



Department
for Environment
Food & Rural Affairs

Defra Group Management Consultancy Framework: Project Engagement Letter

Completed forms and any queries should be directed to Defra Group Commercial at
DgCConsultancy@defra.gov.uk

| Engagement details | | | |
|-----------------------------|---|--------------------------------|----|
| Engagement ref # | DPEL_61541_099 | | |
| Extension? | No | DPEL Ref. | NA |
| Business Area | Group Corporate Services Strategy and Transformation | | |
| Programme / Project | Defra Group Intranet Platform Programme | | |
| Senior Responsible Officer | [REDACTED] | | |
| Supplier | Methods Business and Digital Technology Ltd | | |
| Title | Defra Group Intranet Platform Programme: Delivery Phase | | |
| Short description | The provision of project, programme and technical support to accelerate the replacement and development of the corporate intranet hosted on an existing O365 SharePoint environment and to conclude the 3 workstreams as outlined including handovers as appropriate. | | |
| Engagement start / end date | 30 th October 2023 | 22 nd December 2023 | |
| Funding source | RDEL | | |
| Expected costs 23/24 | £332,628.00 | | |
| Expected costs 24/25 | | | |
| Expected costs 25/26 | | | |
| Dept. PO reference | [REDACTED] | | |
| Lot # | Lot 3 | | |
| Version # | V1 | | |



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Approval of Project Engagement Letter

By signing and returning this cover note, Group Corporate Services accepts the contents of this Project Engagement Letter as being the services required and agrees for Methods Business and Digital Technology Ltd. to provide the services in accordance with the agreed Supplier Proposal under the overarching contract (Lot 3 - Ref 28595), with Defra Group and confirms the availability of funding to support recharge for the services.

| Signatures | | |
|--|--|--|
| Supplier | Business Area | Defra Group Commercial |
| By:  <i>Signature</i> | By:  <i>Signature</i> | By:  <i>Signature</i> |
| For and on behalf of Methods  Director of Change & Innovation | For and on behalf of Group Corporate Services  Portfolio Director | For and on behalf of Defra Group Commercial  Category Manager |
| 26-10-2023 19:50 BST | 27-10-2023 10:57 BST | 27-10-2023 11:06 BST |
| Supplier engages with Business Area to complete. Once agreed, Supplier signs front page and sends to Business Area | Business Area signs front page and sends to DgC | On approval, DgC signs and returns copy to Business Area and Supplier |

Supplier contact: 

Business Area contact: 



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General Instructions

The Engagement Letter describes the services required and provided. When completing the Engagement Letter establish the context, explain why external support is required and distinguish between the objectives, outcomes, scope and deliverables. The rationale behind the costs should be made evident in the Fees section.

1. Background

Group Corporate Services Strategy and Transformation are delivering services and operations designed to stabilise, optimise and transform the corporate services which underpin and enable the department to improve and protect our environment. Major Programmes and Platforms provide the management, support and direction to ensure our projects and programmes have the right expertise at the right time to drive effective and transformational delivery at all stages of the lifecycle.

The roadmap of transformation contains the aim to provide a new intranet, across Defra Group, on a single platform. This will provide each partner control on organisational brand, identity and unique content whilst ensuring a streamlined, seamless publishing of common content and improved user experience. This includes self-service portals and a review of current content. At the core of any solution must be our staff to ensure the outcome is a user-focused solution with support and engagement with staff to be curious, ready and prepared for any business change.

In October a set of transitions were agreed for future work on the three main workstreams in the MPP work package being delivered by Methods: Intranet, GCS Portal Discovery and Content Cloud Discovery. The transitions can be summarised as follows:

- The Defra Group Optimised Intranet to be delivered according to the current timetable and delivery plan, whilst providing input into the wider discussion on service and content ownership
- At the conclusion HR Leavers and Mailbox MVP Automation Discovery, the GCS Portal will be taken forward by DDTS to deliver future work.
- Content Cloud will be taken forward by DDTS following delivery of an As-Is Discovery Report followed by a joint discovery with DDTS on the delivery model, design approach and considerations of a tight vs loosely coupled SharePoint solution for this business need.

2. Statement of services

Objectives and outcomes to be achieved

The services provided through this agreement will seek to deliver the following outcomes:

- Conclude the testing and deployment of the new Defra Group Intranet Solution
 - Workshop to review of the business benefits supported by the delivery of Phase 2
 - Conclusion of all technical governance with DDTS to ensure handover to BAU.
 - Completion and Handover of Discovery and Deployment Documentation
 - Deployment of Phase 1 and Phase 2 (if agreed) of the solution.
 - Contribute to the activities relating to ongoing intranet service and content ownership as required
- Completion of the HR Leavers and Mailbox Automation MVP Discovery and handover to HR Automation Steering Group
 - Workshop to agree the handover format and timings
 - Delivery of Discovery report and agreed supporting collateral.
 - Documentation of pre-discovery knowledge on future areas of GCS Portal



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- Handover of GCS Portal PMO content (Risks, Issues, Assumptions, Dependencies)
- An options analysis on the approach to Content Cloud development based on a collaborative discovery with DDTS, including:
 - Workshop to agree the handover format and timings
 - Review of suitability of developing Content Cloud as a discrete, tightly coupled EDRM solution.
 - Options and recommendations for a delivery model
 - Development of design principles, with particular attention on the ability to develop a clean, simple solution architecture to support the business need.
 - Roadmap with risks and recommendations
 - User research into non-users of document storage (Content Cloud 1.0)
- PMO functions documented and handed over
- Final benefits, lessons learned and project closure completed.

The following milestone descriptions are essential to the successful delivery of the (for milestone dates see the integrated plan). Recognising that there are assumptions and dependencies on Defra Group (set out below):

Intranet

- Phase 2 workflow Go/No-Go
- Phase 2 Beta Testing
- Phase 2 UAT
- Phase 1 Intranet deployment (or handover of scripts and deployment documentation)
- Phase 2 Intranet deployment (or handover of scripts and deployment documentation)

Content Cloud

- Joint planning session to outline objectives, key topic areas, roles and activities
- Completion of discovery workshops and associated sessions
- Analysis completed against key topic areas
- Discovery Report complete and shared

HR Leavers and Mailbox Automation

- Leavers discovery complete and handed over
- Mailbox Automation discovery complete and handed over

General

- Lessons learned activity complete and signed off.
- PMO functions handed over, with full POL walkthrough.

Scope

The scope of the engagement is to provide delivery services (business and technical) to implement the new Defra Group Intranet Solution, and to undertake discoveries for the implementation of the digital platform. The engagement will work with the Major Programmes and Platforms Team and work collaboratively across Defra functions, policy areas, major programmes and Environment Agency, Animal and Plant Health Agency, Natural England, Rural Payments Agency, and Marine Management Organisation.



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Assumptions and dependencies

Dependencies

- DDTS retains ownership of technical solutions. DDTS is responsible for technical design and governance of the Employee Engagement Platform (including Project Portal).
- Required capability and subject matter expertise can be committed by stakeholders to engage with the project and this engagement service.
- DDTS will provide access to the tools and resources to allow development of new intranet solution.
- ALBs in scope of the programme will provide project management capability and capacity to manage post go-live optimisation locally. The project management service set out in this statement of work will interface with ALB project managers.
- The SRO will review, feedback, and approve the content of the Service Definition Document as a priority to support effective planning and delivery.
- A product owner, provided by Defra Group, and will interface as required with the delivery team.

Assumptions

- Accountability of delivery activities and schemes remains with the Major Platforms and Programmes Team.
- Defra can recruit resources required to enable the handover, knowledge transfer, transition, and then exit from this engagement.
- Defra can provide resources required to input into the lessons learned process at the end of this engagement.
- A product owner will be provided by Defra Group for the Defra Group Intranet Platform Programme

Risk management

As part of the PMO service the delivery team will maintain a RAID log and associated processes to identify and manage risks on behalf of the programme.

There is a risk that delays may occur in the programme due to the emergence of new and previously unknown requirements, which could result in additional work or changes to the project scope. Wherever possible the delivery team will mitigate risks in relation to slippages. The delivery approach has been designed to be as flexible as possible in accommodating scope and priority changes and delivery reviews will support increased agility in delivery.

The following risk have been specifically flagged as relating to the outcomes in this work package:

- DDTS will not be able to identify and allocate sufficient resource to the workstreams in order to facilitate a transition or contribution to discovery in the timescales outlined
- A technical governance issue or change freeze in the Christmas period will not allow the intranet deployment to proceed and the workstream to complete by December 15th
- An agreement around the benefits and acceptance criteria for the Phase 2 deployment of the Intranet will not be reached with the stakeholders involved and the deployment cannot proceed as planned by December 15th
- Acceptance of the outcome of Phase 1 beta or UAT testing will not be reached with stakeholders and consequently the deployment cannot proceed as planned by December 15th

Description of Services

A managed service to design and support implementation of the new intranet solution, gather future user and technical requirements for the digital platform, and to establish an enduring capability, to assess, analyse, and recommend solutions for known future business capabilities.



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The proposed service is formed around the provision of four core capabilities:

1. User Discovery Services - to assess new requirements, conduct user research, end to end service design and analysis to establish detailed statement requirement.
2. Technical Design and Delivery - To establish design principles and recommend technical solutions for implementation, and to support implementation of the new intranet solution.
3. Implementation - To support change management, training, content production.
4. Programme Management and PMO. To plan, provide reports and support governance.

Deliverable

A Service Delivery Document (SDD) will be created against the outcomes in this document to cover Products, Composition, Acceptance Criteria, relevant standards and Milestone dates. This is developed in conjunction with the SRO or a delegate as agreed.

The review point will be established with the SRO to coincide with the milestone payment. The purpose of this review is to ensure sign-off of all deliverables has been achieved and to ensure a clear end state of the engagement has been agreed by both parties.

By the end review point all deliverables will be complete as set out in the "outcomes to be achieved" section of this DPEL. Progress towards DPEL outcomes will be monitored and reported to the SRO through weekly reports and fortnightly SRO update meetings.

The final review point will be on 15th December 2023.

| Deliverables | | | |
|---------------------------------|---|--|--|
| Intranet Replacement Project | | | |
| Deliverable | Success Criteria | Milestone / Date | Owner (who in the delivery team?) |
| User Discovery Service | Final user discovery report for the Intranet that: <ul style="list-style-type: none"> • Records, contextualise and summarise all artefacts generated developed during Discovery | Assess service effectiveness at final review point. | User Researcher Business Analysts Service Designer |
| Technical Solution Service | Ensures effective technical governance model is in place. Completed steps to enable the deployment of the Defra Group Intranet deployment Knowledge transfer to DDTS and handover as appropriate. | Throughout delivery period. Assess service effectiveness at final review point. | Technical Solutions Architect SharePoint developer |
| Content Cloud Discovery Project | | | |
| Deliverable | Success Criteria | Milestone / Date | Owner (who in the delivery team?) |



| | | | |
|--|---|---|--|
| User Discovery Service | Remedial work to incorporate feedback from Phase 1 discovery report. User research of the Content Cloud Chatbot Research into non-users of Content Cloud | Assess service effectiveness at final review point. | User Researcher Business Analysts |
| Technical Discovery Service | An options analysis on the approach to Content Cloud development based on a collaborative discovery with DDTS, including: <ul style="list-style-type: none"> Review of suitability of developing Content Cloud as a discreet, tightly coupled EDM solution. Options and recommendations for a delivery model Development of design principles, particular attention on the ability to develop a clean, simple solution architecture to support business needs. Roadmap with risks and recommendations | Assess service effectiveness at final review point. | Technical Solutions Architect SharePoint developer |
| HR Leavers and Mailbox Automation Discovery Project | | | |
| Deliverable | Success Criteria | Milestone / Date | Owner (who in the delivery team?) |
| User Discovery Service | Delivery of Discovery report and agreed supporting collateral. Documentation of pre-discovery knowledge on future areas of GCS Portal. Handover and confirmation to HR Automation Steering Group | Assess service effectiveness at final review point. | User Researcher Business Analysts Service Designer |
| Trestle Programme Wide | | | |
| Deliverable | Success Criteria | Milestone / Date | Owner (who in the delivery team?) |
| Communications and Engagement Service | Acts as a conduit across programme stakeholder (ALB) landscape. Operates stakeholder map and engagement plan. Maintains MPP comms channels to provide regular updates on projects/ wider programme. | Throughout delivery period Assess service effectiveness at final review point. | Communications Lead |
| Change Management Service (Defra Led) | Advises on comms materials, training needs and wider project/programme management from a change management perspective. | Change Management Plan Training Needs Analysis | Change Management Lead |



| | | | |
|--|--|--|--|
| | <p>Tracks progress of change and identifies additional support needs.</p> <p>Enhances understanding of training needs to optimise the effective use of new products and solutions.</p> <p>Establishes concise training plans with clear milestones and objectives.</p> | <p>Assess service effectiveness at final review point.</p> | |
| Project Leadership | <p>Manages the project vision and strategy, based on client needs.</p> <p>Maintains effective programme governance to deliver the required outcomes.</p> <p>Oversees and directs proportionate and effective:</p> <ul style="list-style-type: none"> • Design and delivery of intranet solution for Defra Group. • User discovery services • Technical discovery services <p>Engages effectively with the SRO on projects across the Defra Group Intranet Platform Programme.</p> | <p>Throughout delivery period</p> <p>Assess service effectiveness at final review point.</p> | <p>Project Delivery Director</p> <p>Delivery and Technical Assurance</p> |
| Engagement and Delivery Management Service | <p>Adopts agile principles proportionate to delivery needs e.g. product backlogs, Kanban, sprints, retrospectives and stand ups to optimise team focus and productivity as requirements emerge.</p> | <p>Throughout delivery period</p> <p>Assess service effectiveness at final review point.</p> | <p>Project Delivery Director</p> <p>Delivery Manager</p> <p>Project Managers</p> |
| Project Management Service | <p>Effective and proportionate project management oversight across all areas of delivery.</p> <p>Effective oversight and management of scope, quality, risk, resource management and stakeholder engagement.</p> <p>Reports progress, risks, and issues effectively to appropriate project/ programme stakeholders.</p> | <p>Throughout delivery period</p> <p>Assess service effectiveness at final review point.</p> | <p>Project Managers</p> |
| PMO Service | <p>Effective and proportionate:</p> <ul style="list-style-type: none"> • Project/ programme reporting • RAID management • Governance support. • Planning • Secretariat function • Integration with project managers <p>PMO functions documented and handed over</p> <p>Handover of GCS Portal PMO content (Risks, Issues, Assumptions, Dependencies)</p> | <p>Throughout delivery period</p> <p>Assess service effectiveness at final review point.</p> | <p>PMO Lead</p> <p>PMO Manager</p> <p>Project Support Officer</p> |



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| Benefits Management Service | <p>Maintains clear, concise benefits map with line of sight between activities, business changes, benefits and objectives</p> <p>Undertakes effective and proportionate:</p> <ul style="list-style-type: none"> • Benefits identification • Benefits profiling and planning <p>Establishes mechanisms to track benefits delivery.</p> | <p>Review and recommendations for Benefits management approach across</p> <p>Assess service effectiveness at final review point.</p> | Benefits Analyst |
|-----------------------------|---|--|------------------|

Limitations on scope and change control

Unless instructions to the Supplier are later amended in writing, the work undertaken will be restricted to that set out above. In providing the services detailed above, the Supplier will be acting in reliance on information provided by the Business Area.

The Project Engagement Letter is the agreed contract of work between the Defra Group Business Area and the Supplier and can be varied under the change control process. Any changes to timescales, scope and costs will require approval by DgC.



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4. Fees

Defra Group will reimburse the Supplier for approved work done according to the table below. The total fees for the scope of work detailed in this Engagement Letter will be £332,628.00 of expenses and excluding VAT.

| Stage | Cost | Due (link to milestone dates) |
|--|--------------------|-------------------------------|
| Completion of agreed deliverables | | DD/MM/YY |
| Final Review Point | £332,628.00 | 15/12/2023 |
| Grand total | £332,628.00 | |

Expenses statement

Defra Group overarching contract rates include expenses for any travel to/from any UK location defined by the Business Area as the base office for the work. Only expenses for travel at the Business Area's request from this base can be charged. If appropriate, define permissible expenses to be charged.

Payment

The Supplier should invoice fees monthly in arrears. Defra Group will reimburse fees monthly on confirmation of approval of work delivered by the Business Area. The Supplier will keep an accurate record of time spent by staff in providing the services and provide this information and supporting narrative, if requested.

5. Governance and reporting

As part of the Call-Off Contract, the Supplier and Business Area agree to provide reporting on the following:

- Completion of the time tracker on a monthly basis, to track days worked by our consultants;

Key Performance Indicators

| KPI | KPI Requirement | Description | Reporting Frequency | Who Measures | Method of Measurement | Performance Target |
|-----|-----------------|--------------------------------------|---------------------|--------------|--------------------------|-------------------------------|
| | Delivery Review | Progress review against deliverables | 6-Weekly | SRO | <i>Report by Methods</i> | Delivery within 15% tolerance |

Feedback and satisfaction

Defra Group reserves the right to hold review meetings during the assignment, discussing what went well, opportunities for improvement on future assignments and similar. This will incorporate any 'Show and Tell' documentation or transferable products that have been produced.



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A post-engagement quality review of the engagement will be arranged where the Business Area rates the services provided.

Non-disclosure agreements

The overarching MCF2 framework include NDAs.

6. Exit management

The agreed actions and deliverables by the Supplier for when the contract ends are as follows:

Support documentation and controls developed for the project;
Project management artefacts and tools developed for the project;
Communications and stakeholder management documentation.

Notice period

The nature of these engagements require that Defra Group have the ability to terminate an engagement with notice. Defra Group's termination rights for this engagement are marked below.

The minimum notice period for termination is 5 working days regardless of engagement duration.

1. Business Area identifies a potential need for delivery support, initiates a conversation with DgC, confirms which approvals are required for an engagement to occur, e.g. Consultancy Governance Board if over £100k or DgC Corporate Services Delivery Board if under £100k.
2. Request Form completed by Business Area and submitted to DgC at:
consultancy2@defra.gov.uk
3. The form is reviewed by the DgC team around which resource route is most appropriate (e.g. Lots 1/2/3) and may request additional information/edits from the Business Area if required.
4. Lot / Supplier is selected and briefed on the request by DgC, then introduced to the requesting Business Area for further discussion and confirmation of work to be delivered
5. A Project Engagement Letter is completed by the Business Area with input from the Supplier (with supporting proposals as appropriate) and then finally agreed between the two parties, including evidence of all required approvals either being in place or being progressed (e.g. PO) and forwarded to the DgC for review by the Consultancy Governance Board (CGB).
Approval states are:

| Approval state | Definition | Permissions |
|----------------|--|---|
| Full approval | <ul style="list-style-type: none"> ▪ DPEL agreed ▪ DPEL signed: Supplier, Dept and CO ▪ Purchase Order number | <ul style="list-style-type: none"> ▪ Work can start ▪ Supplier can invoice for work |

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