

# Village of Lake Zurich

## Managed Service Provider Request for Proposal

### **RFP Contact**

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## **1. Introduction**

The Village of Lake Zurich cordially invites you to submit a response to this Request for Proposal (RFP) for Managed Information Technology Services. The purpose of this RFP is to solicit responses and formal proposals from qualified Managed Information Technology Services Providers (MSPs) and select a single entity to provide IT services to the Village of Lake Zurich.

### ***1.1 About Village of Lake Zurich***

The Village of Lake Zurich is an established residential community that has a reputation as being the economic hub for southwest Lake County, located at the convergence of US 12/Rand Road and IL Route 22. Lake Zurich is a youthful, family-oriented community of mostly single-family homes and highly educated married couples with children that are active in sports and travel.

### ***1.2 Purpose***

With this RFP, Village of Lake Zurich is requesting information about your company and the IT products and solutions you provide as outlined in the Service Requirements section. This information will be gathered from several different organizations and used to evaluate provider options for Village of Lake Zurich.

This RFP is issued solely for information and planning purposes. This document does not commit Village of Lake Zurich to contract for any service, supply, or subscription whatsoever. Village of Lake Zurich will not reimburse any information or administrative costs incurred as a result of participation in response to the RFP. All costs associated with response will solely reside at the responding party's expense.

### ***1.3 Confidentiality Statement***

All information included in this RFP is considered confidential and intended only for use by responders. No information included in this document, or in discussions related to Village of Lake Zurich Managed Service Provider selection effort, may be disclosed to another party or used for any other purpose without the express written or verbal consent.

### ***1.4 Applicable Laws***

The contract awarded shall be governed in all respects by the laws of the State of Illinois and any litigation with respect thereto shall be brought in the courts of the State of Illinois in the County of Lake. The vendor awarded the contract shall comply with applicable federal, state, and local laws and regulations.

### ***1.5 Freedom of Information Act (FOIA)***

The Village is required by Public Act 96-542 to comply with freedom of information requests (FOIA) within five (5) business days of a record request. All contractors used by the Village

may be in possession of records covered by this act and therefore will be required to provide the Village with those records upon request and within the time frame of the Act.

Consideration will be given to requests to maintain confidentiality for certain proprietary or confidential information provided in a proposal. If the proposer desires to maintain confidentiality for specific information, the pages containing the information should be clearly marked on the proposal as "Proprietary and Confidential." In no event should all pages of the proposal be so marked. The proposal should include a separate written request clearly evidencing the need for confidentiality. The Village of Lake Zurich shall examine the proposals to determine the validity of any written requests for nondisclosure of trade secrets and other proprietary data identified. After award of the agreement, all responses, documents, and materials submitted by the proposer pertaining to this RFP will be considered public information and will be made available for inspection, unless otherwise determined by the Village of Lake Zurich. All data, documentation and innovations developed as a result of these contractual services shall become the property of the Village. Based upon the public nature of these RFP's, a proposer must inform the Village, in writing, of the exact materials in the offer that they believe should not be made a part of the public record in accordance with the Illinois Freedom of Information Act.

### **1.6 General Provisions**

The Village of Lake Zurich reserves the right to reject any or all proposals, or parts thereof, and to waive any technicality, informality or irregularity in the proposals received, and to disregard all nonconforming or conditional proposals or counter-proposals and to hold the proposal for sixty (60) days from the opening date set forth above. The Village further reserves the right in its sole discretion to award the proposal to the most responsible bidder whose offer best responds in quality, fitness and capacity to the requirements of the proposed work or usage and therefore is in the best interest of the Village

## **2. Environment Overview**

The information below outlines the general demographics of Village of Lake Zurich and our current technical environment.

**Office Locations:** Village operations are spread across 9 locations/buildings in separate locations:

Fire Stations 1, 2, 3 & 4, Community Services (contains Community Development and Public Works), Parks and Recreation Barn, Parks and Recreation Buffalo Creek, Police Station, Village Hall.

**Number of Employees:** 172 Full Time, 34 Seasonal during the summer

**Remote Employees:** 12 employees work remotely from time to time.

**Current Technical Environment:**

- **Core Hardware**
  - 3 on premises Microsoft Hyper-V Servers

- 25 on premises Microsoft Servers
- 1 cloud-based Microsoft Server
- 2 Fortigate Routers, 7 Fortigate Wifi Routers
- Fortigate WiFi networks
- 3 Cisco Routers
- HPE Storage Array (iSCSI)
- 8 Qnap Storage Arrays (SMB & iSCSI)
- **Software Systems** *(on premises unless otherwise indicated)*
  - Office 365 (cloud)
  - Sharepoint (cloud)
  - Microsoft SQL Server
  - CivicPlus & Archive Plus (cloud)
- **Connectivity**
  - Comcast Fiber Internet
  - Comcast Fiber Intranet connecting village sites
  - 2 line of site wireless links
  - Comcast Business Voice Edge
- **Remote Access / VPN**
  - Fortigate VPN Client
- **Applications** *(on premises unless otherwise indicated)*
  - Microsoft Office
  - BS&A Enterprise Software
  - Adobe Products
  - Vermont Systems Recreation Management
  - Genetec Security Suite (CCTV Door Control)
  - CCTV (Unifi, Ring, Reolink)
  - Invoice Cloud (cloud)
  - CFA Fleet Management
  - Public Safety Applications (cloud)
- **Backups, Antivirus and Remote Support Software**
  - 3 x Unitrends Hyper-V backup - UEB
  - Teamviewer
  - Kaseya Screen & Workorders (MSP Supplied)
  - Cylance End Point (MSP Supplied)
- **Workstations and other Devices**
  - 95 Windows Desktops
  - 37 Windows Laptops
  - 24 MDC used by Police and Fire
  - 2 Macbooks
  - 2 Macminis
  - 28 iPads
  - 15 iPhones

### 3. Service Requirements

As part of this RFP, Village of Lake Zurich has requirements for the following services. We realize that not every MSP will be able to provide all the services listed below, but we encourage you to respond regardless.

The MSP shall respond with two models of support:

**Full Service** – Strategic, vendor management, replacement cycle, network infrastructure, end-point protection and operational support of in-house technical staff. Ability for in-house technical staff to escalate service requests to MSP.

**Hybrid** – Network infrastructure, end-point protection and operational support of in-house technical staff. Ability for in-house technical staff to escalate service requests to MSP.

- **Help Desk Support** - The MSP should offer superior 24x7x365 Help Desk support from Tier One to Three services utilizing by industry best practice processes and procedures.
- **Server & Network System Monitoring** – The MSP must provide 24x7 monitoring of Village of Lake Zurich’s server & network system with proactive communication and escalation protocols based on the severity of any unscheduled outages.
- **Patch Management Services & Preventative Maintenance** – The MSP must provide management of critical security and system patches to all servers and systems on the network to ensure Village of Lake Zurich’s IT systems and resources are properly managed and maintained.
- **Business Continuity and Disaster Recovery** – The MSP must be able to support Village of Lake Zurich’s ability to recover based on the Recovery Time Objective (RTO) and Recovery Point Objective (RPO) agreed upon by organizational constituents. In addition, backup and redundancy should be used to support this need.
- **Remote Backup** – The MSP must execute a nightly backup plan for the critical servers, including a regularly-tested recovery process.
- **Email System Management** - Village of Lake Zurich requires the management and administration of Village of Lake Zurich’s email system for all users.
- **Antivirus, AntiSpam & Antispyware Protection** – Village of Lake Zurich is looking for solutions to defend against security threats including phishing, malware, spam, viruses.
- **On-Site Support** – When needed, the MSP should have the ability to deploy onsite resources to assist in issues which cannot be resolved through remote access to in-house systems.
- **Networking Support** - Village of Lake Zurich requires proactive management and monitoring of our switches, firewalls, routers and Wi-Fi systems, and other networking equipment as identified by Village of Lake Zurich.
- **Security Systems Monitoring** – MSP must provide proactive monitoring and management of Village of Lake Zurich’s security systems, including firewalls, intrusion prevention, secure remote access, and any implementations of advanced security solutions Village of Lake Zurich may utilize.
- **Vendor Management** – The MSP should be able to manage other vendors which may be contracted for by Village of Lake Zurich and serve as the key point of contact unless escalated.

- **Warranty and Asset Inventory Management** – Village of Lake Zurich expects the MSP to maintain a hardware and asset inventory that includes Desktops, Laptops, Servers, Printers/Scanners, Fax Machines, and notify Village of Lake Zurich of any potential service or warranty issues. The MSP must also assist with managing the lifecycle of Village of Lake Zurich's devices and maintain an equipment inventory to ensure our systems are always current.
- **Software Licensing Control** – Oversight of automatic renewal of software applications and maintenance of appropriate documentation.
- **Procurement Management** – The MSP must assist with the selection of commercially rated equipment, order placement, order tracking, shipping, equipment returns, and sourcing and ordering of replacement parts.
- **PC Deployment** – Delivery and setup of machines on-site.
- **Desktop and Laptop Support** - MSPs must include their ability to support existing and future desktop and laptop hardware. This includes maintenance and repair, replacement for failed equipment, and the acquisition and provisioning for new equipment as needed.
- **Printers, Copiers and Scanners** -The MSP must be able to support existing printers, copiers and scanner related network-printing issues.
- **Desktop Software Standardization and Software Licensing and Upgrades** – MSP must have a process for identifying standardization and management of desktop images and ensuring that staff are using current products as well as current OS and browser versions.
- **Lifecycle Management of Hardware Units** – The MSP should have processes for end-of-life notification, replacement, and asset decommissioning/disposal.
- **Break Fixes and Installation** – The MSP should offer planned and on-call break/fix services, including emergency response to server issues.
- **Move, Add, Change (MAC)** – Village of Lake Zurich is looking for the MSP to help with any changes to the location, configuration of existing equipment or software, and installation of additional equipment or software as needed.
- **Mobile Device Support** - In addition to laptops and desktops, some staff use mobile phones and tablets. The MSP will need to support secure provisioning (and ongoing support of that provisioning) of any mobile device into the company network. In the event the device is lost, the corporate mail and contact data should be able to be easily wiped from the device while preserving individual's personal information. A Mobile Device Management strategy / system recommendation should be considered and included in response to this RFP.
- **Reporting** – The MSP should provide relevant reporting not only based on their performance from a help desk perspective but also regarding system health, uptime, and assist in keeping an accurate hardware inventory to inform ongoing planning of maintenance, warranties, and refresh schedules.
- **Technology Strategy Planning** – The MSP will work with current IT staff to develop a long-term strategic technology plan. The plan will take advantage of new and existing technologies to produce a pragmatic and effective future roadmap that enables the organization to fulfill its overall mandate in the community.
- **Account Management** – The MSP must offer an internal escalation process in tandem with Village of Lake Zurich to ensure the ability to have multiple points of contact available if needed depending on the items or issue encountered.
- **Project Management** – The MSP should be able to offer project management and technical engineering resources to assist with technical projects as identified by the MSP or Village of Lake Zurich.

- **Solution Design** – The MSP must provide solution packages (e.g., hardware, software, licensing) and associated consolidation of data.
- **Service Levels** – The MSP should identify service level agreements or objectives and report back on a regular basis to Village of Lake Zurich on their ability to meet these agreements or objectives.
- **IT Policy Review and Development** – The MSP should be able to assist in the development of customized policies related to the use of technology.
- **Hosting** - The MSP should offer services relative to hosting or co-location of equipment, either directly or through partners.
- **Onboarding and Offboarding Staff** - The MSP must have process and procedure in place to onboard or offboard team members in a timely and efficient manner.
- **Compliance** – The MSP must use systems that comply with published Payment Card Industry Security (PCI) Standards. In addition, the MSP should also support rules and regulations as provided by relevant governing organizations as identified by regulatory or grant based requirements.
- **Scalability** – The MSP must be able to offer a model where scaling up or down from a systems and cost perspective is simple and nimble.
- **Multi-Factor Authentication (MFA)** – MSP must be able to provide and manage a Multi-Factor Authentication (MFA) solution to provide an easy-to-use method to verify user identities at login and to protect logins with multi-factor authentication.
- **End-User Security Awareness Training** – The MSP should offer Security Awareness Training to teach [Village of Lake Zurich's] staff and employees about current threats, terms, standards, and compliance to help them avoid a security incident.
- **Vulnerability Testing** - The MSP should offer vulnerability tests, both internally and externally, to determine what flaws and potential threats exist from the outside, or perimeter, of [Village of Lake Zurich's] business network.
- **Managed SOC-as-a-Service** - The MSP should offer Managed SOC-as-a-Service to monitor [Village of Lake Zurich's] environment and ensure proactive detection and response to threats, intrusions and attacks.
- **Special Projects** – Server replacement, desktop image deployment as part of lifecycle management.

## 4. Response Process

### ***4.1 Notification of Intent to Respond and Clarifying Questions***

Please indicate your intention to respond to this RFP by email to the Primary RFP Contact listed below by the *Intent to Respond and Questions Due* date outlined below. In addition, please provide the contact details of the individual responsible for coordinating your RFP response. At the same time, we ask that you submit any clarification questions regarding the RFP.

### ***4.2 Primary RFP Contact***

Please direct all inquiries regarding to this RFP to:

J. Michael Duebner

Assistant Village Manager



[Michael.Duebner@LakeZurich.org](mailto:Michael.Duebner@LakeZurich.org)

847-540-1690

### **4.3 Response Delivery Instructions**

Village of Lake Zurich requires responses to this request for proposal to be delivered digitally. You may attach documentation to support your answers, if necessary.

Please submit all responses via electronic delivery no later than **Friday, August 22, 2025 by 9 pm** to:

J. Michael Duebner

Assistant Village Manager

[Michael.Duebner@LakeZurich.org](mailto:Michael.Duebner@LakeZurich.org)

Any response received after the delivery date specified, will not be considered without prior written or electronic approval.

Please complete the attached forms (Attachment A and Attachment B), a proposal document, pricing breakdown, and a version of any master services agreement or other contract that would be utilized if chosen.

## **5. Selection Criteria & Process**

### **5.1 Selection Criteria**

Village of Lake Zurich will evaluate the responses based on multiple criteria and will select the best overall solution to fit its needs. Village of Lake Zurich is not obligated to select the lowest price bidder. All responses will be evaluated in the following areas:

- Completeness of solution
- Expertise and experience with government clients
- Demonstrated customer service quality and support for Tier 1 through 3 levels of support
- Previous relevant experience with similarly sized organizations
- Vendor strength and stability
- Account management
- Reporting capabilities
- Financial considerations

### **5.2 Selection Process**

All responses will be evaluated as received and included in the following process:

- Review and scoring of the responses, as well as clarification of information as deemed necessary by the evaluation team.
- Identification of 2–3 final candidates to conduct in-depth review of capabilities, including on-site interviews and presentations.
- Conducting of site visits and/or reference calls as deemed appropriate by the evaluation team.

### **5.3 Finalist Presentations**

Our intention is to hold presentations/demonstrations with one or more firms as indicated in the *Key Dates* table. The presentations will be held at Village of Lake Zurich at 70 E. Main Street, Lake Zurich, IL 60047 and we will try to provide the finalist firms with as much advance notice as possible.

## **6. Key Dates**

Below is a general timeline outlining the process steps with estimated dates for each step of the process. By participating in the RFP process, MSPs agree that they can adhere to the following general timeline and the meeting times they reserve through this process.

<b>Task</b>	<b>Completion Date</b>
RFP Made Available Online	7/30/2025
Intent to Respond & Questions Due from MSPs	8/13/2025
Responses Due from MSPs	8/22/2025
Response Analysis / Finalists Selection	8/27/2025
Finalist Presentations	9/2/2025
MSP Selection / Award Contract	9/15/2025
MSP “Go Live”	October/November 2025

### **Thank You**

Village of Lake Zurich looks forward to reviewing your response and would like to thank you in advance for your participation. The Managed Service Provider selection project is very important to our continued success and represents a major focus of effort for Village of Lake Zurich. We appreciate and value your input, expertise, and feedback.

# Attachment A

## RFP Response Form: Corporate Information

Please provide the following information about your company.

1.0 Company Profile		
1.1	Company Name	
1.2	Company Address	
1.3	Contact Information (Party responsible for responding to this RFP)	
1.4	Company Webpage	
1.5	Main Products / Services	
1.6	Main Market / Customers	
1.7	Number of years in the Market	
1.8	When did you first start providing similar solutions?	
1.9	Company location(s)	
1.10	Number of Employees	
1.11	Number of Employees in Account Management	
1.12	Number of Employees in Technical Support	
1.13	Notable Acquisitions	
1.14	Key Business Partnerships	
2.0 Financial Information		
2.1	Previous year gross revenue	
2.2	Previous year net income	
2.3	Return on investment	

# Attachment B

## RFP Response Form: Questions

Please provide responses to the questions below to the best of your ability.

1.0 General	
1.1	<b>Q. What are the general types of organizations your clients represent?</b> A.
1.2	<b>Q. Why do you believe that you are a good fit with our organization?</b> A.
1.3	<b>Q. Describe your onboarding/implementation process and approach if you were selected?</b> A.
1.4	<b>Q. Do you conduct QBRs and what is the nature of those meetings?</b> A.
1.5	<b>Q. How do you typically work with IT Management at clients who have staff members?</b> A.
1.6	<b>Q. What do you feel your overall strengths and differentiators are?</b> A.
1.7	<b>Q. Do you serve clients with 24 X 7 requirements?</b> A.
1.8	<b>Q. What services do you offer besides the core services of a Managed Service Provider?</b> A.
1.9	<b>Q. What type of training do you offer either during onboarding or ongoing?</b> A.
1.10	<b>Q. What do you feel are your biggest hurdles to a successful relationship?</b> A.
1.11	<b>Q. What training resources are available for team members?</b> A.
1.12	<b>Q. What type of general expertise can you provide in key technology areas?</b> A.
1.13	<b>Q. What differentiates your organization from your competitors in the marketplace?</b> A.

<b>2.0 Processes</b>	
<b>2.1</b>	<b>Q. Do you use in-house or contracted resources for services?</b>
	A.
<b>2.2</b>	<b>Q. Describe your process for migrating Village of Lake Zurich to your organization?</b>
	A.
<b>2.3</b>	<b>Q. What Village of Lake Zurich resources would you require (i.e., information, data, staff resources, communication) during initial migration and on an ongoing basis?</b>
	A.
<b>2.4</b>	<b>Q. Outline the methods by which clients can access you (i.e. online, by phone, etc.).</b>
	A.
<b>2.5</b>	<b>Q. Describe the escalation and account management process including strategy and planning meetings.</b>
	A.
<b>2.6</b>	<b>Q. Where is/are your support center(s) located?</b>
	A.
<b>2.7</b>	<b>Q. How involved is your team with creating project plans/testing during technical projects?</b>
	A.
<b>2.8</b>	<b>Q. Do you follow ITIL or other processes aligned with industry standard practices?</b>
	A.
<b>2.9</b>	<b>Q. Do you participate in drills or tests i.e. DR, etc.?</b>
	A.
<b>2.10</b>	<b>Q. How do you notify users of maintenance windows or system outages?</b>
	A.
<b>2.11</b>	<b>Q. What types of diagrams would you typically create/maintain?</b>
	A.
<b>2.12</b>	<b>Q. Do you offer knowledge bases for common issues and how are they utilized?</b>
	A.
<b>2.13</b>	<b>Q. What is your willingness or ability to support the security systems, phone systems, audio/visual systems?</b>
	A.
<b>2.14</b>	<b>Q. How often do you conduct DR testing?</b>
	A.

<b>3.0 Technology</b>	
<b>3.1</b>	<b>Q. What types of monitoring agents would you use for end user devices?</b>
	A.
<b>3.2</b>	<b>Q. What is the back-end help desk system you use?</b>
	A.
<b>3.3</b>	<b>Q. Do you offer managed firewalls or other managed technology?</b>
	A.
<b>3.4</b>	<b>Q. Do you offer MDM or other mobile management technology?</b>
	A.
<b>3.5</b>	<b>Q. Do you offer a SIEM or other security-based technology?</b>
	A.
<b>3.6</b>	<b>Q. Do you have tools to provide system uptime metrics?</b>
	A.
<b>3.7</b>	<b>Q. What tools do you use for network monitoring?</b>
	A.
<b>3.8</b>	<b>Q. What tools do you use for system monitoring or general health level of end user devices?</b>
	A.
<b>3.9</b>	<b>Q. Do you offer or partner for laptop encryption?</b>
	A.
<b>3.10</b>	<b>Q. If hosting/co-location is an option please describe details of option i.e. services, vendor partners, etc.</b>
	A.

<b>4.0 Support</b>	
<b>4.1</b>	<b>Q. Describe fully your technical support options including the assistance request process, escalation process, support hours, response times, staffing levels, staff expertise, and physical location of the help desk.</b>
	<b>A.</b>
<b>4.2</b>	<b>Q. Please provide details on your standard reporting capabilities.</b>
	<b>A.</b>
<b>4.3</b>	<b>Q. Describe any documentation and support (e.g., user manuals, online help, interactive demos, web-based seminars, and online knowledge base) that will be available, both from the technical perspective and the end user perspective.</b>
	<b>A.</b>
<b>4.4</b>	<b>Q. What options are available for user training and technical training that may be required by staff?</b>
	<b>A.</b>
<b>4.5</b>	<b>Q. Describe any user groups, websites, newsletters, conferences, or any other means you support for sharing information and soliciting service feedback.</b>
	<b>A.</b>
<b>4.6</b>	<b>Q. How do you monitor customer satisfaction and quality assurance on an ongoing basis and how might we benefit from this process?</b>
	<b>A.</b>
<b>4.7</b>	<b>Q. The Village of Lake Zurich user base varies considerably in its level of technical sophistication. Please describe your experience in successfully supporting users that may be remote and possess limited technical skills.</b>
	<b>A.</b>

<b>5.0 Pricing &amp; Contracts</b>	
<b>5.1</b>	<b>Please attach cost estimates and worksheets to support these estimates if applicable. Itemize non-recurring and recurring costs. Recurring costs should be quoted as per user per month costs. Other pricing models may be provided as an option.</b>
<b>5.2</b>	<b>Please attach a Master Services Agreement or other legal documents beyond a proposal which accompany a proposal.</b>

<b>6.0 References</b>	
<b>6.1</b>	<b>Please provide at least three references for customers with similar operations to the proposed solution. Include contact names, phone numbers, email addresses and industry.</b>