

IT Managed Services Service Requirements

Summary

Social Investment Business (SIB) intends to appoint an IT Managed Services Provider for a contract running from 1 February '27. This would include our main helpdesk service and strategic support with cybersecurity and M365 configuration and development. We are open to a contract of up to three years.

This document provides background on SIB, the current IT configuration and outline requirements. However, we are open to discussing the requirements through the clarification sessions at later stages, and to receive challenge on any of the assumptions or recommended approaches.

We've tried to strike a balance between obtaining the right information to make good decisions and being mindful of not over-burdening interested organisations with unnecessary steps at the early stages of selection.

Timescale & Process

Suitably experienced and qualified providers are asked to submit a proposal (maximum six pages), demonstrating they can deliver the core services securely and effectively and setting out their proposed approach.

SIB will select up to six providers to take part in discovery workshops with the opportunity to clarify any outstanding questions for us, fully understand the existing setup and scope of the service to help finalise and update proposals.

The three highest-rated providers based on the final responses will take part in a selection panel (Around 5 Directors and Staff from across SIB) before we make a final appointment.

We'd like to receive all responses back by 11 November.

Discovery workshops will be scheduled for the week of 23 November.

The selection panel will be held in mid-December.

What does good look like?

A provider able to resolve day-to-day tickets on first contact, who proactively suggests improvements to configurations and policies based on issues experienced by our team or on emerging best practice.

A comprehensive and smooth approach to managing our physical devices, with a viewable, automated asset register.



A trusted partner and advisor on CyberSecurity regularly sense-checking our approach against industry standards and able to call on an effective incident-response service should it be needed.

High standards and proven certification for their own CyberSecurity.

Background on Social Investment Business.

At Social Investment Business, we use finance to build stronger communities and a fairer society.

Through a mix of funding, investment and innovation, we back the organisations that make up the social economy – those tackling inequality, improving lives, and driving positive change every day. Our role is to provide the support, flexibility, and trusted partnership they need to thrive.

As one of the UK's largest social investors, we've deployed over £0.8bn in loans and grants since 2002. We've supported more than 6,000 charities and social enterprises to build a fairer society, while using our expertise to research, innovate and advocate for the sector.

Driving our work are three core priorities: unlocking energy resilience, transforming public services, and strengthening community assets like housing, community buildings and land.

We have an ambitious 5-year technology strategy to help drive our impact even further

Background on our IT Infrastructure

SIB has 80 licenced Microsoft users with charity Business Premium Licences. We have no office base. All staff are primarily remote. We anticipate the number of users may increase up to around 120 in early 2027.

We Use Entra as our main Directory, Intune and Autopilot for Endpoint Management.

Our applications, endpoint configuration and policies are set centrally through Intune.

SIB has CyberEssentials certification and uses Microsoft Defender as our main security platform. We have a basic XDR and Microsoft Sentinel set up.

Entra acts as Identity Provider for a number of other SaaS applications.

We are open to recommendations for a Backup Solution as part of the service.

Our main productivity and collaboration tools are Microsoft 365, especially Outlook, Teams and SharePoint.

Currently 40 – 50 tickets per month. Most of these are relatively low-level issues and a summary of ticket subjects can be shared during later stages.

We have a current MSP, and a good in-house understanding of our current tenant configuration.

We are keen to improve the service as outlined here. We anticipate a short handover period to manage transition to any new provider.

We have a range of M365 licences on differing renewal periods which would need migrating over time.



Out of Scope

Salesforce, Box, Tableau and DocuSign are our other main business systems. These are all covered by an internal team and not part of MSP services. Though some support may be needed to maintain official integrations and Entra Id configurations.

Requirements

Helpdesk

Single helpdesk contact for staff including by phone between 8 – 6 ideally.

A clearly defined Joiners, Movers and Leavers process to be reviewed and agreed as part of set up (building on existing processes and with particular note to device management below).

Low-complexity tickets (new user requests, changes in group memberships, access to tools) ideally resolved on first contact. Any recurring issues highlighting training needs or system configuration should be escalated with the account manager and internal team.

Physical Device Management. SIB uses Intune and Autopilot for configuration which is working well. With no central office space we need the MSP to securely store and manage devices while between users and ability to arrange couriers to dispatch to new starters plus collection/drop off at local post office at similar for returns. MSP should manage an asset-management system to cover gaps in Intune functionality (e.g. when devices are wiped or reset) and provide accurate reporting of device assignments and location.

Security

SIB uses Microsoft Defender, including Endpoint Detection and Response (EDR) and Advanced Threat Protection. We are CyberEssentials certified

Within the contract we would like to ensure sentinel and other alerts are triaged and acted upon appropriately to reduce risk, and that recommended changes or best practice from Microsoft are implemented as part of a planned cycle by the MSP, working with the internal team. We would like to include an incident-response service should we suffer an attack or breach.

At an early stage of the contract we would like the MSP to review our security policies and settings and support us to update our Business Continuity, Incident Response and Recovery Plans.

Strategic Development

We would like to ensure regular conversations with our account lead or similar on system development, incoming changes to licences or software. The partner would be highlighting risks and



opportunities based on their wider expertise in the sector, developing Microsoft best practice and the changing security landscape.

More complex consultancy support could be block-purchased, scheduled in as part of the contract or spot-purchased. It would be good to understand the timescales for initiating any such consultancy work.

Please submit an outline proposal – a maximum of six pages, including the proposed approach and indicative costs (subject to audit of existing setup and SLA definitions).

Next Steps

Please submit proposals via email to itsupport@sibgroup.org.uk no later than 11 November (earlier responses appreciated). To help us manage the process, please do not contact individuals separately via email or LinkedIn.

Early critical clarification questions can be submitted via the same address. Responses will be added to this document and updated on our website and via LinkedIn.

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