

OFFICIAL



Crown
Commercial
Service

DEPARTMENT FOR WORK & PENSIONS

and

IPSOS MORI

CONTRACT

for

The Provision of Quantitative and Qualitative Research

Reference: CCCO17A08

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**SUBJECT TO THE CALL-OFF TERMS AND CONDITIONS OF UK SHARED BUSINESS
SERVICES LTD. PRECEDENT FRAMEWORK AGREEMENT
FOR THE PROVISION OF MARKET RESEARCH SERVICES FRAMEWORK MR130001**

**ORDER FORM
Framework Agreement**

FROM

Customer (the “Authority”)	Department for Work and Pensions
Service Address	Department for Work & Pensions, REDACTED
Invoice Address	REDACTED
Contact Ref:	REDACTED.uk
Contract Value	Call off arrangement value capped at £1.6M
Contract Duration	2 years with an option to extend by 24x1 months
Order Number	To be confirmed
Order Date	To be confirmed

TO

Provider:	Ipsos MORI
For the attention of: E-mail Telephone number	REDACTED
Address	REDACTED

1. SERVICES REQUIREMENTS

Services and deliverables required: 26th May 2017

1. The Authority's Scope of the Requirement

The Authority requires the Provider to:

- 1.1** Deliver qualitative testing and quantitative research to support campaign development and delivery, on a call off contract basis. The Provider will work with the Authority to shape and develop the research approach.
- 1.2** The Provider is to provide robust quantitative research and analysis that will enable the evaluation of communications activity on a regular and on-going basis. This evaluation will guide the development and delivery of future communication activity.
- 1.3** The Provider may also need to provide qualitative research to gather audience insights and inform the development of, for example, campaign creative, messaging, and/or information products. This would be commissioned on an ad-hoc basis.

1.4 The Authority requires the Provider to:

- a) Proactively support development of an evaluation strategy aligned to the Government Communications Service Evaluation model which can be found at: <https://gcs.civilservice.gov.uk/wp-content/uploads/2016/01/GCS-Evaluation-Framework.pdf>
- b) Support design of evaluation approach, questionnaire design and discussion guide development as requested by the Authority.
- c) Carry out scheduled quantitative research to baseline and track a broad range of awareness, attitudinal and behavioural measures.
- d) Identify, report and track relationships between measures.
- e) Identify variability in findings across various criteria, including demographics, and ideally across our functional and attitudinal segments. The Authority will specify during briefing meetings exactly what will be required at the time.
- f) Contribute to development of campaigns through providing evidence based observations and recommendations.
- g) Undertake ad-hoc qualitative research and testing as required, to include campaign messages and creative treatments, and to capture insight.
- h) Work closely with the Authority and their other agencies, (Creative Agency, Media Planning Agency and Media Buying Agency) including active participation in checkpoints and workshops, to use research findings to make recommendations on future communications.
- i) Work collaboratively with the Authority and their other agencies, (Creative Agency, Media Planning Agency and Media Buying Agency) particularly our communications planning Provider to define unambiguous measures; and, help set stretching but realistic targets for each, that take account of broader success measures.

- j) Develop and deliver required reports and summaries of research findings, for internal and external use. (See Section 6 below)
- k) Recommend the most appropriate methodology for the qualitative and quantitative research, ensuring the appropriate sample sizes are available.

1.5 The Authority's communications evaluation model, follows the Government Communications Service Evaluation Framework at <https://gcs.civilservice.gov.uk/guidance/evaluation/tools-and-resources/>

1.6 The quantitative research and analysis must:

- Identify and track appropriate 'lead' indicators – attitudes or intended behaviours (that should lead to actual behaviour), and an insight into the key factors driving these measurements. The Authority would like to get to the impact of the campaigns and other communications activity on actual behaviour as soon as data is available.
- Broadly measure the effectiveness of communications activity by tracking campaign recall and awareness of messages; and identify and track appropriate 'lag' indicators – real time behaviour/activity.
- Differentiate, as far as possible, between the impact of Authority communication activity on intermediate outcomes, and that of external factors.
- Provide a robust 'early warning system' to alert the Authority immediately if things are not going to plan against key measures (or indeed if the objectives are achieved ahead of schedule) so that we can rapidly scale activity up or down, as appropriate.
- Allow for flexibility: while the ultimate objectives will remain constant, the means of achieving them may change as Authority understanding develops over time. As a result, the precise mix of out-take and intermediate outcomes may be refined during the campaign.
- Provide support and tracking for general campaign activity, including attitudinal measures) as required.

1.7 The Authority's research requirements may initially relate to our pensions and savings communications activity, however on a call-off basis, we may commission work on other priority areas within the Authority and its agencies, such as employment, health or disadvantaged groups.

1.8 The Provider will work with the the Authority to review its current evaluation strategy and inform design of its future approach. As a guide, the Authority anticipates the following requirements to support Pensions campaigns:

- Qualitative research into new Pensions campaign creative (likely in Summer and Winter 2017)
- Quantitative tracking research into the impact of specific campaign activity for State Pension and Workplace Pensions (auto enrolment), and potentially into Pension Wise guidance service campaign activity.
- Integration of wider attitudinal measures regarding saving and pensions into

quantitative research.

- Ad-hoc research and insight gathering.

1.9 Key Milestones

The following project milestones that the Authority will measure the quality of delivery against:

Milestone	Description	Timeframe
1	Working session with the Authority to identify urgent and early requirements	Within one week of contract award
2	Development of service standards and performance assessment processes	Within 4 weeks of contract award
3	Development of evaluation approach for Pensions quantitative research	Within 4 weeks of contract award

1.9 Reporting

The Provider will provide research reports in appropriate and agreed formats, which include analysis and recommendations, after each research exercise.

The Provider will provide the Authority with top line findings shortly after fieldwork has been completed, as well as full and final versions of the results.

The Provider will also provide recommendations on what format of reporting will best feed into the Authority reporting, and support appropriately the Authority wider evaluation objectives requirements.

Reporting must be authoritative and comprehensive, and it will be necessary to present this in a format, which can be readily understood by colleagues unfamiliar with communications or research terminology. This may include development of research summaries for external publication.

The Provider will need to present the findings of the research including analysis and recommendations, in person to the Authority. This is likely to take place in the Authority's offices in REDACTED

The Provider will be flexible and responsive to need; for example at certain times, fast and succinct reporting may be required – either on existing data, or new research which we may want to commission on an ad hoc basis.

The Provider will need to provide regular updates on the progress of the work they are carrying out. This may be by email or as part of a weekly or fortnightly teleconference with the Authority. As part of agreed performance and service monitoring, the Provider will also provide regular reports detailing the delivery of the Service as well as achievements, targets met, and lessons learned.

The Provider will provide all data tables and Statistical Package for the Social Sciences (SPSS) files for all the quantitative research undertaken.

1.10 Continuous Improvement

The Provider will be expected to continually improve the way in which the required Services are to be delivered throughout the Contract duration, including proactively suggesting ways in

which research could be improved or provide greater value for money.

The Provider will present new ways of working to the Authority during quarterly Contract review meetings.

Changes to the way in which the Services are to be delivered must be brought to the Authority's attention and agreed prior to any changes being implemented.

1.11 Staff and Customer Service

The Authority requires the Provider to provide a sufficient level of resource throughout the duration of the Research Contract in order to consistently deliver a quality service to the Authority.

The Provider's staff assigned to the Quantitative and Qualitative Research shall have the relevant qualifications and experience to deliver the Contract.

The Provider shall ensure that all staff understand the Authority's vision and objectives and will provide excellent customer service to the Authority throughout the duration of the Contract.

1.12 Intellectual Property Rights (IPR)

It shall be a condition of the Contract that, except to the extent that the Services incorporate designs furnished by the Authority, the Services will not infringe any patent, trade mark, registered design, copyright or other right in the nature of Intellectual Property of any third party and the Provider shall indemnify the Authority and the Crown against all actions, suits, claims, demands, losses, charges, costs and expenses which the Authority or the Crown may suffer or incur as a result of or in connection with any breach of this Condition.

All Intellectual Property Rights (including ownership and copyright, but excluding trademarks and trade names of the Provider) in:

Any Specifications, instructions, plans, drawings, patents, patterns, models, designs or other material furnished to or made available to the Provider by the Authority shall remain the property of the Authority; and

The final version of any tangible product of the Services (the "Final Product") delivered to the Authority and prepared by or for the Provider for use, or intended use, in relation to the performance of this Contract, shall (save as set out below) belong to the Authority on payment of the Contract Price for the Services, and the Provider shall ensure that the Providers employees, servants, agents, providers and sub-contractors shall not (except when necessary for the implementation of the Contract or as otherwise permitted by the Contract) without prior written consent of the Authority, use any Intellectual Property Rights assigned to the Authority in accordance with this clause.

The Authority shall not require the Provider and the Provider shall not be obliged to transfer or assign:

Intellectual Property Rights in any part of the Final Product that may be owned by a third party and which has been identified as such in the Final Product and or

Any Intellectual Property Rights in the Providers methods of work, working papers, computer programmes, methodologies, skills, experience, expertise and any associated or related information maintained by the Provider in any form, all Intellectual Property Rights therein remaining vested in the Provider

To the extent that matters excluded are comprised in or incorporated in or required in connection with a Final Product, the Provider shall grant the Authority on payment of the Contract Price for the Services a non-exclusive royalty free licence to use the same solely for the purposes contemplated by this Contract. The Provider shall retain ownership of its working papers. Subject to the Providers confidentiality commitments to the Authority, for the purposes of delivering services to the Authority and other clients of the Provider, the Authority and other Contractor Persons shall be entitled to use, develop or share with each other knowledge, experience and skills of general application gained through performing the Services.

1.13 Additional Requirements

The Provider will demonstrate their compliance with the MRS code of conduct in all aspects of this project.

The Provider will be expected to support the questionnaire development process, particularly in suggesting optimal and cost-efficient question formats. This may be provided remotely but the Authority would envisage the need for a set-up meeting, to run through the project logistics. This should be factored into any contract pricing.

Some of the data resulting from this exercise may be used in press releases and published in various formats, after going through the Departmental Communications publishing process.

The Provider must provide the Authority with a main contact/account manager and at least two back-up contacts (these may be different contacts for quantitative and qualitative work).

The Provider must ensure that appropriate members of staff are accessible to the Authority **between 8:00am and 18:00pm in order to discuss routine operational matters.**

1.1a Providers Response

As per the Providers proposal of 31st March 2017

This is a call off contract and any recommendations within the Provider's response will only be actioned following agreement with the Authority.

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(1.2) Commencement date: 1st June 2017

(1.3) Price

This is a call off agreement and volumes cannot be guaranteed.

The Contract value is capped at £1.6 Million

The Authority reserves the right not to spend the entire budget

No guarantee or representation has been, or shall be deemed to have been made by the Authority in respect of the total quantity or value of the Services, which the Authority may order for the duration of this agreement.

This is a call off agreement and the Authority will call off from the following rates as and when

services are required the Framework rates that will form the contract can be found below.

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For any waves of research commissioned, the Authority will obtain a quotation from the Provider, this quotation will be broken down into days required for the task x day rate to give a total. This will be checked against the contract rates to ensure value for money is being obtained. Each use of the contract will be subject to standard approval routes, including financial sign off; programme governance (as required) and overall Cabinet Office approval for campaign spend.

(1.4) Completion date: 31st May 2019

2 ADDITIONAL REQUIREMENTS

(2.1) Supplemental requirements in addition to Call-Off Terms and Conditions:

Intellectual Property Rights (IPR)

It shall be a condition of the Contract that, except to the extent that the Services incorporate designs furnished by the Authority, the Services will not infringe any patent, trade mark, registered design, copyright or other right in the nature of Intellectual Property of any third party and the Provider shall indemnify the Authority and the Crown against all actions, suits, claims, demands, losses, charges, costs and expenses which the Authority or the Crown may suffer or incur as a result of or in connection with any breach of this Condition.

All Intellectual Property Rights (including ownership and copyright, but excluding trademarks and trade names of the Provider) in:

Any Specifications, instructions, plans, drawings, patents, patterns, models, designs or other material furnished to or made available to the Provider by the Authority shall remain the property of the Authority; and

The final version of any tangible product of the Services (the "Final Product") delivered to the Authority and prepared by or for the Provider for use, or intended use, in relation to the performance of this Contract, shall (save as set out below) belong to the Authority on payment of the Contract Price for the Services, and the Provider shall ensure that the Providers employees, servants, agents, providers and sub-contractors shall not (except when necessary for the implementation of the Contract or as otherwise permitted by the Contract) without prior written consent of the Authority, use any Intellectual Property Rights assigned to the Authority in accordance with this clause.

The Authority shall not require the Provider and the Provider shall not be obliged to transfer or

assign:

Intellectual Property Rights in any part of the Final Product that may be owned by a third party and which has been identified as such in the Final Product and or

Any Intellectual Property Rights in the Providers methods of work, working papers, computer programmes, methodologies, skills, experience, expertise and any associated or related information maintained by the Provider in any form, all Intellectual Property Rights therein remaining vested in the Provider

To the extent that matters excluded are comprised in or incorporated in or required in connection with a Final Product, the Provider shall grant the Authority on payment of the Contract Price for the Services a non-exclusive royalty free licence to use the same solely for the purposes contemplated by this Contract. The Provider shall retain ownership of its working papers. Subject to the Providers confidentiality commitments to the Authority, for the purposes of delivering services to the Authority and other clients of the Provider, the Authority and other Contractor Persons shall be entitled to use, develop or share with each other knowledge, experience and skills of general application gained through performing the Services.

(2.2) Variations to Call-Off Terms and Conditions

There is an option to extend this call off agreement by 24x1 months subject to Ministerial approval and available contract value.

3. PERFORMANCE OF THE SERVICES [AND DELIVERABLES]

(3.1) Key personnel of the Provider to be involved in the services [and deliverables]:

Core Team and Responsibilities

REDACTED

(3.2) Performance standards

Key Milestones

Milestone	Description	Timeframe
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1	Working session with the Authority to identify urgent and early requirements	Within one week of contract award
2	Development of service standards and performance assessment processes	Within 4 weeks of contract award
3	Development of evaluation approach for Pensions quantitative research	Within 4 weeks of contract award

Service Levels and Performance

The Authority will measure the quality of the Provider's delivery by the following key performance indicators (KPIs):

The Provider is required to adhere to the timescales/ project plans 100 per cent unless otherwise agreed by the Authority

The Provider will ensure that 100 per cent of the services provided address the requirements in the brief

The Provider acknowledges receipt 100 per cent of complaints and issues raised immediately, and implements and manages resolutions to all of them during the term of the contract, and within agreed timescales with the Authority, including the escalation of appropriate issues to the the Authority's representative

The Provider adheres 100 per cent to the Authority's branding, data security and other guidance, (to be provided to the Provider upon appointment).

The Provider delivers 90% customer satisfaction with account management arrangements, as judged by regular client questionnaires (to be designed with the Authority on appointment). The questionnaire will include assessment as to whether;

The Provider is open and cooperative in their relationship with the Authority, and is flexible in response to changing Departmental requirement; and

The Provider will find solutions to any issues that arise under the Provider's control during the duration of the contract.

Provision of spend data and other reporting in a format designed by the Authority to the Authority within 5 working days of request.

(3.3) Location(s) at which the services are to be provided:

REDACTED

(3.4) Quality standards

The Provider will adhere to the Framework quality standards, as referred to in the Framework Agreement and with all standards stated within their tender supplemented below:

The Business Excellence System (BES) which is an integrated quality, compliance and information security management system.

- ISO 20252, the international market research specific standard that incorporates IQCS (Interviewer Quality Control Scheme); it covers the five stages of a Market Research project.
- MRS Company Partnership – by being an MRS Company Partner,
- ISO 9001 – international general company standard with a focus on continual improvement through quality management systems.
- ISO 27001 – international standard for information security designed to ensure the selection of adequate and proportionate security controls.
- Data Protection Act – Ipsos MORI is required to comply with the Data Protection Act; it covers the processing of personal data and the protection of privacy.

The Business Excellence System is continually reviewed for effectiveness and improvement.

- Business Excellence System (BES) Group – BES representatives from all areas of the business meet regularly.
- Internal Audits and Metrics Team – Ipsos MORI has a team of trained internal auditors from across the business.
- BES Training and Communications Training and Awareness Programme covers quality, information security and compliance, which includes data protection.
- External Audits – an external auditing company visits annually to ensure compliance with the international standards accredited to.

(3.5) Contract monitoring arrangements

The Provider will need to provide regular updates on the progress of the work they are carrying out. This may be by email or as part of a weekly or fortnightly teleconference with the Authority.

As part of agreed performance and service monitoring, the Provider will also provide regular reports detailing the delivery of the Service as well as achievements, targets met, and lessons learned.

The Provider will provide all data tables and Statistical Package for the Social Sciences (SPSS) files for all the quantitative research undertaken.

Quarterly contract management meetings will take place between the Provider and the Authority.

Ad hoc contract management meetings may need to take place during the agreement.

4. CONFIDENTIAL INFORMATION

(4.1) The following information shall be deemed Commercially Sensitive Information or Confidential Information

Provider's pricing and points of contact

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BY SIGNING AND RETURNING THIS ORDER FORM THE PROVIDER AGREES to enter a legally binding contract with the Customer to provide the Service specified in this Order Form together with, where completed and applicable, the mini-competition order (additional requirements) set out in section 2 of this Order Form. Incorporating the rights and obligations in the Call-Off Terms and Conditions set out in the Framework Agreement entered into by the Provider and UK SBS on 24.02.2014 and any subsequent signed variations to the terms and conditions.

For and on behalf of the Provider

Name and Title	REDACTED
Signature	REDACTED
Date	

For and on behalf of the Customer

Name and Title	REDACTED
Signature	REDACTED
Date	