

DPS FRAMEWORK SCHEDULE 4: LETTER OF APPOINTMENT AND CONTRACT TERMS

Part 1: Letter of Appointment

ESRO Revealing Reality

REDACTED

Attn: REDACTED

REDACTED

Dear REDACTED

Letter of Appointment

This letter of Appointment dated 9th October 2019, is issued in accordance with the provisions of the DPS Agreement (RM6018) between CCS and the Supplier.

Capitalised terms and expressions used in this letter have the same meanings as in the Contract Terms unless the context otherwise requires.

Order Number:	CCSN19A31
From:	UK Visa and Immigration ("Customer")
To:	ESRO ("Supplier")

Effective Date:	9 th October 2019
Expiry Date:	End date of Initial Period 8 th October 2022 End date of Maximum Extension Period 7 th October 2023 Minimum written notice to Supplier in respect of extension: 30 days

Services required:	<p>Customer Experience: UKVI would like to have detailed understanding all customer groups. Its detailed Segmentation of a more than 3,800 visa customers (July-August 2018) has given us a deeper, more granular understanding of the Customer's principle customer groups within the visa cohort REDACTED</p> <p>The requirement has been split out in to six (6) projects. The Supplier will be required to complete the following tasks per project:</p> <ol style="list-style-type: none">1. Inception/Planning;2. Fieldwork;3. Analysis of data / transcripts;4. Drafting final report;
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	<p>5. Presentation of findings/workshops.</p> <p>REDACTED</p> <p>In addition, we expect that through all of this work, new potential propositions can be conceived and can therefore also be tested. There will therefore need to be some flexibility about projects – this could involve replacing one project with another, or embarking on new projects as we discover new concepts.</p> <p>We welcome mixed methodology approaches, including online communities, ethnography, focus groups, interviews, behavioural sciences approaches or other.</p> <p>Special attention needs to be put on maximising value and delivering cost efficient ways of working.</p> <p>Note that some projects may need to run concurrently and we expect that the supplier has access to resources to ensure this can happen. The detail and sequence of projects will be run at Customer’s Initial Project Meeting.</p> <p>Also note that whilst projects are spelled out differently, we expect the agency is able to identify efficient ways to potentially run two or more projects together – this would be in the case that customers can be joined together to test a number of propositions.</p>
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Key Individuals:	REDACTED
[Guarantor(s)]	N/A

Contract Charges (including any applicable discount(s), but excluding VAT):	Total Project Cost - £395,385.50 REDACTED
Insurance Requirements	As stated in Terms and Conditions
Liability Requirements	<p>18.2. Subject always to Clauses 18.1 and 18.3, the maximum amount the Supplier can be liable for in respect of all Defaults shall in no event exceed:</p> <p>18.2.1. In relation to any Defaults occurring from the Effective Date to the end of the first Contract Year, the higher of the figure specified in the Letter of Appointment or a sum equal to 125% of the Contract Charges estimated by the Customer for the first Contract Year;</p> <p>18.2.2. In relation to any Defaults occurring in each subsequent Contract Year that commences during the remainder of the Term, the higher of the figure specified in</p>

	<p>the Letter of Appointment or a sum equal to 125% of the Contract Charges payable to the Supplier under this Contract in the previous Contract Year; and</p> <p>18.2.3. In relation to any Defaults occurring in each Contract year that commences after the end of the Initial Term, the higher of the figure specified in the Letter of Appointment or a sum equal to 125% of the Contract charges payable to the Supplier under this Contract in the last Contract Year commencing during the Term.</p>
Customer billing address for invoicing:	REDACTED

GDPR

Call-Off Schedule 5 Schedule of Processing, Personal Data and Data Subjects

Description	Details
Subject matter of the processing	REDACTED
Duration of the processing	REDACTED
Nature and purposes of the processing	REDACTED
Type of Personal Data	REDACTED
Categories of Data Subject	REDACTED
Plan for return or destruction of the data once the processing is complete UNLESS requirement under union or member state law to preserve that type of data	REDACTED

FORMATION OF CONTRACT

BY SIGNING AND RETURNING THIS LETTER OF APPOINTMENT (which may be done by electronic means) the Supplier agrees to enter a Contract with the Customer to provide the Services in accordance with the terms of this letter and the Contract Terms.

The Parties hereby acknowledge and agree that they have read this letter and the Contract Terms.

The Parties hereby acknowledge and agree that this Contract shall be formed when the Customer acknowledges (which may be done by electronic means) the receipt of the signed copy of this letter from the Supplier within two (2) Working Days from such receipt

For and on behalf of the Supplier:

For and on behalf of the Customer:

REDACTED

REDACTED

ANNEX A

Customer Project Specification



Crown
Commercial
Service

Attachment 3 – Statement of Requirements

Contract Reference: Provision of Qualitative Insight for Customer
Journeys and Proposition Development
CCSN19A31

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1. PURPOSE

- 1.1 The contract will be for a three (3) year term with the option to extend for a further one (1) year.

2. BACKGROUND TO THE REQUIREMENT/OVERVIEW OF THE REQUIREMENT

- 2.1 The Customer is striving to deliver a world-class customer experience. In the Customer Insight team, they are working to develop clearer and more innovative ways to identify and share insight for the business.
- 2.2 More effective storytelling is core to the Customer's communication plans, and they envisage that capturing customers' attitudes, emotional experiences, behaviours and expectations with a view to improving their existing offer. Aside from improving the customer experience of their current services via in-depth qualitative insight, the Customer also need to understand customer expectations or experiences of any future changes.
- 2.3 The Customer base will speak a range of languages and some may be difficult to engage with or reach.
- 2.4 The Customer's requirement requires a specialised qualitative agency to conduct research that will deliver detailed knowhow on how to improve the customer experience now and in the future.

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3. DEFINITIONS

Expression or Acronym	Definition
UKVI	Means UK Visas and Immigration
The Customer	Means UK Visas and Immigration
Customer Journey Map	Means a detailed diagram or picture showing the steps that customers go through when using the Customer's services or purchasing Customer's products as well as the emotions they go through.
Sponsors	Means A body or employer that is funding an applicant's studies (course fees or living expenses or both) or employment
MRS	Means Market Research Society
B2B	Means Business to Business
PRAU	Means Performance, Reporting & Analysis Unit – an internal database of UKVI customers
Sponsors	Means a body or employer that is funding an applicant's studies (course fees or living expenses or both) or employment
Priority service	Means it provides the customer with a faster application decision than standard processing times
Premium Services	Means added value products such as checking applications prior to submitting, premium service lounges and passport return services that improve the experience of the service

4. SCOPE OF THE REQUIREMENT

- 4.1 The scope of the requirement extends to the following:
- 4.1.1 Conducts qualitative research of individual projects;
 - 4.1.2 Creation of a report at the end of each individual project to provide the Customer with an understanding of the customer journey and the issues that key customer groups go through.
- 4.2 Please see link on published UKVI migration data for background: <https://www.gov.uk/government/collections/migration-transparency-data#uk-visas-and-immigration>
- 4.3 The Customer has access to internal databases (through the Please see link on published UKVI migration data for background: <https://www.gov.uk/government/collections/migration-transparency-data#uk-visas-and-immigration>
- 4.4 The Customer has access to internal databases (through the Performance, Reporting & Analysis Unit - PRAU) which can be used for sample for this research and the Potential Provider will have access to this data.

- 4.5 The database holds a high volume of customers contact details. By way of example for the month of February 2018, UKVI's global customer satisfaction survey was emailed to 140,000 overseas customers and 24,000 in-country customers for whom they held an email address and a visa decision was made during the past month.
- 4.6 In addition, for in-country customers the Customer held 18,000 contact telephone numbers in February 2018.
- 4.7 For the purpose of this Brief, the Customer is unable to provide an equivalent number of telephone numbers held for overseas customers, but would expect the volume to be very high.
- 4.8 Demographic information that the Customer holds includes:
 - 4.8.1 Name
 - 4.8.2 Date of Birth
 - 4.8.3 Nationality
 - 4.8.4 Email address
 - 4.8.5 Phone number
 - 4.8.6 Applicant addresses (current and past for in country but only most recent for out-of-country)
 - 4.8.7 Details of representatives acting on the applicants' behalf
 - 4.8.8 Application type
 - 4.8.9 Date of application
 - 4.8.10 Date of decision(s) (cases might be reconsidered)
 - 4.8.11 The decision(s)
- 4.9 The system available to the Customer captures demographic data for sponsors, which may be used as a means of understanding the needs and behaviours of applicants who use this route, through the eyes of the sponsor. Demographic data for sponsors includes:
 - 4.9.1 Sponsor name
 - 4.9.2 Addresses
 - 4.9.3 Email address
 - 4.9.4 Phone number
 - 4.9.5 Key contact and Authorising officer details
 - 4.9.6 Size of organisation (based on # employees)
 - 4.9.7 Tier 2 and 4 sponsors
 - 4.9.8 What professional bodies they are associated with

5. THE REQUIREMENT

5.1 Customer Experience: UKVI would like to have detailed understanding all customer groups.

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5.2 The requirement has been split out in to six (6) projects.

5.3 The Supplier will be required to complete the following tasks per project:

5.3.1 Inception/Planning;

5.3.2 Fieldwork;

5.3.3 Analysis of data / transcripts;

5.3.4 Drafting final report;

5.3.5 Presentation of findings/workshops.

REDACTED

5.4 In addition, the Customer expects that through all of this work, new potential propositions can be conceived and can therefore also be tested. There shall therefore need to be some flexibility about projects – this could involve replacing one project with another, or embarking on new projects as we discover new concepts.

5.5 The Customer welcomes mixed methodology approaches, including online communities, ethnography, focus groups, interviews, behavioural sciences approaches or other.

5.6 Special attention needs to be put on maximising value and delivering cost efficient ways of working.

5.7 Note that some projects may need to run concurrently and the Customer expects that the supplier has access to resources to ensure this can happen. The detail and sequence of projects will be run at Customer's Initial Project Meeting.

5.8 Also note that whilst projects are spelled out differently, we expect the agency is able to identify efficient ways to potentially run two or more projects together – this shall be in the case that customers can be joined together to test a number of propositions.

6. KEY MILESTONES AND DELIVERABLES

6.1 The following Contract milestones/deliverables shall apply:

Milestone/Deliverable	Description	Timeframe or Delivery Date
1	Contract Inception Meeting	Within two (2) weeks of Contract Award
2	Completion of each individual project	Within three (3) months of project commencement

7. MANAGEMENT INFORMATION/REPORTING

- 7.1 Over the duration of the contract and for the duration of each of the projects, the Customer is expect at the end of each project the provision of an Executive summary with key Insights and recommendations. This will take the form of a PowerPoint (or equivalent) with no more than 20 slides sent to the Customer Research and Insight team.
- 7.2 As part of the Customer’s customer journeys programme, the Customer will require continuous learning with a view to ensure continuous improvement. If there are obvious necessary improvements, these shall be communicated as soon as possible to the Customer Research and Insight team so that an issue is solved quickly, rather than waiting for a report. It is important that agile work methods are used and that the Customer seek to build their understanding in real time throughout each project, rather than simply at the production of a full report at the end of each project.
- 7.3 The Successful Supplier in collaboration with the customer research team shall be required to work with the Customer’s operations, customer excellence, customer champions, customer strategy, and digital teams to help them identify the root cause of customer issues identified in the research. This may be in the form of regular workshops or consultations with Customer’s colleagues – always agreed with and working in collaboration with the customer insight team. The Successful Supplier shall be expected to run workshops with the Customer’s stakeholders to share findings and recommendations and workout solutions with said stakeholders. The Successful Supplier shall be required to run one (1) workshop per project.
- 7.4 The Successful Supplier shall need creative ways of visualising project outputs, including customer journey illustrations brought to life, in a variety of ways. Specifically, outputs that can bring emotion, not only information, are preferred. The Customer envisage illustrations (e.g. Cartoon illustrations, infographics) that can tell a story about how customers use Customer’s services, how they benefit from them and what difficulties they find.

8. VOLUMES

- 8.1 The initial requirement is for six (6) projects as identified within Section 6. However over the period of the contract; the priority or type of project might change therefore there could be an increase or decrease in the number of projects requested.

9. CONTINUOUS IMPROVEMENT

- 9.1 Please see below example text relating to Continuous Improvement, please amend as appropriate to ensure that it is relevant to the requirement.
- 9.2 The Supplier shall be expected to continually improve the way in which the required Services are to be delivered throughout the Contract duration.
- 9.3 Changes to the way in which the Services are to be delivered shall be brought to the Customer's attention and agreed prior to any changes being implemented.
- 9.4 Any proposed changes shall be outlined in a report that identifies must include detail around the following:
- 9.4.1 The area affected by the change;
 - 9.4.2 The change proposed;
 - 9.4.3 The rationale behind the change, outlining any benefits;
 - 9.4.4 Any potential risks that the Customer needs to be aware of.

10. QUALITY

- 10.1 The Supplier shall abide by the MRS code of conduct throughout the delivery of this Contract.

11. STAFF AND CUSTOMER SERVICE

- 11.1 The Supplier shall provide a sufficient level of resource throughout the duration of the Contract in order to consistently deliver a quality service when potentially being required to run various project simultaneously.
- 11.2 The Successful Supplier's staff assigned to the Contract shall have the relevant qualifications and experience to deliver the Contract to the required standard. The Customer requires that the staff responsible for the project be MRS accredited. The Successful Supplier's staff shall have had commercial research experience in a B2B services industry, such as utilities, financial services and delivery.
- 11.3 The Supplier shall ensure that staff understand the Customer's vision and objectives and will provide excellent customer service to the Customer throughout the duration of the Contract.

- 11.4 Potential Bidders may sub-contract specific pieces of work to other suppliers/agencies or partners in order to deliver the best possible job. Details regarding sub-contractors must be provided as part Potential Bidder bid submissions.

12. SERVICE LEVELS AND PERFORMANCE

- 12.1 The Customer will measure the quality of the Supplier’s delivery by:

12.1.1

KPI/SLA	Service Area	KPI/SLA description	Target
1	Service Delivery	Completion of each individual project: Within three (3) months of commencement	100%
2	Project Management	Contract Inception Meeting: Within two (2) weeks of Contract Award	100%

- 12.2 The Supplier shall provide a robust escalation procedure to help resolve any issues that may arise within project delivery. This should include the provision of a dedicated senior point of contact who can deal with and resolve such issues.
- 12.3 The Customer shall maintain a record of the Supplier adherence to the agreed service level and performance timelines. Any non-adherence shall result in performance review meetings between the Customer and the Successful Supplier, to provide a full debrief and explanations as to why the service level agreement was not met. Improvement plans will also be established during these meetings.
- 12.4 If the Supplier falls below the required targets for two (2) consecutive months, they shall be expected to work with the Customer through monthly meetings to rectify the situation.

13. SECURITY AND CONFIDENTIALITY REQUIREMENTS

- 13.1 The successful supplier must sign and abide by the Data Protection Act. The processes around customer data management will be required to comply with the Customer’s Security guidelines – these shall be agreed during system set up. Customer details held by the successful supplier will need to be destroyed following completion of each project at an agreed date, with confirmation of this provided via email to the Customer Intelligence team.

14. PAYMENT AND INVOICING

- 14.1 The Customer shall raise a purchase order on award of contract and this will create a purchase order number. This number will need to be quoted on all invoices raised by the supplier. Payments shall be made on an annual basis.
- 14.1.1 Each invoice MUST state a valid purchase order number.

- 14.1.2 Each invoice should list an elemental breakdown of services supplied.
- 14.1.3 Payment will be made 30 days following receipt of a correctly submitted invoice.
- 14.1.4 All invoices should be submitted for the attention of Accounts Payable at the following address(s):
 - 14.1.4.1 REDACTED
 - 14.1.4.2 REDACTED
 - 14.1.4.3 REDACTED

15. CONTRACT MANAGEMENT

- 15.1 Attendance at Contract Review meetings shall be at the Supplier's own expense.

16. LOCATION

- 16.1 The location of the Services shall be carried out at:
 - 16.1.1.1 REDACTED

ANNEX B
Supplier Proposal

REDACTED