TERMS OF REFERENCE

SERVICES OF AN IT COMPANY TO CONFIGURE AND DEPLOY ENDPOINT MANAGEMENT

1. **BACKGROUND**

   During the first quarter of 2023, the Tourism Promotions Board (TPB) began rolling out Microsoft 365, the cloud-based version of Microsoft Office, to replace the old 2016 version of Microsoft Office installed in office-issued computers. This also unlocked other cloud features and services such as Microsoft Azure Active Directory (AD) to manage user identity.

   To further modernize its workplace and streamline the configuration of computers, the TPB will be deploying an endpoint management software. It shall be based on Microsoft Intune, to leverage the existing Azure AD. Expected benefits include increased device compliance as well as freeing up valuable human resources of the MIS Personnel resulting from automating the configuration and deployment process of endpoint devices.

2. **OBJECTIVES**
   2.1. To streamline and automate the process of deploying office-issued computers
   2.2. To enable to rollout configurations and policies to endpoint devices remotely
   2.3. To enable end-users to install pre-approved applications/software without the need for IT administrator's intervention

3. **SCOPE OF WORK / SERVICES**
   The scope of activities shall include the following:

   3.1. **Discovery Phase**
       3.1.1. Conduct project kick-off to introduce the company, the project team, the proposed solution, and the project constraints
       3.1.2. Define requirements, workplan, and expectations
       3.1.3. Conduct pre-requisites and remediation plan
       3.1.4. Conduct Intune Workshop

   3.2. **Assessment Phase**
       3.2.1. Evaluate the existing TPB environment and its configuration
       3.2.2. Provide recommendations for optimizing Intune settings and policies
       3.2.3. Ensure alignment with organizational goals and best practices
       3.2.4. Provide a report with findings, recommendations, and roadmap
       3.2.5. Document existing Intune configurations
       3.2.6. Review existing device inventory and user assignments
       3.2.7. Evaluate compliance policies and settings
       3.2.8. Review conditional access policies

3.2.9. Analyze existing policies for device management, app management, and user access

3.2.10. Assess configuration settings for device enrollment and app deployment

3.2.11. Create an inventory of all enrolled devices and managed applications

3.2.12. Identify any unsupported or non-compliant devices

3.2.13. Evaluate end-user experience with Intune, including enrollment and application access

3.2.14. Identify any unsupported or non-compliant devices

3.2.15. Evaluate end-user experience, including enrollment and application access

3.2.16. Identify any usability or training issues

3.2.17. Provide recommendations for optimizing policies and settings

3.3. Build Phase

3.3.1. Enroll endpoint devices to Microsoft Intune which shall include Windows, Macintosh, iOS, and Android devices

3.3.2. Define configuration, access, and compliance policies based on industry standard practices and recommendations raised in the previous phases

3.3.3. Create policies for deploying company-approved applications to targeted devices

3.3.4. Enforce policies to targeted devices and validate roll out status

3.4. Project Sign-off

3.4.1. Conduct project transition

3.4.2. Provide at least two (2) knowledge transfer sessions (1 hr. per session)

3.4.3. Provide documentation of the project

3.4.4. Conduct post-implementation monitoring for up to ten (10) business days

4. REQUIRED BIDDER QUALIFICATIONS

4.1. Must be an IT company operating for at least five (5) years.

4.2. Must have handled at least three (3) similar projects within the last five (5) years.

4.3. Must be an Azure Expert Managed Service Provider. Bidders shall submit a certification or equivalent document for validation purposes.

4.4. Must be designated as Modern Work Solutions Partner by Microsoft. Bidders shall submit a certification or equivalent document for validation purposes.

4.5. Must be an ISO 9001:2015 certified company

5. REQUIRED FEATURES, FUNCTIONALITIES, AND TECHNICAL SPECIFICATIONS

5.1. Device Management

5.1.1. Enroll devices to monitor compliance and enforce configurations

5.1.2. Enable/disable features based on set standards or policies

5.1.3. Compatible with Windows, Macintosh, iOS, and Android

5.1.4. Trigger remote wipe of device

5.1.5. See enrolled devices and get an inventory of devices accessing company resources

5.1.6. Enforce encryption

5.1.7. Enforce multifactor authentication

5.1.8. Remove organization data if a device is lost, stolen, or not used anymore

5.1.9. Configure devices to meet organization security standards

5.2. Application Management
5.2.1. Configure apps to start or run with specific settings enabled
5.2.2. Update existing apps already installed on the device
5.2.3. Add and assign mobile apps to user groups and devices
5.2.4. Do a selective wipe by removing only organization fata from apps
5.2.5. Define/limit which actions users can do with organization data even when connected to a personal device
5.3. Compliance and Conditional Access Management
5.3.1. Enforce minimum compliance before endpoint devices can connect and access organizational resources
5.3.2. Enable disable features based on defined conditions or device compliance
5.4. Deployment Management
5.4.1. Create groups and assign devices and policies to groups
5.4.2. Define pre- and post-deployment procedures and automate the process during roll out
5.5. Fully integrates with TPB's existing Azure Active Directory

6. **PROJECT TIMELINE**
6.1. Project activities shall commence within seven (7) calendar days upon receipt of the Notice to Proceed and shall run for ninety (90) calendar days
6.2. Incomplete deliverables beyond the set timeline shall be subject to liquidated damages to be computed by TPB's Finance Department.
6.3. Extending the project timeline may be requested subject to the approval of TPB's Chief Operating Officer (COO). Extension requests should be communicated via an official letter addressed to the COO within five (5) working days before the deadline. This is to give TPB sufficient time to review and act on the request.

7. **APPROVED BUDGET FOR THE CONTRACT:**
7.1. One Million Pesos (P1,000,000.00)
7.2. Inclusive of all applicable fees and taxes

8. **PAYMENT SCHEDULE**
Payment will be on a send-bill arrangement to be settled within thirty (30) calendar days upon receipt of a billing statement and complete supporting documents subject to usual accounting rules and regulations.

Payments will be made through a Landbank of the Philippines (LPB) deposit. In case the supplier does not have an LBP account, bank charges will be shouldered by the supplier.

Milestone	Payment (% of the contract amount)	Activity

1	20%	**Presentation and Approval of the Work Plan** Documentation: • Work Plan signed by the MIS Department Head • Certificate of milestone completion and acceptance signed by the MIS Department Head
2	20%	**Discovery Phase** Documentation: • Attendance sheets • Certificate of milestone completion and acceptance signed by the MIS Department Head
3	20%	**Assessment Phase** Documentation: • Assessment Report • Certificate of milestone completion and acceptance signed by the MIS Department Head
4	20%	**Build Phase** Documentation: • System screenshot • Certificate of milestone completion and acceptance signed by the MIS Department Head
5	20%	**Project Turnover and Acceptance** Documentation: • Attendance sheet/s • Project Documentation • Certificate of project completion and acceptance signed by the MIS Department Head

9. **CONTRACT DURATION**

   The services shall start within seven (7) calendar days upon receipt of NTP and end within ninety (90) calendar days.

10. **PROJECT OFFICER CONTACT DETAILS**

    Team Leader   Jose Teodoro B. Delos Reyes <jose_delosreyes@tpb.gov.ph>

    Members   Ian Carlo Q. Santos <ian_santos@tpb.gov.ph>

    Edison S. Genelazo <edison_genelazo@tpb.gov.ph>

    8525-9318 loc 215 and 216