

Annex 1: Operational Support

The Operational Support model will cover proactive management of Plan's Microsoft Azure, Microsoft 365, and legacy on-premises (in-Azure) environments, ensuring governance, compliance, cost optimisation, resilience, and security across all workloads. This includes continued support for technologies such as Exchange hybrids, domain controllers, and certificate services alongside cloud-based platforms. The requirements for Operational Support include the following areas:

Service Initiation

- Structured onboarding and assignment of account team.
- Transition plan including discovery, knowledge transfer, runbooks, and operational readiness checks.
- Configuration of monitoring, management, and cost optimisation tools.
- Setup of access controls, escalation procedures, and change advisory processes.
- Initial financial operations review (FinOps) to baseline reporting and budgets.

Cloud Support & Customer Success

- 24/5 support for incidents and service requests.
- Proactive and reactive incident management.
- Clear escalation paths to technical and management levels.
- Continuous platform and workload monitoring.
- Provision of Technical Account Management and Service Delivery Management.
- Monthly service reporting, including KPIs, security, governance, and cost insights.
- Vendor escalation and coordination when required.

Financial Operations (FinOps)

- Billing support and cost optimisation recommendations.
- Implementation of cloud cost management tooling.
- Generation of custom billing reports.
- Budget setting and configuration of automated alerts.

Security

- Monitoring and support for private connectivity e.g. VPN endpoints in Azure.
- Firewall, WAF, and NSG monitoring and configuration this should include monitoring of the devices/service - monitoring of logs and SIEM is handled by a partner.
- Security health checks against CIS benchmarks with remediation recommendations.
- Support for authorised third-party penetration testing.

Cloud Management

- Management of all aspects of Azure networking.
- VM OS patching configuration, deployment, compliance and reporting.
- Deployment of new spokes, resources, and workloads.
- Azure Policy and governance compliance reviews.
- Reporting and remediation of tagging and governance non-compliance.
- Azure Hybrid Use Benefit (AHUB) compliance tracking.
- Infrastructure-as-Code (Terraform) deployments.
- Proactive guidance and remediation on new or deprecated Azure features and services.
- Architecture review and recommendations.
- Onboarding of new subscriptions created.

Backup & Disaster Recovery

- Configuration and monitoring of Azure backup and disaster recovery tasks.
- Reporting on backup/DR success and failures.
- Escalation and remediation support for identified issues.
- Regular restore and DR test tasks to validate restore job integrity.

Examples of Pieces of Work That Currently Are Undertaken

Hybrid Use Benefit - Ensuring that all VM's are using hybrid use benefit aligned to the correct licensing procured by Plan.

Azure subscription management – ensuring that VM's are in the right patching and backup groups. Correct tagging is in place.

Annex 2: Augmented Support

Augmented Support will provide direct access for Plan's engineers to senior expertise across Microsoft, Azure, and identity platforms, bypassing traditional first/second/third line barriers. The requirements for Augmented Support include:

Scope of Augmented Support

- Provision of second- and third-line support across Microsoft 365, Azure, Active Directory, and associated applications.
- Acting as an extension of Plan's technical team, supporting issue resolution, configuration, migrations, and capability uplift.
- Direct, senior-level escalation channels available to Plan engineers.
- Support delivered remotely with flexibility for on-site presence where necessary (e.g. discovery sessions or major incident reviews).

Environment Coverage

- Microsoft 365: Exchange Online, SharePoint Online, OneDrive, Teams, Groups, Power Platform, Purview, Intune, Graph API, admin portals.
- Azure: Entra ID, Azure Virtual Machines, Storage, Key Vault, App Services/Functions, Monitor/Log Analytics/Sentinel, Networking, Policy, SQL, Data Factory, Synapse.
- Active Directory and related infrastructure: AD DS, AD CS.
- Legacy on-premises (in-Azure) technologies: Exchange hybrids, domain controllers, and certificate services.

Engagement Expectations

- Proactivity in highlighting opportunities to optimise, secure, and modernise Plan's environment.
- Flexibility to work with internal teams and alongside other specialist partners (e.g., ERP, BI, data warehouse).
- Acting as Plan's first point of call for advice on new technologies and Microsoft roadmap developments.

Capacity

Based on current usage, augmented support is expected to equate to around 100 days of consultant-level support per year, with flexibility in the mix of skills applied depending on requirements. This capacity will serve as the benchmark for anticipated annual consumption.

Examples of Pieces of Work That Currently Are Undertaken

Upgrading exchange servers – project based activity to upgrade exchange servers and all connectors to the latest versions ensuring that our FIM/MIM services are highly available.

Identity – providing a solution to replace FIM / MIM with OKTA and an alternative GAL solution(s) for the organisation.

Office 365 data management – implementing an archiving solution to match Plans data retention policy. Looking at Microsoft Teams group management to implement policies to create 'groups' and an associated expiration process.

Annex 3: In-Scope Technologies

Microsoft 365

- Exchange Online
- SharePoint Online
- OneDrive for Business
- Microsoft Teams
- Microsoft 365 Groups
- Power Platform (Power Apps, Power Automate, Power BI)
- Microsoft Purview (Compliance and Data Lifecycle)
- Intune (Endpoint Management)
- Graph API
- Microsoft 365 Administration Portals

Microsoft Azure

- Entra ID (Azure Active Directory)
- Azure Virtual Machines
- Azure Storage (Blob, File, Disk)
- Azure Key Vault
- Azure App Services and Functions
- Azure Monitor, Log Analytics, and Sentinel
- Azure Networking (VNets, NSGs, VPN)
- Azure Policy
- Azure SQL Database
- Azure Data Factory
- Azure Synapse Analytics
- Azure Hybrid Use Benefit (AHUB)
- Terraform for Infrastructure-as-Code deployments
- PowerShell for administration and automation
- Azure DevOps for CI/CD and infrastructure management

Identity and Access

- Entra ID
- Active Directory Domain Services (AD DS)
- Active Directory Certificate Services (AD CS)
- Azure AD Connect for hybrid identity
- Hybrid Identity configurations

Security and Compliance

- Firewall management (Azure Firewall, WAF, NSGs)
- Security monitoring and compliance against CIS benchmarks
- Backup and disaster recovery solutions within Azure
- Third-party penetration testing support

Annex 4: Overview of Plan's Existing Technology Architecture

Organisational Context

Plan International is a global non-governmental organisation working to advance children's rights and equality for girls. Its operations span more than 20 national offices and 45 country offices, along with liaison offices at the UN and EU, as well as global head offices. Through these structures, Plan supports over a million children's programmes focused on tackling poverty and promoting child rights.

Plan also operates a mature Microsoft 365 environment with over 15,000 users, 17,000 Teams, and 26,000 SharePoint sites. Vendors are expected to demonstrate support capabilities across Exchange Online, Teams, SharePoint, OneDrive, Power Platform, Purview, and Intune, including examples of how they have supported complex or large-scale Microsoft 365 environments.

The following section contains an overview of Plan International's technology architecture, including both custom and off-the-shelf applications and the associated platforms they run on. This is not considered a detailed technical specification but is intended to provide suppliers with an understanding of the breadth and scale of Plan's operations.

Applications Overview

This section lists all applications from the value stream with a brief description and their associated value stream.

Manage Enterprise Finances

- *SAP ERP (financials)*: ERP, primarily covering financial management
- *SAP BW (business warehouse)*: Data warehouse to support reporting from SAP ERP
- *SAP Business Objects*: Reporting development and delivery tool
- *Netweaver Open Hub*: Data extraction tool to extract data from SAP
- *SolMan Abap (PSM)*: Application lifecycle management tool to manage SAP systems
- *SolMan Java (PSJ)*: Application lifecycle management tool to manage SAP systems
- *SAP BPC*: Business planning, consolidation, forecasting

Enable Enterprise Governance and Structure

- *HRIS*: HR management system for all Plan staff
- *ASM - Compliance link*: Anti-terrorism security check for employees, partners and vendors
- *CAMMS - Incident reporting*: Incident reporting and management

Secure and Manage Strategic Partnerships

- *ChildData*: Management of sponsors and their relationships
- *CD-PET*: Manage photo metadata linked to sponsorship

Deliver Digital Capabilities and Innovation

- *PowerBI*: Reporting and analytics tool, replacing SAP Business Objects
- *SQL Server Data Warehouse (DW)*
- *Okta*: Identity management including single sign on
- *Active Directory*: User security and role management
- *Vfire*: Service management solution
- *Condeco*: Booking desks and office space at GH

Deliver Strategic Initiatives and Programs

- *AmplImpact*: Monitoring and evaluation functionality for Plan projects; project management functionality to be implemented alongside D365
- *TerraMar Tracpoint*: GPS tracking of vehicles

Enhance Workforce Collaboration and Efficiency

- *SharePoint*: Document repository
- *Teams*: Collaboration tool for team management, document control and conferencing
- *Mural*: Collaborative digital whiteboard
- *Office 365*: Standard suite of office productivity tools
- *DeepL*: Translation tool
- *E-sign*: Electronic signature
- *Media Bank*: Digital asset management of primary assets
- *Sectigo*: Certificate Manager

Annex 5: SLAs and Service Level Requirements

The partner will be required to adhere to defined service levels for response and resolution of incidents, aligned to industry standards and Plan's operational needs. The following table summarises expected SLA commitments:

Priorit y / Severi ty	Impact	Response Target	Resolution Target	Service Hours
Priorit y 1 – Critic al	System-wide outage; unable to perform primary functions	1 hour (initial response); remote access within 2 hours	To be agreed in contract (typically within 4–8 hours depending on context)	24x5 including public holidays
Priorit y 2 – High	Major business unit, department or significant subset of users impacted	2 hours	Typically next business day or as agreed	07:00–19:00 UK local time, Mon–Fri (excl. public holidays)
Priorit y 3 – Moder ate	Limited functions impaired and/or workaround available	4 hours	Within 3–5 business days or as agreed	As above
Priorit y 4 – Low	Minor inconvenience, single/small subset of users	8 hours	Within 10 business days or as agreed	As above

Additional SLA Considerations

- Escalation paths must be defined, from technical lead to service manager to executive sponsor.
- Disaster Recovery: The supplier will support ad hoc recovery tests within a predefined annual limit, and assist with day-to-day recoveries of a reasonable scope (e.g., file-level or application-level recovery). Full data centre recoveries are out of scope unless separately contracted.
- Security Incidents: Security issues will be handled as normal incidents. However, suppliers may be expected to work in coordination with Plan's specialist security partners where required.
- Patching: It is expected that the supplier will provide a patching solution. This may utilise existing Azure-native tools or, if the supplier proposes an alternative platform, this must be delivered as part of the contract.
- Reporting: Monthly SLA compliance reporting, including KPIs (first-time fix rate, mean time to resolution, patch compliance, DR test results).

Annex 6: Design Workshop and Presentation Requirements

Following the release of the ITT, shortlisted suppliers will participate in two interactive stages beyond their written submission.

1. Design Workshop

Suppliers will be invited to a **two-hour design workshop**. This is intended as an iterative, bilateral conversation between Plan International and the vendor. It is **not** a sales pitch and it is **not** a simple Q&A session. The purpose is to:

- Explore ideas, approaches, and options in depth.
- Allow both sides to test assumptions and refine understanding.
- Enable vendors to gather the information they need to provide the most accurate and relevant tender response.

The session will be expected to be led by the supplier, not by Plan. Vendors should structure the workshop to make the best use of the time, drawing out insights, clarifications, and potential solution areas.

The behaviour and approach of the vendor during this session will form part of the overall evaluation, reflecting how they collaborate, problem-solve, and engage in a partnership dynamic.

Scoring: This session will be scored explicitly as though it were a requirements-gathering workshop. Vendors will be assessed on their ability to elicit, understand, and refine requirements in a collaborative setting. Any attempt to treat the session as a sales pitch will be considered a failure at this stage and reflected negatively in scoring.

2. Presentation Requirements and Expectations

Shortlisted suppliers will also deliver a formal presentation as part of the evaluation process. This will be an opportunity to demonstrate both your understanding of Plan's requirements and your capability as a long-term strategic partner.

We are looking for more than a restatement of the written tender response. This session should provide **insight, foresight, and organisational perspective**.

Presentation Focus Areas

Suppliers should address the following:

1. Understanding of Plan

- Your understanding of Plan International's operating model, global challenges, and federated structure.
- How your proposed service approach aligns with our environment and ways of working.

2. Service Delivery Approach

- How your organisation would deliver and govern the services described in this ITT.
- How you ensure resilience, quality, and continuous improvement in a global context.
- How you collaborate with other vendors and internal teams in multi-partner ecosystems.

3. Organisational Insights

- Where your organisation is currently investing in skills, partnerships, and technology capabilities.
- What you see as the most significant industry trends shaping IT operations over the next 3–5 years (e.g., AI, automation, Zero Trust, multi-cloud, sustainability, data governance).
- Your interpretation of market perspectives (e.g., Gartner Hype Cycle, Forrester trends) and how they are relevant to Plan.
- Examples of how you have provided thought leadership and advisory services to other global clients.

4. Strategic Fit

- Why your organisation is a strong long-term fit for Plan.
- How you will act as a **primary IT service partner**, not just a delivery supplier.
- How you will proactively bring innovation, opportunities, and risks to our attention.

Format and Expectations

- Design Workshop: 2 hours, collaborative and vendor-led.
- Presentation: Maximum 60 minutes, followed by Q&A.
- Presentations should be delivered by both senior leadership and key operational contacts who would work with Plan.
- Supporting materials (slides, demos, white papers) may be shared but are not required.