layered security strategy.

We have a Security Operations Center (SOC) staffed locally by people who are certified experts in cybersecurity. The cyber threat landscape is constantly evolving but you can be confident that you won't get left behind when it comes to new threats and the defenses needed to thwart them.

Our security strategy is layered with multiple technical and non-technical tactics that provide a **baseline** for security. Depending on your business and industry, we may recommend additional advanced security tactics that will help you meet needs for regulatory compliance or your individual risk tolerance.

No Bellwether client following our recommendations has experienced a data breach.

Management

Proactive IT management prevents problems and creates predictable technology.

Proactive IT management is paramount to a seamless technology experience. Ideally, we root out issues before anyone in your organization is aware. You may not hear much from the proactive team but rest assured, they are diligently working behind the scenes to keep your technology humming along.

Bellwether's proactive team leverages an evolving set of best-in-class tools to monitor and manage your IT environment. The proactive team builds alerting processes, customized to your IT infrastructure, to identify issues before they impact your people or IT systems. Bellwether's proactive team manages and remediates alerts on a 24x7x365 basis.

IT Strategy

Plan and budget for the future and use technology to meet your business goals.

We provide IT guidance through a vCIO (Virtual Chief Information Officer) who will get to know the ins and outs of your IT environment and meet with you on a regular basis to proactively develop and plan your IT strategy. IT strategy is the process we use to take you from where you are today to where you want to go tomorrow.

The first phase is to build a solid IT foundation so that your people aren't slowed down by their technology. Then, as we get to know your business and processes, we'll help you leverage technology to support your goals and assist you in evaluating tech trends that are impacting your industry and make sure that you're adopting the right technology.



"It is hard to find 1 employee who can handle the ever-complicated world of IT. Bellwether has proven to be the answer to that issue. We have worked with Bellwether for over 10 years, and they have proven to be an excellent partner. Their team brings to the table a depth of current knowledge of IT that has been able to address any issue we may have and keeps our IT infrastructure up to date."

Your Role in Our Relationship

Everything is going to work to your advantage when you understand how our relationship works best. This might be different from what you are used to, but it is necessary in order to get the following outcomes that we have outlined below:

- Help us learn about your business and what's important to you.
- Communicate responsively and respectfully.
- Meet with your vCIO regularly.
- Invest in IT appropriately.
- Recognize the importance of cybersecurity.
- Be open to change and willing to adopt standards.
- Maintain licensing and support contracts and licensing for hardware and software.

Projects for IT Improvement

A vital component of Bellwether Technology Support Services is strategic guidance to build a solid IT foundation, so that you can leverage IT in innovative and targeted ways. Your vCIO will collaborate with you to determine what technology improvements are a priority, and the Bellwether project team will quote, plan, and implement any IT projects. Once the Parish awards the contract related to this RFP, Bellwether will review the current inventory and perform an assessment of the system and equipment for efficiency, life expectancy, capacity, and speed. Bellwether will then provide recommendations for improving routine support criteria and eliminating emergency maintenance situations. A report of this initial assessment shall be submitted within the first thirty (30) days of the contract's execution, and a review will be conducted annually as dictated by the terms of the contract.

Authorized Reseller Certifications

Bellwether acts as an authorized reseller with a variety of vendors to procure a diverse range of fixed IT assets and equipment needed for clients. For purposes of this proposal, Bellwether has provided the following re-seller references (signed certified reseller certificates can be found in the Appendix):

1. FORTINET, INC.
 - a. POC: Michael Dixon (Channel Account Manager)
 - i. E-mail: mdixon@fortinet.com
 - ii. Telephone: (866) 868-3678

2. Dell Technologies
 - a. POC: Charlie Shipp (Inside Channel Account Manager, Central Region)
 - i. E-Mail: Charlie.Shipp@dell.com
 - ii. Telephone: (830) 388-9013

3. Cisco Systems, Inc.
 - a. POC: Tom Collins (AIS Division, Cisco Solutions Group)
 - i. E-mail: tmcisco@tdsynnex.com
 - ii. Telephone: (800) 237-8931 ext: 5545103 opt:5

4. Microsoft Corporation
 - i. T: (425) 882-8080

5. HP Inc.
 - i. hpusqualifieddistributionnetwork@hp.com

6. HP Amplify
 - a. POC: Luz Orellana
 - i. E-Mail: luz.orellana@hp.com

Bellwether also is an approved service provider (SPIN # 143053313) that is eligible to participate in the E-Rate Program. Bellwether confirms its status as a "green light" company.

General Project Schedule & Onboarding

If needed, please refer to the General Project Schedule & Onboarding Process outlined on the proceeding page.

ONBOARDING PROCESS



Proprietary document - do not distribute

Bellwether Team

A great technology experience is made possible by OUR people.

As a “people first” company, we are continually investing in our employees. We know that providing our people a great place to work is a win for everyone. Our environment is set up so that employees have opportunities to grow, enjoy a great work-life balance, and develop meaningful relationships both inside and outside of work.



We're recognized as a Top Workplace by the Times Picayune which is based upon employee feedback about what it's really like to work here.

Bellwether has an extensive roster of talented IT professionals. We have over 60 employees with an average tenure of 8 years. Many employees have been with Bellwether for over 20 years!

When you have our team, you have access to a whole IT department of expertise including, but not limited to, the following roles:

- Cybersecurity engineers
- Help Desk Technicians
- Network Engineers
- Onsite Engineers
- Central Services Engineers
- Systems Administrators
- Procurement Specialists
- CIO
- Account Executives

Your Leadership Team

Every Bellwether client is assigned a dedicated Account Executive, who is responsible for day-to-day non-technical matters, such as product procurement and client meetings. A vCIO (Virtual Chief Information Officer) is assigned to every client for IT strategy development. A dedicated Project Manager will lead any IT improvement projects associated with your account.

In addition to Bellwether’s experienced IT support staff, Bellwether is proposing the following management team to be assigned to aid the Parish team:



MICHELE OMES
Account Executive
momes@belltec.com
504.588.2024



PAUL T. WESTERVELT
vCIO
pwestervelt@belltec.com
504.329.2580



GABRIELA DELGADO, PMP
Project Manager
gdelgado@belltec.com
504.588.2055

Below are additional key contacts that are always available to you as secondary resources:



JOHN HRITZ
Service Desk Lead
jhritz@belltec.com
504.588.2019



ZASHA ZEPEDA
Director of Operations
zzepeda@belltec.com
504.588.2080



MERRICK SLOSS
President
msloss@belltec.com
504.717.3526



STEVEN ELLIS
President
sellis@belltec.com
504.638.8315

Proposed Team

Bellwether resource proposal. Additional resources available upon need or request.

In order to provide support services for the technology target areas outlined in the RFP, Bellwether is proposing to make available the following list of employees (Resumes can be found in the Appendix):

1. Paul T. Westervelt (vCIO)
2. Ricky E. Kerby (Enterprise Engineer II)
 - a. Proposed RFP Position: Server Tech
 - b. Certifications:
 - i. Zerto Certified Professional
 - ii. Zerto Certified Professional Enterprise Engineer
 - iii. Zerto Certified Associate
 - iv. Microsoft Certified Professional
 - v. Tegile Certified implementation Engineer
 - vi. Exchange
 - vii. VMWare
 - viii. Veeam
3. Michael Valencia (Network Engineer II)
 - a. Proposed RFP Position: Network Tech
 - b. Certifications:
 - i. Cisco Certified Network Associate
 - ii. Cisco Certified Network Associate Wireless
 - iii. Microsoft Windows Servers 2012R2 - 2019
 - iv. On Premises Active Directory, Microsoft 365 and Azure Cloud services
 - v. Microsoft Windows Desktop OS
 - vi. TCP\IP, FTP, DHCP, DNS, WINS
 - vii. Cisco networking and firewalls
 - viii. VMware virtual servers
 - ix. Cisco Meraki, Ubiquiti, Aruba wireless
 - x. Cisco, Aruba, Meraki, Extreme Networks switches
 - xi. Proxim and Fluidmesh wireless for backhaul communications
4. Matthew C. Lax (Solutions Engineer II)
 - a. Proposed RFP Position: Oracle DB Administrator
 - b. Certifications:
 - i. MSPA Gold Certification, Issued June 2015, Expired June 2022 (Credential ID 493808)
 - ii. Microsoft Certified: Identity and Access Administrator Associate
 - iii. Microsoft 365 Certified: Enterprise Administrator Expert
5. Chris Pierce (Systems/Project Engineer)
 - a. Proposed RFP Position: Microsoft Tech
 - b. Certifications:
 - i. Microsoft Certified Systems Administrator: Messaging

6. John Hritz (Service Desk Supervisor)
 - a. Proposed RFP Position: PC/Help Desk Tech
 - b. Certifications:
 - i. Certified Cisco Network Associate
 - ii. CompTia Network +, Issued August 2023

7. Brian Oettli (IT Support Specialist/Escalation Engineer)
 - a. Proposed RFP Position: Server Tech
 - b. Certifications:
 - i. CompTIA Server+ Certification, Issued Jan 2019 (Credential ID COMP001020945563)
 - ii. CompTIA A+ Certification, Issued Dec 2000 (Credential ID COMP10397493; Verification No. 1943954)
 - iii. CompTIA IT Operations Specialist, Issued Feb 2016, Expired Feb 2022
 - iv. CompTIA Network+ ce, Issued Feb 2016, Expired Feb 2022
 - v. SonicWall SNSA, Issued June 2021

8. Steve Price (Developer)
 - a. Proposed RFP Position: Programmer/Analyst

9. Gabriela Delgado, PMP (Project Manager)
 - a. Proposed RFP Position: Project Manager
 - b. Certifications:
 - i. Certified Associate in Project Management (CAPM)
 - ii. Project Management Professional

Please refer to the Appendix for resumes giving detailed experience and certifications for each proposed resource.

G. Financial Profile

Please refer to the documentation from Hancock Whitney Bank on the following page that provides support of Bellwether's credit worthiness and financial stability. Bellwether can and will provide additional documentation supporting its financial health, if requested.

Bellwether understands that Jefferson Parish is requesting interested vendors to submit documentation from the past three (3) years demonstrating financial stability. Bellwether has a corporate policy not to share that sort of confidential financial information unless absolutely necessary.

With that being said, Bellwether will demonstrate its financial stability using its history of over 40 years serving the New Orleans metro area and its expansive existing client base in the Greater New Orleans area. Also, Bellwether's financial stability can further be supported by the fact that the Jefferson Parish School Board has recently selected Bellwether as an IT support vendor.



August 23, 2023

Re: Credit reference request on behalf of Bellwether Technology Corporation

To Whom It May Concern:

Bellwether Technology Corporation has maintained a banking relationship with Hancock Whitney Bank since 1995. In our opinion, Bellwether Technology Corporation is deemed credit worthy and has access to financial resources required to conduct and manage its operating activities. Should you need further assistance, please do not hesitate to contact me at (504) 586-3691.

Sincerely,

A handwritten signature in black ink, appearing to read "M.A. Kelly, Jr.", written in a cursive style.

Michael A. Kelly, Jr.
Vice President
Middle Market Banking

Appendix

The proceeding Appendix includes the following documentation:

1. Signed Certified Reseller Certificates
 - a. FORTINET, INC.
 - b. Dell Technologies
 - c. Cisco Systems
 - d. Microsoft Corporation
 - e. HP Inc.
 - f. HP Amplify
2. Written Letters of Reference
 - a. Gallo Mechanical, LLC (Thomas Lewis, Director of IT)
 - b. Hancock Whitney Bank (Scott Watson, SVP, Director-IT Support Services)
 - c. Passages Hospice, LLC (Nick Gwyn, CIO)
3. General Project Services Questionnaire
4. Resumes of Proposed Resources
 - a. Paul T. Westervelt (vCIO)*
 - b. Ricky Kerby (Enterprise Engineer II)
 - c. Michael Valencia (Network Engineer II)
 - d. Matthew C. Lax (Solutions Engineer II)
 - e. Chris Pierce (Systems/Project Engineer)
 - f. John Hritz (Technical Support Team Lead)
 - g. Brian Oettli (IT Support Specialist)
 - h. Steve Price (Developer)
 - i. Gabriela Delgado Ochoa (Project Manager)
5. RFP Package: Required Documents with Signature/Authorization
 - a. Attachment A: Insurance Requirements
 - b. Signature Page for RFP #0464
 - c. Corporate Resolution for Merrick Sloss
 - d. Notarized Affidavit for RFP #0464



Certificate of Authorized Reseller

Date: 03/07/2023

Fortinet, Inc. operates through a channel of independent distributors and resellers. Therefore, Fortinet hereby confirms that: Bellwether Technology Corporation

Having its registered place of business at:
525 St. Charles Ave. Suite 400, New Orleans, LA 70130, United States;

is currently an authorized FortiPartner and is currently authorized throughout US to sell Fortinet products as a partner with the following designations:

- Level of Engagement: Advocate
- Business Model: Integrator

This certificate is issued as of the date shown above, and is valid for 180 days from this date.

Provided the FortiPartner identified above has purchased applicable support services from Fortinet and the applicable support services have been effectively registered and contracted with Fortinet, Fortinet agrees and undertakes that Fortinet would provide support for the applicable Fortinet products according to the terms of the support agreement, available at <https://support.fortinet.com>. Fortinet Products are shipped subject to the terms of its then-current End User License Agreement, available at <http://www.fortinet.com/doc/legal/EULA.pdf>, which sets forth Fortinet's warranty.

This certificate is subject to the FortiPartner maintaining its FortiPartner Agreement with Fortinet and to Fortinet's FortiPartner guidelines. Fortinet's partner program and its guidelines are available for review at http://www.fortinet.com/partners/partner_program/fpp.html. Notwithstanding anything to the contrary herein, authorized FortiPartners do not represent Fortinet and can not make statements that are binding on behalf of Fortinet.



Manufacturer Confirmation

Gonzalo Ruiz
VP of Legal and Compliance Americas

FORTINET, INC.
899 Kifer Road
Sunnyvale, CA 94086

Telephone: +1-866-868-3678
Email: sales@fortinet.com
Website: www.fortinet.com



March 7, 2023.

**Bellwether Technology Corporation
525 SAINT CHARLES AVE STE 400 NEW ORLEANS LA 70130-3409 US
NEW ORLEANS, Louisiana 70130
US**

RE: Dell Technologies Partner Program - Authorized Reseller
Reseller: Bellwether Technology Corporation

This letter confirms that as of the date noted above, the reseller listed above is currently an authorized reseller participating in the Dell Technologies Partner Program. This relationship authorizes Reseller to resell Dell and Dell EMC products and services to commercial end users subject to the Reseller Terms of Sale at www.dell.com/resellerterms or the EMC Channel Partner Reseller Agreement, as applicable, and the Dell Technologies Partner Program Agreement.

Warm greetings,

A handwritten signature in black ink that reads "Rola Dagher". The signature is written in a cursive style with a long, sweeping underline.

Rola Dagher
Global Channel Chief



Cisco Partner Program Role Letter

Date: March 7, 2023

To: Bellwether Technologies

**Bid Number
or Project
Name:** _____

Cisco Systems, Inc. ("**Cisco**") hereby confirms that Bellwether Technologies is an authorized reseller of Cisco and that Cisco and Bellwether Technologies have entered into an Indirect Channel Partner Agreement (the "**Agreement**").

This means that Bellwether Technologies is authorized to resell and/or redistribute Cisco products and services directly to end users in USA and receive Cisco services within its territory, after having purchased and/or licensed such Cisco services and products from Cisco authorized distributors.

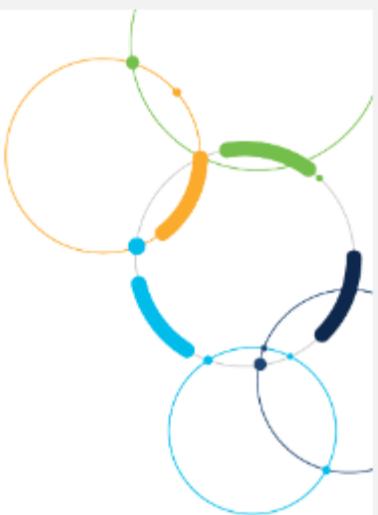
Please note that the present confirmation is not permanent, and that the status of Cisco's authorized partners are reviewed on a regular basis. This information is accurate as of the date appearing at the top of this certificate.

If you need any additional information, please do not hesitate to contact Pippa Sturkey at psturkey@cisco.com.

A handwritten signature in blue ink, appearing to read "Brian Dulac".

Brian Dulac, Director, Finance

Cisco Systems, Inc.



Registered

Awarded to: **BELLWETHER TECHNOLOGY CORPORATION**

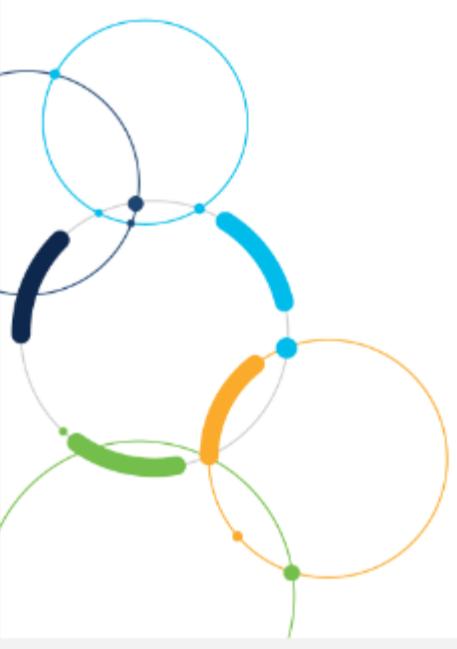
Country Group: **USA**

Valid Until: **January 18, 2024**

Validate this certificate by searching company name and location at

cisco.com/go/partnerlocator.

Certificate generated on March 8, 2023





March 9, 2023

To whom it may concern,

On October 3, 2022, the Microsoft Partner Network was renamed to the Microsoft Cloud Partner Program. In the Microsoft Partner Network, a partner's technical capabilities in Microsoft products or technologies were demonstrated by attaining silver and gold competencies.

For the purposes of in-progress Request For Proposal (RFP), this letter confirms that the partner named below did hold the legacy Microsoft Partner Networks competencies listed below and is still able to receive the benefits associated with them.

Bellwether Technology Corporation (Partner ID: 1023292)
525 St. Charles Ave.
Suite 400
New Orleans, LA - 70130-3409
United States

Legacy competencies : Demonstrate technical capabilities in Microsoft products or technologies.

- Gold Small and Midmarket Cloud Solutions
- Gold Cloud Productivity
- Silver Cloud Platform
- Silver Data Analytics

In the new Microsoft Cloud Partner program, competencies are no longer offered. Instead, partners can attain Solutions Partner designations to showcase their organization's technical capabilities, experience, and ability to deliver successful customer outcomes aligned to the Microsoft Cloud.



Best Regards,

A handwritten signature in black ink that reads "Dan Rippey".

Dan Rippey
Program Director for the Microsoft Cloud Partner Program

Microsoft Corporation



March 9, 2023

To whom it may concern:

I hereby confirm that Bellwether Technology Corporation has satisfied the requirements for demonstrating and validating their technical capabilities in the Microsoft Cloud Partner Program.

Bellwether Technology Corporation (Partner ID: 1023292)
525 St. Charles Ave.
Suite 400
New Orleans, LA - 70130-3409
United States

Solutions Partner : Demonstrate technical capabilities, experience, and ability to deliver successful customer outcomes aligned to the Microsoft Cloud.

- Solutions Partner for Modern Work

To learn more about how these Microsoft designations represent this partner's capabilities, please visit: <https://aka.ms/MicrosoftSolutionsPartner>.

Best Regards,

A handwritten signature in black ink, appearing to read "Dan Rippey".

Dan Rippey
Program Director for the Microsoft Cloud Partner Program

Microsoft Corporation

This information is current as of March 9, 2023 and this letter of certification is valid until April 8, 2023.

HP Inc.
1501 Page Mill Road
Palo Alto, CA 94304
USA
hp.com



March 8, 2023

Bellwether Technology Corporation
HPI LID 10249874
525 Sint Charles Ave 400
New Orleans, LA 70130
<https://www.belltec.com/>

Re: Partner is “Qualified” for HP Print Hardware and Supplies

Dear Partner,

This letter is to inform you that the following HP partner Bellwether Technology Corporation with HPI LID 10249874 is “**Qualified**” by HP to sell original HP print hardware and supplies products in the U.S.

Since November 1, 2014, U.S. partners must be qualified by HP to sell original HP ink and toner supplies, and as of November 1, 2015, for HP print hardware. The qualification network is the HP U.S. Qualified Distribution Network. Partners must meet a specific set of criteria annually to remain qualified.

The purpose of the HP U.S. Qualified Distribution Network is to ensure our mutual customers have the best possible experience when purchasing original HP products.

Only HP U.S. Qualified Distribution Network partners have access to HP’s programs, promotions, sales tools, data sheets, and sales materials. This ensures that HP U.S. Qualified Partners will be able to provide the best, most accurate information and programs to your customers.

If you have any questions about a partner’s status, please contact your HP sales representative or send an email to: hpusqualifieddistributionnetwork@hp.com.

Thank you for considering HP Inc. in your business needs.

[HP U.S. Qualified Distribution Network](#)



HP Amplify Membership Certificate

Effective November 1, 2022 to October 31, 2023.

Company Legal Name: Bellwether Technology Corporation (3-HSE4-8916)
Company DBA Name Bellwether Technology Corporation

is a member of the HP Amplify Partner Program with the following designation(s):

HP Amplify Synergy Partner

A handwritten signature in black ink that reads 'Kobi Elbaz'.

Kobi Elbaz

SVP & General Manager, Global Channel Organization

A handwritten signature in black ink that reads 'Stephanie Dismore'.

Stephanie Dismore

Managing Director

North America



PERFORMANCE THE RIGHT WAY
IS OUR ONLY AGENDA

Thomas Lewis
4141 Bienville Street Ste 100
New Orleans LA

To whom it may concern:

This letter is to recommend the services of Bellwether Technology to you. Before starting this partnership, I did my homework. I read customer reviews, talked to existing clients, even sat down with their competition. I wanted a professional service with a history of delivering quality customer experience. I needed a partner that could support users, freeing me to do my job, whilst also bringing the expertise to consult on new challenges and innovations in technology.

In the last few years, we have experienced exponential growth at Gallo Mechanical. This success allowed for more employees in more locations, but brought with it challenges to logistics, security, and communication. Bellwether was able to keep up with us throughout all of it. And I can honestly say that they have gone above and beyond my expectations.

The Helpdesk has been prompt and professional, and the Projects Team has gotten me through migrations, ever changing compliance requirements, and new software implementations.

Having them onboard has personally given me the peace of mind to know we are supported 24/7 across multiple locations. And that support means better network security, fast response times, and the right solutions for us.

I do not hesitate to recommend them as an MSP, and as a critical partner for your technology needs.

Sincerely,

A handwritten signature in blue ink, appearing to read "Thomas Lewis", is written over a horizontal line.

Thomas Lewis
Director of IT
Gallo Mechanical
504-944-6736



May 19, 2023

RE: Letter of Reference

Bellwether Technology has been long-term partner of Hancock Whitney Bank. We rely on Bellwether to provide critical I.T. Services to support our 200+ locations across six states. These services include desktop support for users in our financial centers and back-office locations that are geographically diverse with expedited response requirements. Bellwether supplements our internal teams by providing additional staffing when required and support for remote locations that are difficult for us to reach.

Bellwether also provides inventory management services that allows our teams to focus on urgent support needs. This service includes depot service, ordering, shipping, imaging, and asset tagging.

I am pleased with our partnership and would recommend Bellwether as a resource for any company that has a requirement to enhance their I.T. Support functions.

Sincerely,

A handwritten signature in cursive script that reads "Scott Watson".

Scott Watson

SVP, Director- I.T. Support Services

228.539.8779

Hancock Whitney Bank

hancockwhitney.com

*P*assages HOSPICE

2329 Edenborn Ave.
Metairie, LA 70001

8/22/23

To the Jefferson Parish Purchasing & Procurement Department,

Re: RFP 0464 (Information Technology Support Services)

Bellwether Technology has been the Managed IT service provider for Passages Hospice for over five years. We rely on Bellwether to provide critical IT Services to support our 5 locations and 130 employees across the State of Louisiana. These services include IT support, hardware procurement, networking and security, staff help desk, support for users in our hospice locations, and back-office support to our Jefferson Parish headquarters. Bellwether supplements our internal teams by providing expert IT services and additional staffing when required. Bellwether's support is critical to our role as we provide exceptional end-of-life care for our friends, our neighbors, and their loved ones throughout Louisiana.

Bellwether also provides inventory management services that allow our teams to focus on their job, not the setup and maintenance of those required tools. This includes hardware and software service, ordering, shipping, imaging, asset tagging, and onboarding new hires.

I am pleased with our partnership and would recommend Bellwether as a resource for any company or entity requiring IT Support services.

Passages Hospice is the only General Inpatient Hospice facility in the city of New Orleans. Passages Hospice is located on the banks of the Mississippi River in the quiet, peaceful Riverbend neighborhood. Passages Hospice utilizes a team of skilled professionals who value life and provide comprehensive care for each patient's needs. For many seriously ill patients, Passages offers hospice and palliative care services as a dignified and comfortable alternative to spending your final months in the impersonal environment of a hospital.

Passages Hospice is pleased to submit this letter in support of Bellwether Technology and its proposal.

Sincerely,



Nick Gwyn, CIO
Passages Hospice, LLC
2329 Edenborn Ave.
Metairie, LA 70001

504-250-5283

nick@passages-hospice.com

General Professional Services Questionnaire Instructions

- The General Professional Services Questionnaire shall be used for all professional services except outside legal services and architecture, engineering, or survey projects.
- **The General Professional Services Questionnaire should be completely filled out. Complete and attach ALL sections. Insert “N/A” or “None” if a section does not apply or if there is no information to provide.**
- Questionnaire must be signed by an authorized representative of the Firm. Failure to sign the questionnaire shall result in disqualification of proposer pursuant to J.P. Code of Ordinances Sec. 2-928.
- All subcontractors must be listed in the appropriate section of the Questionnaire. Each subcontractor must provide a complete copy of the General Professional Services Questionnaire, applicable licenses, and any other information required by the advertisement. Failure to provide the subcontractors' complete questionnaire(s), applicable licenses, and any other information required by the advertisement shall result in disqualification of proposer pursuant to J.P. Code of Ordinances Sec. 2-928.
- If additional pages are needed, attach them to the questionnaire and include all applicable information that is required by the questionnaire.

General Professional Services Questionnaire

A. Project Name and Advertisement Resolution Number:

RFP No. 0464: To Provide Information Technology Services and Supplemental Staffing for the Departments for Electronic Information Systems (EIS) and Telecommunications

B. Firm Name & Address:

Bellwether Technology Corporation
4423 LaSalle Street
New Orleans, LA 70115

C. Name, title, & contact information of Firm Representative, as defined in Section 2-926 of the Jefferson Parish Code of Ordinances, with at least five (5) years of experience in the applicable field required for this Project:

Merrick Sloss, President
4423 LaSalle Street
New Orleans, LA 70115
T: 504-588-2040
F: 504-588-2044
msloss@belltec.com

D. Address of principal office where Project work will be performed:

Bellwether Technology Corporation
4423 LaSalle Street
New Orleans, LA 70115

E. Is this submittal by a JOINT-VENTURE? Please check:

YES NO

If marked "No" skip to Section H. If marked "Yes" complete Sections F-G.

F. If submittal is by JOINT-VENTURE, list the firms participating and outline specific areas of responsibility (including administrative, technical, and financial) for each firm. Please attach additional pages if necessary.

1.

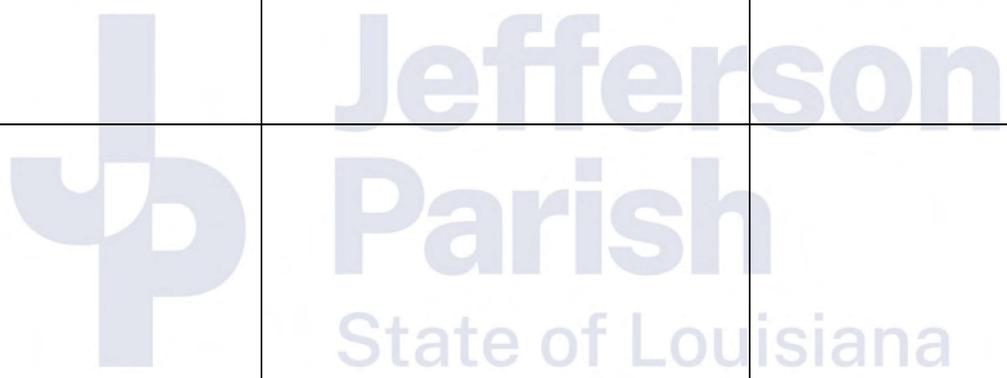
2.

General Professional Services Questionnaire

G. Has this JOINT-VENTURE previously worked together? Please check: YES NO

H. List all subcontractors anticipated for this Project. Please note that **all subcontractors must submit a fully completed copy of this questionnaire, applicable licenses, and any other information required by the advertisement. See Jefferson Parish Code of Ordinances, Sec. 2-928(a)(3). Please attach additional pages if necessary.**

Name & Address:	Specialty:	Worked with Firm Before (Yes or No):
1. N/A. Bellwether will NOT be working with any subcontractors for this Project. All of Bellwether's services are provided by in-house employees.		
2.		
3.		
4.		
5.		



General Professional Services Questionnaire

I. Please specify the total number of support personnel that may assist in the completion of this Project:
5-10+

J. List any professionals that may assist in the completion of this Project. If necessary, please attach additional documentation that demonstrates the employment history and experience of the Firm's professionals that may assist in the completion of this Project (i.e. resume). Please attach additional pages if necessary.

PROFESSIONAL NO. 1

Name & Title:

Brian Oettli (IT Support Specialist)

Name of Firm with which associated:

Bellwether Technology Corporation

Description of job responsibilities:

Tier II handles higher priority and escalated tickets that demand the attention to detail and experience. My daily activities also include training of new hires, providing guidance for tier I, and authoring technical documentation. In addition to being a full-time phone agent for service desk calls, I'm sent on-site to build closer relationships with VIP clients. I believe in what I do and enjoy troubleshooting. If a situation calls for white glove treatment, the call goes to me.

Years' experience with this Firm:

6 years

Hire Date: July 2017

Education: Degree(s)/Year/Specialization:

Andrew Jackson Fundamental Magnet High School
Diploma, General Studies (1994-1998)

Other experience and qualifications relevant to the proposed Project:

Licenses & certifications:

CompTIA Server+ Certification, Issued Jan 2019 (Credential ID COMP001020945563)

CompTIA A+ Certification, Issued Dec 2000 (Credential ID COMP10397493; Verification No. 1943954)

CompTIA IT Operations Specialist, Issued Feb 2016, Expired Feb 2022

CompTIA Network+ ce, Issued Feb 2016, Expired Feb 2022

SonicWall SNSA, Issued June 2021

General Professional Services Questionnaire

PROFESSIONAL NO. 2
Name & Title:
Ricky Kerby (Enterprise Engineer II)
Name of Firm with which associated:
Bellwether Technology Corporation
Description of job responsibilities:
Deployment, Management and Design of SAN systems and SAN technologies. Design, implementation of servers based on the needs of our clients. Utilizing Microsoft Server technologies on all of the latest versions of Windows to meet the needs and requirements of our clients. Office 365, Azure, SharePoint, Teams migration, design and management for our clients. Work with virtualization products with the Latest technologies from Azure, VMWare, and Microsoft.
Years' experience with this Firm:
6+ years Hire Date: November 2016
Education: Degree(s)/Year/Specialization:
Delta College Inc (1988-1990) Associate's Degree, Engineering
Other experience and qualifications relevant to the proposed Project:
Certifications: <ul style="list-style-type: none">• Zerto Certified Professional• Zerto Certified Professional Enterprise Engineer• Zerto Certified Associate• Microsoft 365 Certified: Teams Administrator Associate• Veeam VMSP• Veeam VMTSP• Tintri Intelliflash Deployment Enabled Engineer

General Professional Services Questionnaire

PROFESSIONAL NO. 3
Name & Title:
John Hritz (Technical Support Team Lead)
Name of Firm with which associated:
Bellwether Technology Corporation
Description of job responsibilities:
Team lead, which involves working tier 2 tickets, as well as managing all tier 1/2 team members. Manage incoming tickets and delegate accordingly, monitor off-line servers and delegate/rectify as needed. Provide guidance for tier 1 on how to solve issues that are escalated to me, as well as some software implementation (Azure SSO for Mimecast as an example).
Years' experience with this Firm:
2 years Hire Date: July 2021
Education: Degree(s)/Year/Specialization:
West Mobile High School (2003-2007)
Other experience and qualifications relevant to the proposed Project:
Continued the same skills from my previous job: Sonicwall maintenance, Cisco switch management, as well as DHCP/ DNS management on Windows server, versions 2008-2019.Promoted to team lead, which involved working tier 2 tickets, as well as managing all tier 1/2 team members. Manage incoming tickets and delegate accordingly, monitor offline servers and delegate/rectify as needed. Provided guidance for tier 1 on how to solve issues that were escalated to me, as well as some software implementation (Azure SSO for Mimecast as an example) Continued the same skills from my previous job: Sonicwall maintenance, Cisco switch management, as well as DHCP/DNS management on Windows server, versions 2008-2019. Skills: Azure API Management · Team Leadership · Analytical Skills · ConnectWise Automate

General Professional Services Questionnaire

PROFESSIONAL NO. 4
Name & Title:
Michael Valencia (Network Engineer 2)
Name of Firm with which associated:
Bellwether Technology Corporation
Description of job responsibilities:
Provide onsite and remote support to clients. Troubleshoot, diagnose, and resolve network related issues. Devise, plan, and implement large scale network projects alongside vendors and other IT groups. Collaborate with clients to assess future needs to their network infrastructure. Configure firewalls, switches, and wireless access points. Work with other Bellwether teams in the monitoring and maintenance of client networks.
Years' experience with this Firm:
6+ years (2 terms with company) Current Hire Date: August 2018 First Hire Term: October 2016-December 2017
Education: Degree(s)/Year/Specialization:
Bachelor of Science in Computer Science, University of New Orleans, New Orleans, LA
Other experience and qualifications relevant to the proposed Project:
TECHNOLOGIES: <ul style="list-style-type: none">• Microsoft Windows Servers 2012R2 - 2019• On Premises Active Directory, Microsoft 365 and Azure Cloud services• Microsoft Windows Desktop OS• TCP/IP, FTP, DHCP, DNS, WINS• Cisco networking and firewalls• VMware virtual servers• Cisco Meraki, Ubiquiti, Aruba wireless• Cisco, Aruba, Meraki, Extreme Networks switches• Proxim and Fluidmesh wireless for backhaul communications.

General Professional Services Questionnaire

PROFESSIONAL NO. 5
Name & Title:
Matthew C. Lax (Escalation Engineer II & Systems Engineer)
Name of Firm with which associated:
Bellwether Technology Corporation
Description of job responsibilities:
Network, server, workstation, and phone escalations and solutions engineer.
Years' experience with this Firm:
5+ years Hire Date: November 2017
Education: Degree(s)/Year/Specialization:
Newbury College – Brookline, MA (2003-2007) Bachelor of Business Administration (BBA)
Other experience and qualifications relevant to the proposed Project:
MSPA Gold Certification, Issued June 2015, Expired June 2022 (Credential ID 493808) Computer / Web / IT: Windows, Apple/Mac OS/iOS, Linux, Unix, Android, MySQL, HTML, CSS, PHP, Javascript, Apache, OOP, MVC, NAS/SAN, Wordpress Joomla, CRM, SHOUTcast/Icecast, VOIP/SAP, graphic design, officesuites, helpdesk systems, building and repairing computer hardware.

General Professional Services Questionnaire

K. List all prior projects that best illustrate the Firm's qualifications relevant to this Project. Please include any and all work performed for Jefferson Parish. Please attach additional pages if necessary.

PROJECT NO. 1

Project Name, Location and Owner's contact information:	Description of Services Provided:
St. Charles Parish School Board POC: Stephanie Steib ssteib@stcharles.k12.la.us	Level 1 & 2 Service Desk Support Product Procurement Burn In and Imaging PC Deployment Hardware Breakfix Dedicated 4.5 Person Team Supporting 1600 Employees & 9800 Students
Length of Services Provided:	Cost of Services Provided:
14 Years (current contract)	410k Annually

PROJECT NO. 2

Project Name, Location and Owner's contact information:	Description of Services Provided:
Managed IT Service Provider Hancock Whitney Bank POC: Scott Watson scott.watson@hancockwhitney.com	Level 1 Service Desk Support Product Procurement Burn In and Imaging PC Deployment Hardware Breakfix Dedicated 2.5 Person Team Supporting 3600 Employees
Length of Services Provided:	Cost of Services Provided:
30 Years (Current contract)	<Confidential Client Agreement>

General Professional Services Questionnaire

PROJECT NO. 3	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Managed IT Services Pan-American Life Insurance Group POC: Jennifer Noteware jnoteware@palig.com	Level 1 & 2 Service Desk Support Dedicated 8 Person Team Team Management Supporting 2300 Users
Length of Services Provided:	Cost of Services Provided:
9 Years (Current contract)	<Confidential Client Agreement>

PROJECT NO. 4	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Managed IT Services Gallo Mechanical POC: Thomas Lewis thomasl@gallomech.com	Level 1 Service Desk Support Burin In & Imaging PC Deployment Compliance Projects Cybersecurity
Length of Services Provided:	Cost of Services Provided:
4 Years (Current contract)	<Confidential Client Agreement>

General Professional Services Questionnaire

PROJECT NO. 5	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Managed IT Services Atalco Grammercy POC: Ryan Caravella ryan.caravella@atalco.com	Level 1 & 2 Service Desk Cybersecurity
Length of Services Provided:	Cost of Services Provided:
5 Years (Current contract)	<Confidential Client Agreement>

PROJECT NO. 6	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Managed IT Services John W. Stone Oil POC: Claudelle Vallette cvallette@stoneoil.com	Full Managed IT Service Desk IT Infrastructure Management IT Strategy Cybersecurity Wireless Projects for Offshore Vessels Site to Site Wireless Bridge Projects Remote Office Set Up & DR
Length of Services Provided:	Cost of Services Provided:
14 Years (Current contract)	<Confidential Client Agreement>

General Professional Services Questionnaire

PROJECT NO. 7	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Managed IT Services The Kullman Firm POC: Ray LoCicero rkl@kullmanlaw.com	Full Managed IT Service Desk IT Infrastructure Management IT Strategy Cybersecurity Azure AD & Server Optimization
Length of Services Provided:	Cost of Services Provided:
<1 Year (Current contract)	<Confidential Client Agreement>

PROJECT NO. 8	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Managed IT Services Burghardt Insurance POC: Dean Basse dbasse@burghardt.com	Full Managed IT Service Desk IT Infrastructure Management IT Strategy Cybersecurity Complete Datacenter Migration of Infrastructure
Length of Services Provided:	Cost of Services Provided:
9 Years (Current contract)	<Confidential Client Agreement>

General Professional Services Questionnaire

PROJECT NO. 9	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Managed IT Services Longbranch Healthcare POC: Holland Counce hollandc@longbranchhealthcare.com	Full Managed IT Service Desk IT Infrastructure Management IT Strategy Cybersecurity
Length of Services Provided:	Cost of Services Provided:
4 Years (Current contract)	<Confidential Client Agreement>

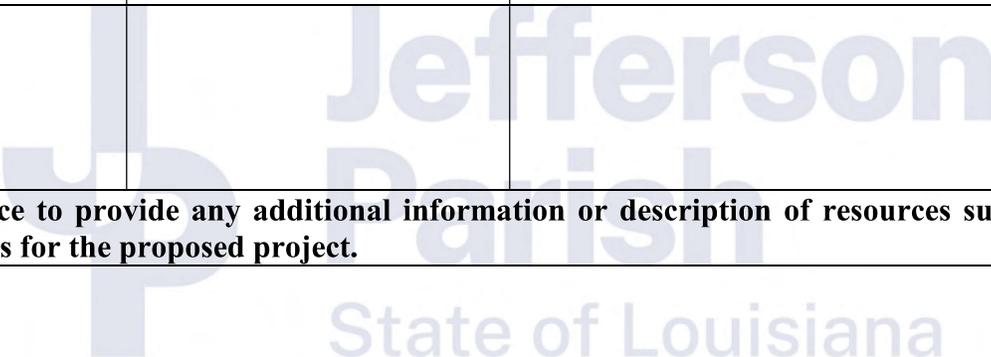
PROJECT NO. 10	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Managed IT Services Passages Hospice POC: Nick Gwyn nick@passages-hospice.com	Full Managed IT Service Desk IT Infrastructure Management IT Strategy Cybersecurity
Length of Services Provided:	Cost of Services Provided:
4 Years (Current contract)	<Confidential Client Agreement>

General Professional Services Questionnaire

L. List all prior and/or on-going litigation between Firm and Jefferson Parish. Please attach additional pages if necessary.

Parties:		Status/Result of Case:
Plaintiff:	Defendant:	
1.	N/A-No prior or on-going litigation between Firm & Jefferson Parish	
2.		
3.		
4.		

M. Use this space to provide any additional information or description of resources supporting Firm's qualifications for the proposed project.



N. To the best of my knowledge, the foregoing is an accurate statement of facts.

Signature: Merrick Sloss Print Name: Merrick Sloss

Title: President Date: 5/4/23

Paul T. Westervelt

Experience

Bellwether Technology, New Orleans, LA

Jan 2018 - Present

vCIO, Compliance Manager

- Meet with client management to conduct QBRs, review technical environments, review technology budgets, and plan new services and upgrades that drive business process improvements as well as compliance with Bellwether's technical standards.
- Work with account managers and project engineers to design solutions and prepare project proposals.
- Assist clients in responding to regulatory compliance audits. Assist clients with upgrading systems and controls to meet regulatory, industry and insurance compliance requirements with a strong focus on security.
- Work with the onboarding team to review new client intake while meeting with the client to resolve technical deficiencies revealed during discovery.
- Work with PMs and engineers to manage client expectations regarding project outcomes and solutions.
- Support account managers on sales calls and day-to-day client interactions as their technical advisor.
- Responsible for Bellwether's internal compliance audits and certifications, most recently managed the companies' SOC 1 / SSAE 18 Type II audit to successful completion.
- Previously managed sales, consulting, and technical support for Bellwether's small office (SOHO) clients.
- Previously promoted and sold Bellwether service agreements to the New Orleans small office/home office market segment while increasing retention of current base of SOHO clients under contract.

IBERIA Capital Partners,

Subsidiary of IBERIABANK New Orleans, LA *Oct 2011 – Jan 2018*

Vice-President, Director of Institutional Equity Trading

- Manage trading desk activity and order flow including the direction and development of junior traders.
- Partnered with IT to develop systems that improved reporting and compliance issues.
- Manage the trade clearing process for all institutional orders, following orders to settlement and working to correct any errors pre-settlement.
- Responsible for leading the morning meeting daily, presenting market moving macro events as well as insight into commodity price fluctuations in oil and natural gas to the research and sales team.
- Responsible for writing and distributing a weekly oil market note with insight on weekly EIA Oil inventories.
- Develop and maintain relationships with "buy-side" client trading desks to improve sales order flow including travel to client locations around the US.
- Responsible for managing compliance with SEC and FINRA regulations for all trading activity on the desk.
- Responsible for risk management – maintaining market risk with client positions within limits for the trading desk and its traders.

Madison Williams & Co., New Orleans, LA

Dec 2009 - Oct 2011

Vice-President, Institutional Equity Trader

- Build and maintain relationships with clients communicating research ideas and generating trade order flow.
- Soliciting, executing, and crossing large blocks of stock for institutions.
- Working with the sales team to communicate market moving information on stocks and our desk inventory.

Sanders Morris Harris Inc, New Orleans, LA

Oct 2008 – Dec 2009

Vice-President, Institutional Equity Trader

- Head of Energy Trading for Sanders Morris' institutional clients.
- Managed the conversion of the Institutional trading desk when Sanders Morris bought my previous firm, Coker & Palmer. Worked to transition contracts, relationships, compliance, and clients as well as recruit new traders.
- Restructured the technology platform and trading strategies to increase revenue and optimize manpower.

- Build and maintain relationships with clients, promoting research ideas and generating trade orders/flow.

Coker & Palmer, New Orleans, LA

Partner and Head Trader

Oct 2005 – Oct 2008

- Established and designed the technology for a new office and the systems used in an institutional equity trading desk for a start-up sell side energy research firm.
- Responsible for all compliance, clearing and back-office operations.
- Managed other traders' executions, compliance, and interactions with clients
- Recruited and trained junior traders.
- Responsible for developing and maintaining relationships with "buy-side" traders to distribute our research calls and order flow.

Sterne, Agee & Leach, Inc, Birmingham, AL

Institutional Equity Trader

May 2003 – Sep 2005

- Established and designed the technology used in an institutional equity trading desk for a bank with existing retail-only equity trading to grow new business for the firm with intuitions and financial advisors.
- Soliciting, executing, and crossing large blocks of stock for institutions.
- Managed clearing activity for institutional trading as well as reporting for compliance.

Bayou Securities, LLC, Stamford, CT

Position trader

Nov 2002 – Apr 2003

- Planned and implemented the technology systems for a new office as well as the systems used in an equity trading desk for a hedge fund.
- Worked with investment managers to monitor and execute investment strategies and financial positions.
- Assisted portfolio managers with idea generation for new investments based on money flows and market movements as well as technical chart interpretation.
- Worked with other sales traders to promote and move large blocks of stock between financial institutions.

Johnson, Rice & Co., New Orleans, LA

Assistant Trader and IT Manager

Feb 2001 – Nov 2002

- Responsible for all information technology design, implementation, and support for a 75-person broker/dealer.
- Executed and crossed large orders for institutions and financial advisors by working with NYSE/AMEX floor brokers and market makers as well as with sales/position traders.
- Assisted with new client account establishment including documentation and setup in Clearing firm systems.

Computerland, New Orleans, LA

Field Engineer and staff-augmentation

Sep 1996 – Feb 2001

- Field Technician – break/fix desktop, server, network, printer service calls operating out of the service department located at 211 Carondelet St. downtown NOLA.
- On-site support contract for Mobile Oil refinery Chalmette for 2 years - staff augmentation.
- On-site technical support contract for Ochsner Hospital, main campus for 2 years – staff augmentation.

Education

University of New Orleans

Bachelor of Science in Finance with a minor in Accounting, August 2016. GPA 3.44/4.0

Technically oriented with experience in networking, desktop support, Windows server, Azure, MS 365, Veeam, VMware, Unifi, Cisco, Meraki, HPE and Dell servers.

Enjoy technical problem solving - learn by breaking, fixing, and improving in home lab environments. Network/structured cable install and termination experience.

Compliance and cybersecurity focused with experience assisting clients with NIST, 23 NYCRR 500, HIPAA, SOC, HITRUST, and cyber-insurance compliance requirements.

Ricky E. Kerby

Bellwether Technology

Enterprise Engineer II
rkerby@belltec.com

Objective

To work for a company I can utilize all of my skills, and learn and develop new skills and knowledge and to grow and advance in my career. Try not to become a man of success, but rather try to become a man of value.

Skills & Abilities

Deployment, Management and Design of SAN technologies. Utilizing Microsoft Server technologies on all of the latest versions of Windows to meet the needs and requirements clients. Office 365, Azure, SharePoint, Teams migration and management for clients. Experienced with virtualization with the Latest technologies from Azure, VMWare, and Microsoft design, management and implementation. Proficient in backup software products like Veeam, Zerto etc. and planning and design of disaster recovery.

Certifications:

- Zerto Certified Professional
- Zerto Certified Professional Enterprise Engineer
- Zerto Certified Associate
- Microsoft 365 Certified: Teams Administrator Associate
- Veeam VMSP
- Veeam VMTSP
- Tintri Intelliflash Deployment Enabled Engineer

Experience

Bellwether Technology

2016-Present

Enterprise Engineer II

Deployment, Management and Design of SAN systems and SAN technologies. Design, implementation of servers based on the needs of our clients. Utilizing Microsoft Server technologies on all of the latest versions of Windows to meet the needs and requirements of our clients. Office 365, Azure, SharePoint, Teams migration, design and management for our clients. Work with virtualization products with the Latest technologies from Azure, VMWare, and Microsoft.

Technology Professionals

2012-2016

Senior Engineer / Project Manager

Systems engineering, SAN deployment and administration, Consulting, Systems design and disaster recovery of network systems, network security as well as Project Management.

Restech Information Services

2008-2012

Responsible for the initial design, installation, configuration, consulting and ongoing maintenance for all of the clients of Restech Information Services. Performed the initial discovery, business analysis, technology recommendations, designs, installations and configurations, and ongoing upgrades, maintenance, and troubleshooting for LAN, WAN, Security, Servers, and Operating Systems. Completed multiple large-scale projects on time and under budget with little or no downtime for the client during the time work was performed on the systems.

First Bank and Trust

2005-2008

Data Security Officer / Network Administrator

Responsible for the administration implementation of the Bank's IT server infrastructure and user support on a daily basis. As Data security officer was responsible for the banks data security and compliance under FDIC regulations.

Organizations

Graduate of the FBI Citizen's Academy

FBICAA

ISACA

MIT Learning

MICHAEL VALENCIA

SUMMARY

A seasoned IT Professional with 20 years experience. Diverse range of skills with an emphasis on managing a Microsoft server and Active Directory infrastructure. Familiarity with Cisco networking technologies. Consistently delivers a high level of service in both a small office and a large Fortune 16 enterprise environment. Resourceful and levelheaded team member with demonstrated ability to take on new roles when needed and produce a positive outcome for the group.

TECHNOLOGIES:

- Microsoft Windows Servers 2012R2 - 2019
- On Premises Active Directory, Microsoft 365 and Azure Cloud services
- Microsoft Windows Desktop OS
- TCP/IP, FTP, DHCP, DNS, WINS
- Cisco networking and firewalls
- VMware virtual servers
- Cisco Meraki, Ubiquiti, Aruba wireless
- Cisco, Aruba, Meraki, Extreme Networks switches
- Proxim and Fluidmesh wireless for backhaul communications.

PROFESSIONAL EXPERIENCE

BELLWETHER TECHNOLOGY

Aug 2018 – Present

Network Engineer 2

Provide onsite and remote support to clients. Troubleshoot, diagnose, and resolve network related issues. Devise, plan, and implement large scale network projects alongside vendors and other IT groups. Collaborate with clients to assess future needs to their network infrastructure. Configure firewalls, switches, and wireless access points. Work with other Bellwether teams in the monitoring and maintenance of client networks.

FLOUR FEDERAL PETROLEUM OPERATIONS

Jan 2018 – Aug 2018

Senior Network Engineer

Provide escalation support to the helpdesk. Work with peers in the monitoring, maintenance and troubleshooting of the datacenter servers and network equipment.

BELLWETHER TECHNOLOGY**Oct 2016 – Dec 2017***Systems Engineer / Lead*

Provide both remote and onsite last tier direct support to clients on a broad array of technologies including workstations, servers, and LAN/WAN network components. Troubleshoot and resolve complex PC, server, and network issues and support Microsoft core operating systems and business applications.

Work collaboratively with peers to provide quick response, diagnosis, and resolution of client issues

Perform both remote and onsite hardware and software repairs, upgrades, and installations.

Serve as technical lead on client projects. Help provide mentoring and training to team members and serve as an escalation point for resolving client technical issues. Communicate effectively with clients on the status of tickets, resolutions and projects. Clearly document and explain complex client networks

PARATECH LLC, HARRAHAN, LA**2008 – Oct 2015****WWW.PTECHLLC.COM***Senior Network Engineer / Partner*

A senior member of an IT support staff that provided support and consulting work for all Paratech clients. The work consisted of providing a next level escalation tier support or be the first contact for computer/network related issues for the onsite contacts. Recommend any hardware and software solutions to fit a particular need for the client. Perform network audits and recommend network improvements to the client. At times, fill in role as project manager on IT related projects and collaborate with other vendors. Participate in security reviews with auditors as an IT liaison for clients and recommend solutions regarding audit findings.

- Led an install team that installed backhaul communications and several point to multipoint wireless links across 15 miles of infrastructure for the Port of New Orleans.
- Participated in BP's "Build" team as a network engineer during BP's Deepwater Horizon Oil Spill Response Project. That team was responsible for building BP's sites including their headquarter sites in each state. (I did not participate in the site build for BP's Louisiana Headquarters in downtown New Orleans but I did participate in the MS, AL, and FL buildouts).
- Perform several physical to virtual server conversions
- Migrated several Novell Netware\Groupwise environments to a Microsoft Windows Server\Exchange environment
- Participated in server and network upgrade projects to replace aging servers, network switches, firewalls, and routers.

MCKESSON CORPORATION, HARRAHAN, LA**2003 – 2008****WWW.MCKESSON.COM***Network/ Desktop Specialist III*

A member of Mckesson's End User Computing support staff that provided tier 2/tier 3 support for 30,000 employees across the U.S. Oversee and maintain workstations and servers in a Microsoft enterprise environment. Collaborate with other IT groups during corporate-wide upgrades and implementations. Provide on-call support and first point of contact in the event of an outage. Maintain password security, data integrity, and file system security. Communicate highly technical information to both technical and

non technical personnel. Recommend hardware and software solutions, including new acquisitions and upgrades. Maintain the Cisco Security Agent management servers in the corporate data centers and provide second level support for the Cisco Security Agent for over 10,000+ laptops in the network.

- Relocated and restored a working server/desktop infrastructure at a temporary facility in Pineville, LA immediately after Hurricane Katrina
- Developed and implemented a plan to safely migrate the IT equipment from the temporary facility in Pineville, LA to the main facility in Harahan, LA during post-Hurricane Katrina recovery process
- Spearheaded an effort to assume management on short notice of an important Cisco desktop security application that would affect about 10,000 laptops across McKesson's IT infrastructure.

NOIS, HARAHAH, LA**2002 – 2003****WWW.NOIS.NET***Jr. Network Engineer*

Performed in-house hardware and software installations. Maintained system backups and backup tape rotations. Performed software updates to the antivirus software, Microsoft Windows desktop, and server operating systems. Analyzed and troubleshoot hardware and software issues. If necessary, escalated issue to vendor support and worked with vendor to resolve the issue. Participated in mass deployments of new hardware and software. Performed maintenance of network devices such as switches, routers, printers, and print servers.

EDUCATION

Bachelor of Science in Computer Science, University of New Orleans, New Orleans, LA

Matthew C. Lax

New Orleans, LA -- (

CORE COMPETENCIES

Operating Systems: Windows, Mac OS, iOS, Android, Linux, Unix, Cisco IOS

Programming Languages: HTML, CSS, PHP, Javascript, SQL, C++

Software: Microsoft Office, Openoffice, Google Docs, Adobe Creative Suite, GIMP, Inkscape, WordPress, Joomla, Apache, Sony Vegas, cPanel & WHM, MySQL

Associated Skills: LAN/WAN & Wireless Networking, DNS, Graphic Design, NAS, Website Load Testing & Optimization, Server Security, Computer Hardware, Written & Interpersonal Communications.

WORK EXPERIENCE

Freelance Web Development & Consulting 1994 - Present

- Created websites for an extensive range of business purposes and software platforms.
- Aided in the strategics for a multitude of internet based businesses and products.

Broadcast IT and Web Developer - UR Business Network 2013 - Present

- Key architect in the content creation and distribution platform on which the company operates.

Website Manager - Green Side Up Gallery 2013 - Present

- Operates and maintains the retail eCommerce site. Develops and executes online marketing.

General Manager - UNregular Radio 2010 - 2013

- Managed the 20+ person staff, recording studios, physical facilities, workstations, network, servers, online assets, and broadcast of over 35 live weekly radio shows.
- Developed website with streaming media and eCommerce, plus Android and iPhone apps.

Principal/Founder - Relax Solutions, LLC 2007 - 2009

- Wrote over 250,000 words of unique digital content and sales material copy. Graphic designer.
-

EDUCATION

Bachelors in Business Management - Newbury College Brookline, MA 2004 - 2007

- Graduated Magna Cum Laude with a 3.63 Cumulative GPA.
- Learned excellent written and verbal business communication.

Computer Science Major - Wentworth Institute of Technology Boston, MA 2002 - 2004

Matt Lax

Skill Profile:

- ◆ **Computer / Web / IT:** Windows, Apple/Mac OS/iOS, Linux, Unix, Android, MySQL, HTML, CSS, PHP, Javascript, Apache, OOP, MVC, NAS/SAN, Wordpress Joomla, CRM, SHOUTcast/Icecast, VOIP/SAP, graphic design, office suites, helpdesk systems, building and repairing computer hardware.
- ◆ **Audio Engineering / Production:** Microphone theory and setup, PA and sound reinforcement systems, live sound Mixing and recording, computer audio interfaces, digital broadcasting and audio streaming, audio hardware testing and repair, acoustic room tuning, digital and analog signal processing, digital audio formats (WAV, FLAC, AIFF, MP3, AAC), audio production software.
- ◆ **Media / Marketing / Sales / PR:** Web publishing, blogging, SEO, social media for business (Facebook/Twitter/LinkedIn/Youtube), trend evangelism, web traffic strategies, IP law and releases/licensing, interviewing, business writing and telephone etiquette, PR communications, photography/videography and photo/video editing.
- ◆ Excellent interpersonal communication with teammates and while providing customer service.

Work Experience:

- ◆ **UR Business Network – Technical Consultant** May 2013 – Present
Woburn, MA – Business podcasting and media company. Currently a top 10K USA website (Alexa.com)
 - Manage company's recording, broadcasting, and publishing of audio, video and other digital media.
 - Primary web developer for multiple Wordpress CMS based sites, trains staff in posting and SEO.
 - Engineer and maintain the IT infrastructure. Build and maintain audio recording studios.
 - Produce and edit radio shows and podcasts. Restore damaged audio recordings.
 - Guide the company's short and long-term strategies for both marketing and sales.
- ◆ **Green Side Up Gallery – Digital Marketing Consultant** August 2012 – Present
Boston / Online – Glassblowing studio and galleries in Colorado, Massachusetts, and Rhode Island.
 - Operate the retail eCommerce site. Develop and execute online marketing strategies.
 - Create and document procedures for photographing and publishing items to the online store.
 - Interview artists and write articles and other content for the company website.
 - Perform photography, journalism, retail sales, and brand ambassadorship at music festivals and other events, including: moe.down 2012 & 2013, Summer Camp Music Festival 2013, Wakarusa Music Festival 2013, Mountain Jam 2013, Camp Bisco 2013.
- ◆ **UNregular Radio – General Manager** June 2010 – April 2013
Boston, MA – Internet radio station in downtown Boston that boasted over 35 live weekly shows.
 - Managed the staff, audio recording studios, physical facilities, computers and network, online assets, and 5 channels of live 24/7 audio broadcast including distribution. Led management team.
 - Developed complex website with streaming media and eCommerce components.
 - Established company procedures, performed HR functions, and oversaw the day-to-day operations.
 - Organized and produced concerts and other events. Performed staff-level functions when needed such as audio engineer, doorperson, and merchandise sales.
 - Mixed live sound for broadcast and recording both in-studio and at large live events including: Boston Freedom Rally 2010, 2011, & 2012, Bear Creek Music Festival 2011, and Wakarusa Music Festival 2012.
 - Installed on-site networks to provide reliable internet connectivity at remote festival and event locations for both broadcasts and administrative functions.
 - Managed company press and PR activities and performed photo/audio/written coverage at large events such as Camp Bisco 2011, Gathering of the Vibes 2011 & 2012, and Snowball Music Festival 2012.
 - Copyright officer in charge of ensuring royalty payment and DCMA compliance. Liaison to SoundExchange, ASCAP, and BMI. Drafted and managed artist releases for broadcasts and other intellectual property use.
 - Acted as sales leader, training staff, and negotiating/closing top-level deals.

- ◆ F Nice Records – President April 2007 – December 2010
Boston, MA – Record label helping artists with the challenges faced by musicians in the digital age.
 - Performed all administrative functions of the company.
 - Negotiated and drafted contracts for sponsorships, performances, merchandising, and management.
 - Organized, marketed, and produced concerts and multi-city tours. Managed live event productions.

- ◆ Relax Solutions LLC – Principle/Founder January 2007 – May 2009
Internet Based – Self-owned copywriting and SEO company.
 - Established the new business and developed the website and all sales/market materials. Bid jobs.
 - Wrote over 250,000 words of unique digital content and sales material copy.

- ◆ We Print Shirts 4 Less – Lead Designer January 2007 – January 2009 *Boston, MA – Shirt and sticker screen printing company and graphic design.*
 - Lead designer in charge of ensuring the quality of all graphics and prints.
 - Created, manipulated, and converted graphics for pre-press through many formats and mediums.
 - Serviced and maintained all printing equipment (both digital printers and screen printing equipment).

- ◆ Ultimate Parking – Valet / Manager November 2002 – May 2005
Boston, MA – Valet Parking Company
 - Served the Ritz-Carlton Boston and W Boston hotels and completed training in 5-star customer service.
 - Promoted to Overnight Supervisor. Managed all nighttime valet duties and employees.

- ◆ SoVerNet, Inc. – IS Engineer August 2000 – May 2002
Bellows Falls, VT – Internet and Phone Service Provide
 - Administrated and maintained the internal network including workstations, servers (Windows and Unix), routers, switches, all wiring, and connections between remote offices.
 - Requisitioned, configured, and deployed all new computer equipment, both hardware and software.
 - Repaired phone and Internet systems for both residential an enterprise level customers.
 - Wrote out procedures and how-to guides for use by employees in many different departments.

Education:

- ◆ Newbury College – Brookline, MA September 2004 – August 2007
 - Graduated with a BS in Business Management, Magna Cum Laude with a 3.63 Cumulative GPA.
 - Studied leadership, organizational theory, the principles and acquisition of financing, financial and managerial accounting, basic personal and business taxation, use of technology in business. ➤ Learned excellent written and verbal business communication.

- ◆ Wentworth Institute of Technology – Boston, MA September 2002 – January 2004 ➤ Studied Computer Science, including Object Oriented Programming and Database Systems.

- ◆ Southern Vermont Career Education Center – Brattleboro, VT Graduated January 2001
 - Completed two years of vocational electronics training including analog and digital electronics, audio principles and equipment design, and fiber-optic technology principles and operation.
 - Underwent Cisco Certified Network Associate training and gained a full understanding of computer networking technologies and administration (later acquired CCNA certificate).



CHRIS PIERCE – SYSTEMS/PROJECT ENGINEER AT BELLWETHER

OBJECTIVE I am a motivated and analytical IT Professional with more than 15 years of experience in managing security and network infrastructure. I am interested in working in an environment where I can apply my expertise while I continue to grow and learn.

SKILLS

Hardware
Assembly, Maintenance, Drivers, Troubleshooting, PBX Management, Hosted Telephony Devices

Software
Installation, Microsoft Office, Microsoft 365, Exchange Online, Azure AD, Hyper-V, Veeam, Docuware, DocuPhase

Operating Systems
Window Desktop, Windows Server, Linux

Network
Configuration, Routers, Firewalls, Meraki, Cisco, CheckPoint, DHCP/DNS Management

Security
Patch Management, Vulnerability Management, SIEM, Email Filtering

General
Automation, PowerShell, Compliance, Vendor Management, Disaster Recovery, Remote Management and Monitoring Tools, Asset Inventory, IT Documentation

WORK HISTORY

SYSTEMS ENGINEER / IT MANAGER, ALTUS RECEIVABLES MANAGEMENT, KENNER, LA
06/2006 – 10/2020

Defined and managed the implementation of PCI DSS Security and SOC 2 compliance

Established Change Control Procedures. Created Security Incident Response Plan; investigated security breaches & implemented asset management systems

Managed the implementation of vulnerability and patch management

Reviewed and resolved vulnerability/penetration scans and resolved security risks

Collaborated with department leads to design long term solutions that satisfy budgetary and efficiency requirements

Trained and mentored IT professionals
Implemented and managed Active Directory and Group Policies Infrastructure
Developed and maintained backup procedures and monitoring strategies
Developed and managed relationships with service providers and vendors
Implemented and maintained SD-WAN network infrastructure
Managed Microsoft 365 migration to Exchange Online and OneDrive

COMPUTER TECHNICIAN, FOUNTAINBLEAU MANAGEMENT, NEW ORLEANS, LA

06/2005-06/2006

Install/configure new hardware/software
Troubleshoot issues with remote computer systems over phone
Run and terminate network cables as necessary
Routinely visit remote sites to perform maintenance and upgrades
Apply operating system updates, patches, and configuration changes

ORGANIZATIONS **U.S. ARMY, 06/1998-06/2001**

CERTIFICATES Microsoft Certified Systems Administrator: Messaging

REFERENCES **CHRISTOPHE GERME**

IT Director, Tricom Systems, Inc.
203 606 0685

LISA WILLIAMS

IT Manager, Altus Receivables Management
504 458 9409

SHANE SPARKS

Senior Systems Administrator, Gowrie Group
203 506 8967

Contact

www.linkedin.com/in/john-hritz-6a7932a4 (LinkedIn)

Top Skills

Azure API Management
Team Leadership
Analytical Skills

John Hritz

Technical Support Team Lead at Bellwether Technology Corporation
Mandeville, Louisiana, United States

Experience

Bellwether Technology Corporation

1 year 11 months

Technical Support Team Lead

August 2021 - Present (1 year 10 months)

New Orleans, Louisiana, United States

Promoted to team lead, which involved working tier 2 tickets, as well as managing all tier 1/2 team members.

Manage incoming tickets and delegate accordingly, monitor offline servers and delegate/rectify as needed. Provided guidance for tier 1 on how to solve issues that were escalated to me, as well as some software implementation (Azure SSO for Mimecast as an example)

Continued the same skills from my previous job: Sonicwall maintenance, Cisco switch management, as well as DHCP/DNS management on Windows server, versions 2008-2019.

Support Specialist

July 2021 - August 2021 (2 months)

New Orleans, Louisiana, United States

Tier 1 assistance, which involved Active Directory account creation/maintenance, minor network troubleshooting, application troubleshooting, as well as Mimecast administration.

Hornbeck Offshore

Vessel IT analyst

March 2017 - July 2021 (4 years 5 months)

Greater New Orleans Area

Maintained IT infrastructure both in office and vessels; Managed Cisco switches, Cisco WLC, Windows server 2016 (Mostly NTP, file servers and DNS) along with Sonicwall TZ series. Often traveled internationally onboard vessels for complete server, workstation, and network refreshes.

AutoZone

Assistant General Manager

December 2015 - March 2017 (1 year 4 months)

Greater New Orleans Area

Supervised front counter sales, assisting coworkers with daily tasks. Planned ways to meet sales quota, offer attachment items for sales to meet KPIs, and received input from coworkers about ways to improve our sales. Often either opened or closed store, assisted store manager with tasks such as scheduling and inventory management.

Advance Auto Parts

Assistant General Manager

August 2011 - December 2015 (4 years 5 months)

Mandeville, LA

- Managed store in absence of GM, created weekly schedule, set sales goals.
- Explained to team strategies on how to reach sales goals

Ryla Teleservices

Call Center Representative

May 2009 - August 2011 (2 years 4 months)

Saraland, AL

- Handled inbound customer calls about wireless phones, diagnosing hardware/software issues.
- Used ticketing software to keep track of calls

Education

West Mobile High school

high school · (2003 - 2007)

Contact

www.linkedin.com/in/brian-oettli-2b67a1124 (LinkedIn)

Top Skills

Structured Cabling

PC building

Remote User Support

Languages

English (Native or Bilingual)

Spanish (Elementary)

Certifications

CompTIA Server+

CompTia A+

SNSA

Brian Oettli

IT Support Specialist at Bellwether Technology Corporation
Luling, Louisiana, United States

Experience

Bellwether Technology Corporation

5 years 11 months

IT Support Specialist II

November 2019 - Present (3 years 7 months)

New Orleans, Louisiana, United States

Tier II handles higher priority and escalated tickets that demand the attention to detail and experience. My daily activities also include training of new hires, providing guidance for tier I, and authoring technical documentation. In addition to being a full-time phone agent for service desk calls, I'm sent on-site to build closer relationships with VIP clients. I believe in what I do and enjoy troubleshooting. If a situation calls for white glove treatment, the call goes to me.

IT Support Specialist

July 2017 - November 2019 (2 years 5 months)

Greater New Orleans Area

My daily duties include managing the company's service board by assigning all tickets that arrive by way of automated alerts or user submission; remotely troubleshooting downed servers and restoring services; contributing to the internal documentation system; acting as go-between for 3rd party support and our clients; basic firewall configuration, and solving Exchange/365 issues.

Working for this MSP has afforded me new and varied experience with more software and systems than a single environment ever could. Our service ticket reviews show my ability to deliver a high level of client satisfaction.

Computer Help for Seniors, LLC

Independent Business Owner

January 2017 - September 2017 (9 months)

Greater New Orleans Area

After 10+ years of handling various computer issues for dozens of customers as a hobby, I decided to make my business official and start a registered LLC. The name reflects my customer base and asserts that I have both the patience and ability to explain technical subjects to less adept users. I've installed single

and bridged Wi-Fi networks to service over 10 simultaneous devices in both Apple and Microsoft environments. I've also replaced laptop screens, removed rootkit infections, created wireless heat maps, configured network attached storage units, and created numerous procedural documents that help my customers. I have no plans to expand the scope of this business beyond what is managed using only my free time, but I love all my customers.

Electrical Sales Corporation

Telecommunications Technician

October 2005 - July 2017 (11 years 10 months)

Greater New Orleans Area

I meet with clients to review and consult on changes to their communication infrastructure and verify equipment specifications before performing structured cabling installations. This often includes following hospital rules and regulations and various other safety codes throughout the install. I enter equipment and material inventory, time logs, contact lists, photo documentation, and correspondence history into the CRM software to track the progress of jobs. I have a real-world working knowledge of the installation and troubleshooting of various networking infrastructures including coaxial, CAT6, fiber optic and wireless. The most recent large jobs I was responsible for includes cabling for the expansion of LCMC Health Westpark campus and the University Medical Center distributed antenna system. This required attending coordinating meetings with other vendors and department heads, recording time and materials, creating accurate documentation, and completing the goals within a set time frame. Typical other infrastructure projects I've completed are installing ISP circuits and fiber links from the provider's MDF to a customer's data room, creating wireless bridges to extend a campus area network, and splicing severed feeds due to construction damage.

The other major aspect of my position is business telephone system support. Installations require programming and testing system functionality according to the client's needs. When changes or troubleshooting steps are needed, I utilize remote management interfaces or travel onsite for support. My programming experience with phone systems include: Iwatsu, ShoreTel, and WIN.

Several times a year, I'm assigned installs of interoffice paging systems as well as A/V system setups for video conference and presentation rooms.

I have received a raise in wages for work performance every year, excluding the recession of 2008. I feel as though I have reached a growth and advancement plateau in this company due to the size.

Lantec Inc.

PC Technician

October 2004 - October 2005 (1 year 1 month)

Greater New Orleans Area

I was a field tech who supported customer site PCs, servers, printers, switches and various interconnected hardware/software. We assembled and deployed dozens of computers to rebuild entire offices after hurricane Katrina. I worked on the migration of software platforms, RAID rebuilds, WAP installs and malware removal. Also I was in charge of subcontracted jobs for Black Box Network Solutions, usually dealing with DSL installs, Wi-Fi heatmap creation, and network printer troubleshooting.

Concept Communications

CCTV Technician

June 2004 - October 2004 (5 months)

Greater New Orleans Area

My position required meeting with customers to survey their businesses for security camera coverage in order to create a materials list and time estimate. This was followed up by returning to perform the install with a helper and providing instruction on the system to the customer. The CCTV systems were PC based, and since I was the only certified computer tech, I was in charge of onsite support for any hardware failures.

We also installed CAT5 cabling in between CCTV jobs, I installed several thousand feet of network cabling in the construction of the Wal-Mart on Tchoupitoulas St.

Groupware International

Cable Technician

January 2001 - January 2004 (3 years 1 month)

Greater New Orleans Area

Averaging 3 jobs per day, I installed all necessary cabling, connections and equipment to get customers onto the HFC network maintained by Cox Communications.

Before PCs came with built-in network interfaces and USB ports, installation required the addition of PCI or ISA NICs to communicate

with the cable modem. I installed 100's of NICs and consequently had to troubleshoot the numerous "plug-n-play" and malware issues to get the customer up and surfing. I was offered a lead tech position for a new office which I turned down as it required permanent relocation out of state.

Metairie Healthcare Ctr

Dietary Aide

May 1998 - January 2001 (2 years 9 months)

First formal employment. I assisted the kitchen staff in meal prep, serving and cleanup for breakfast and lunch, Monday through Friday. This was the only non-technical position I have held. I received an award from the staff and residents for Employee of the Month in September 2000.

Education

Andrew Jackson Fundamental Magnet High School

Diploma, General Studies · (1994 - 1998)

Steve Price

New Orleans, Louisiana, United States

Email: methion@gmail.com **Phone:** (850) 933 - 4053

[linkedin.com/in/themooserooster](https://www.linkedin.com/in/themooserooster)

Summary

I'm the senior level web developer on the City of New Orleans Web Team, specializing in full-stack web development.

Languages: C#, JavaScript/HTML5, PowerShell

Experience

Senior Web Developer

City of New Orleans

Jun 2016 - Present (6+ years)

As the senior web developer for the City of New Orleans, I develop new features and processes for the city's various web properties, including Nola.Gov.

I build custom websites and features on top of the Kentico CMS platform that powers the bulk of our sites. I upgraded the the city's website portfolio and workflow from using ASP.NET WebForms and jQuery to ASP.NET Core MVC on top of .NET 6 and Vue.js

I have also come to serve a DevOps role. I use GitLab's Continuous Integration feature to set up and maintain automated deployments of the city's various web properties. I develop custom PowerShell and Desired State Configuration assets to provision and maintain our server environments. I also maintain a custom virtual development environment for the City Web Team built on top of HashiCorp Packer and Vagrant. While all of this is a matter of course in the private sector, my efforts have represented a revolutionary increase in efficiency and effectiveness in how the City of New Orleans delivers public resources online.

I have have also helped build the Web Team's capacity further by spreading my knowledge of C#, modern JavaScript, functional programming, and other concepts and best practices already widely accepted in the private sector.

Programming Bootcamp Instructor

Operation Spark

Feb 2016 - Jun 2016 (5 months)

I was responsible for teaching post-high-school adults the basics of professional software development with JavaScript in a 5-week course consisting of ~60 hrs of in class lectures and coding exercises. Topics ranged from the basics of JS syntax (conditionals, loops, etc.) all the way to lambdas and functional programming. Students were introduced to version control, submitting homework assignments via pull request, and test driven development from day one.

Web Application Developer

Surge – a Catalyte company

May 2012 - Feb 2016 (3 years 10 months)

Built full-stack custom enterprise applications for corporate clients, from small businesses to Fortune 500 companies. Projects were carried out using Agile methodologies, including regular scrums and development sprints.

Implemented data-rich, interactive, front-end interfaces via JavaScript / HTML5. Frameworks used included AngularJS, KnockoutJS, and jQuery Widget Factory.

Designed and implemented REST APIs and associated server-side middleware with C# / .NET MVC to meet the needs of the client outlined in business analysis spec documents.

Designed, implemented, and maintained MS SQL / Entity Framework databases to interface with the server software layer of web applications. This included analysis and creation of maintainable and performant database table relationships.

Interactive Developer

Florida State University

Oct 2009 - May 2012 (2 years 8 months)

Developed interactive educational media in Adobe Flash and ActionScript3 for major scientific instruments manufacturing clients, including Nikon, Carl Zeiss, and Olympus. The main focus of the interactive media was to demonstrate the inner workings of modern microscopes and optical equipment. To accomplish such, the ability to read and comprehend academic white papers on advanced scientific topics was crucial.

Performed general maintenance on educational websites for the above mentioned clients.

Created and maintained an in-house ActionScript3 code library of custom Flash components and classes for ease of use by less experienced developers.

Create 3d renderings of microscopes and other high-tech equipment using Autodesk 3DS MAX software.

Created diagrams, charts, and other graphics as needed for website articles and scientific publications.

Education

University of Central Florida

BFA, Computer Animation

2006 - 2009

Earned a fine arts degree with emphasis on the field of character animation.

Skills

C# • ASP.NET MVC • HTML5 • CSS • JavaScript • Node.js • Entity Framework • Git
Vue.js • Microsoft SQL Server • PowerShell

Contact

www.linkedin.com/in/gabriela-ochoa-delgado-a009a63a
(LinkedIn)

Top Skills

Customer Service
Microsoft Word
Microsoft Office

Certifications

Certified Associate in Project Management (CAPM)

Gabriela Ochoa Delgado

Project Manager
Gretna, Louisiana, United States

Experience

Bellwether Technology Corporation
Project Manager
October 2019 - Present (3 years 8 months)
Greater New Orleans Area

Alliant Insurance Services
Account Manager
March 2019 - October 2019 (8 months)
Greater New Orleans Area

Daul Insurance Agency, Inc.
6 years 9 months
Account Producer at Daul Insurance Agency, Inc.
June 2016 - March 2019 (2 years 10 months)

Customer Service Representative
July 2012 - March 2019 (6 years 9 months)

Sylvan Learning Center of Harvey
Center Director
July 2011 - July 2012 (1 year 1 month)

Education

Louisiana State University
Bachelor's degree, Business Administration and Management, General · (2007 - 2011)

Louisiana State University
BA, Management · (2007 - 2011)

Request for Proposals #0464

To Provide Information Technology Support Services and Supplemental Staffing for the Departments for Electronic Information Systems (EIS) and Telecommunications

SIGNATURE PAGE

The Jefferson Parish Department of Purchasing is soliciting Request for Proposals (RFP'S) from qualified proposers who are interested in providing Information Technology Support Services and Supplemental Staffing for the for the Jefferson Parish Electronic Information Systems (EIS) and Telecommunications Department.

Request for Proposals will be received until 3:30 p.m. Local Time on: August 25, 2023.

Acknowledge Receipt of Addenda: Number: #1
Number: _____
Number: _____
Number: _____
Number: _____
Number: _____

Name of Proposer: Bellwether Technology

Address: 4423 LaSalle St.

New Orleans, LA 70115

Phone Number: 504-588-2040 Fax Number 504-588-2044

Type Name of Person Authorized to Sign: Merrick Sloss

Title of Person Authorized to Sign: President

Signature of Person Authorized to Sign: Merrick Sloss

Email Address of Person Authorized to Sign: msloss@belltec.com

Date: 8/25/23

This RFP signature page must be signed by an authorized Representative of the Company/Firm for proposal to be valid. Signing indicates you have read and comply with the Instructions and Conditions.

CORPORATE RESOLUTION

EXCERPT FROM MINUTES OF MEETING OF THE BOARD OF DIRECTORS OF
BELLWETHER TECHNOLOGY CORPORATION
INCORPORATED.

AT THE MEETING OF DIRECTORS OF Bellwether Technology Corporation
INCORPORATED, DULY NOTICED AND HELD ON April 4, 2023,
A QUORUM BEING THERE PRESENT, ON MOTION DULY MADE AND SECONDED. IT WAS:

RESOLVED THAT Merrick Sloss, BE AND IS HEREBY APPOINTED, CONSTITUTED AND DESIGNATED AS AGENT AND ATTORNEY-IN-FACT OF THE CORPORATION WITH FULL POWER AND AUTHORITY TO ACT ON BEHALF OF THIS CORPORATION IN ALL NEGOTIATIONS, BIDDING, CONCERNS AND TRANSACTIONS WITH THE PARISH OF JEFFERSON OR ANY OF ITS AGENCIES, DEPARTMENTS, EMPLOYEES OR AGENTS, INCLUDING BUT NOT LIMITED TO, THE EXECUTION OF ALL PROPOSALS, PAPERS, DOCUMENTS, AFFIDAVITS, BONDS, SURETIES, CONTRACTS AND ACTS AND TO RECEIVE ALL PURCHASE ORDERS AND NOTICES ISSUED PURSUANT TO THE PROVISIONS OF ANY SUCH PROPOSAL OR CONTRACT, THIS CORPORATION HEREBY RATIFYING, APPROVING, CONFIRMING, AND ACCEPTING EACH AND EVERY SUCH ACT PERFORMED BY SAID AGENT AND ATTORNEY-IN-FACT.

I HEREBY CERTIFY THE FOREGOING TO BE A TRUE AND CORRECT COPY OF AN EXCERPT OF THE MINUTES OF THE ABOVE DATED MEETING OF THE BOARD OF DIRECTORS OF SAID CORPORATION, AND THE SAME HAS NOT BEEN REVOKED OR RESCINDED.



SECRETARY-TREASURER

8/23/2023

DATE

Request for Proposal

AFFIDAVIT

STATE OF LA

PARISH/COUNTY OF Orleans

BEFORE ME, the undersigned authority, personally came and appeared: Merrick Sloss, (Affiant) who after being by me duly sworn, deposed and said that he/she is the fully authorized President of Bellwether Technology (Entity), the party who submitted a proposal in response to RFP Number 0964, to the Parish of Jefferson.

Affiant further said:

Campaign Contribution Disclosures

(Choose A or B, if option A is indicated please include the required attachment):

Choice A _____ Attached hereto is a list of all campaign contributions, including the date and amount of each contribution, made to current or former elected officials of the Parish of Jefferson by Entity, Affiant, and/or officers, directors and owners, including employees, owning 25% or more of the Entity during the two-year period immediately preceding the date of this affidavit or the current term of the elected official, whichever is greater. Further, Entity, Affiant, and/or Entity Owners have not made any contributions to or in support of current or former members of the Jefferson Parish Council or the Jefferson Parish President through or in the name of another person or legal entity, either directly or indirectly.

Choice B there are **NO** campaign contributions made which would require disclosure under Choice A of this section.

Affiant further said:

Debt Disclosures

(Choose A or B, if option A is indicated please include the required attachment):

Choice A _____ Attached hereto is a list of all debts owed by the affiant to any elected or appointed official of the Parish of Jefferson, and any and all debts owed by any elected or appointed official of the Parish to the Affiant.

Choice B There are **NO** debts which would require disclosure under Choice A of this section.

Affiant further said:

Solicitation of Campaign Contribution Disclosures

(Choose A or B, if option A is indicated please include the required attachment):

Choice A _____ Attached hereto is a list of all elected officials of the Parish of Jefferson, whether still holding office at the time of the affidavit or not, where the elected official, individually, either by **telephone or by personal contact**, solicited a campaign contribution or other monetary consideration from the Entity, including the Entity's officers, directors and owners, and employees owning twenty-five percent (25%) or more of the Entity, during the two-year period immediately preceding the date the affidavit is signed. Further, to the extent known to the Affiant, the date of any such solicitation is included on the attached list.

Choice B there are **NO** solicitations for campaign contributions which would require disclosure under Choice A of this section.

Affiant further said:

That Affiant has employed no person, corporation, firm, association, or other organization, either directly or indirectly, to secure the public contract under which he received payment, other than persons regularly employed by the Affiant whose services in connection with the construction, alteration or demolition of the public building or project or in securing the public contract were in the regular course of their duties for Affiant; and

That no part of the contract price received by Affiant was paid or will be paid to any person, corporation, firm, association, or other organization for soliciting the contract, other than the payment of their normal compensation to persons regularly employed by the Affiant whose services in connection with the construction, alteration or demolition of the public building or project were in the regular course of their duties for Affiant.

Affiant further said:

Subcontractor Disclosures

(Choose A or B, if option A is indicated please include the required attachment):

Choice A _____ Affiant further said that attached is a listing of all subcontractors, excluding full time employees, who may assist in providing professional services for the aforementioned RFP.

Choice B There are **NO** subcontractors which would require disclosure under Choice A of this section.

[Handwritten Signature]
Signature of Affiant

8/23/23
Printed Name of Affiant

SWORN AND SUBSCRIBED TO BEFORE ME
ON THE 23rd DAY OF August, 2023.

Randy J. Boudreaux
Notary Public

RANDY J. BOUDREAU
Printed Name of Notary

24029
Notary/Bar Roll Number

My commission expires For Life.



Request for Proposal Affidavit Instructions

- **Affidavit is supplied as a courtesy to Affiants, but it is the responsibility of the affiant to insure the affidavit they submit to Jefferson Parish complies, in both form and content, with federal, state and Parish laws.**
- **Affidavit must be signed by an authorized representative of the entity or the affidavit will not be accepted.**
- **Affidavit must be notarized or the affidavit will not be accepted.**
- **Notary must sign name, print name, and include bar/notary number, or the affidavit will not be accepted.**
- **Affiant MUST select either A or B when required or the affidavit will not be accepted.**
- **Affiants who select choice A must include an attachment or the affidavit will not be accepted.**
- **If both choice A and B are selected, the affidavit will not be accepted.**
- **Affidavit marked N/A will not be accepted.**
- **It is the responsibility of the Affiant to submit a new affidavit if any additional campaign contributions are made after the affidavit is executed but prior to the time the Council acts on the matter.**
- **RFP Affidavit must be submitted in its original format prior to approval in accordance with Sec. 2-895(b) of the Jefferson Parish Code of Ordinances.**

Instruction sheet may be omitted when submitting the affidavit.