

## Defra Group Management Consultancy Framework: Project Engagement Letter

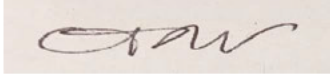
### Weybridge Target Operating Model – Advisory Support

Completed forms and any queries should be directed to Defra Group Commercial at [DgCConsultancy@defra.gov.uk](mailto:DgCConsultancy@defra.gov.uk)

Engagement details			
Engagement ref #	DPEL_		
Extension?	No	DPEL Ref.	61547_011
Business Area	Defra Group Commercial		
Programme / Project	WP&FM24 FM Weybridge Target Operating Model Technical Advisory Support		
Senior Responsible Officer	Richard Jackson		
Supplier	Deloitte LLP		
Title	Preparation of Facilities Management Target Operating Model		
Short description	TOM		
Engagement start / end date	Proposed start date 17/05/2022	Proposed end date 15/07/2022	
Funding source	DgP – Project Funding		
Expected costs 21/22	£0		
Expected costs 22/23	£154,778		
Expected costs 23/24	£0		
Dept. PO reference	TBC once letter agreed		
Lot #	Lot 2		
Version #	Start at 0.1, 1.0 when approved, increment from 1.0 for Change requests		

### Approval of Project Engagement Letter

By signing and returning this cover note, Resources and Waste accepts the contents of this Project Engagement Letter as being the services required and agrees for Deloitte to provide the services in accordance with the agreed Supplier Proposal under the overarching contract (Lot 1 - 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: __Sez Kaya_____  <i>Signature Sez Kaya</i>	By: Richard Jackson  <i>Signature</i>	By: Cheryl Tyler  
or and on behalf of Deloitte LLP Sez Kaya Partner	For and on behalf of Defra	For and on behalf of Defra Group Commercial
17/05/2022	23/04/2022	24 May 2022
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: [REDACTED]

Business Area contact: [REDACTED]

## 1. Background

The procurement of facilities management services by the Defra Group Property (DgP) is due to commence with the issue of an invitation to tender (ITT) in July 2022. To support this DgP requires support developing the facilities management client-side Target Operating Model (TOM) with specific responsibility for the integration of the Weybridge Campus and Regional Science Labs with the Office and Depot portfolio. The issue of the ITT in July 2022 is therefore dependent on its completion.

DgP is split into four core functions:

- Strategy
- Build
- Run & Maintain
- Business Support

The Run & Maintain, which requires the TOM to be developed, is split into three core pillars:

- Workplace Experience – Managing the user experience and contract management at site level
- Quality & Assurance – Managing the QSE across the overall portfolio and core contract management
- Technical Services – Managing the delivery of all services to the Weybridge

To date the DgP project team have developed a Run & Maintain Function TOM framework and are in the process of populating the detail, but further support is needed in achieving the following:

1. Ensuring the Technical Services pillar requirements are captured and integrated into the TOM
2. Support the development of the overarching Run & Maintain Function TOM
3. Ensuring that the BAU Operations team have a trusted interface between themselves and the project team to ensure point 1 is achieved
4. Ensuring that the project team have a trusted interface with the BAU Operation team to enable formalised development approval of the TOM
5. Providing the wider stakeholder group with a point of reference to discuss / develop / solution the TOM – as with points 2 & 3 this is again a trusted interface role

## 2. Statement of services

### Objectives and outcomes to be achieved

In relationship to the role supporting the development of the DgP Run & Maintain TOM there are five core outcomes to be achieved:

1. The Run & Maintain TOM has the appropriate science operations input
2. The development of the TOM enables effective engagement with APHA, a key stakeholder
3. The Science Operations team are able to focus time on BAU delivery
4. The Run & Maintain TOM has Science Ops DD and Contract SRO DD approval
5. The procurement issue milestone (July 2022) is met

There are a number of deliverables envisaged, with final sign off, closing report and knowledge transfer to be completed by 15<sup>th</sup> July 2022. Draft deliverables will be made available at the end of June 2022 to enable ITT timelines to remain on track.

## Scope

The Supplier will be requested to undertake the following activities. Due to the programme constraints, as outlined below, we need practical deliverables which will immediately form the basis of our plans and documentation in establishing the DgP Run & Maintain TOM.

The Supplier is required to complete the TOM Framework spreadsheet which articulates the Service Catalogue that has been created by DgP project team. This will include high level summaries of current approach to services, future changes to requirements, processes, tools and people to ensure that there is;

- Sufficient detail to enable the onward completion of organisation design and detailed processes (not part of the scope of this DPEL) and;
- That specific requirements of the Science operations teams have been captured and reflected in the document.

Specifically, the Supplier will undertake the following activities:

1. The DgP project team have developed a Run & Maintain Function TOM framework, the Supplier will populate the framework spreadsheet capturing current practice where it exists and proposing requirements and high level processes, people and tooling implications across the Service Catalogue. Focus will be on Hard FM as a priority with more commodity Soft FM services being picked up subsequently.
2. The Supplier will review the existing TOM framework produced by the DgP project team to identify any Science specific requirements are captured and proposals for approaches are defined that can be presented to Science Operations team for review and sign off.
3. The Supplier will identify key process, people and systems impacts and propose future enhancements as required for future Services where possible. These will be used by DgP to inform organisation design, detailed process design and ITT requirements (the Supplier will not be responsible for delivering the organisation design but will contribute in terms of understanding inputs and impacts).

Key to the achievement of the objectives the Supplier will develop a Stakeholder Engagement Plan and approach to ensure that;

- a. Technical requirements are captured and the Science Operations team have shaped the design in sufficient detail to gain their buy in;
- b. APHA have been fully engaged in the design process, understand and buy in to the TOM design; and
- c. The Science Ops DD and Contract SRO DD are able to approve the design in sufficient time to allow the procurement activities to commence in July.

### **Other deliverables**

- ***Workshop 1 – Science Operations team***

This workshop will be held on Microsoft Teams.

The workshop is envisaged to validate findings from the data collections and stakeholder engagement with a focus around a series of themes, including:

- User requirements and current or proposed delivery methods as captured in the TOM framework spreadsheet,
- Comments on the draft Statement of objectives

- ***Workshop 2 – Science Operations workshop***

This workshop will be held on Microsoft Teams

The workshop will be used to outline and discuss various aspects of the DgP TOM design with key stakeholders from Science Operations and APHA.

- **Workshop 3 Recommended TOM workshop**

This workshop will be held on Microsoft Teams

The workshop will be used to review the proposed DgP TOM design with the Science Ops DD and Contract SRO DD in support of approvals

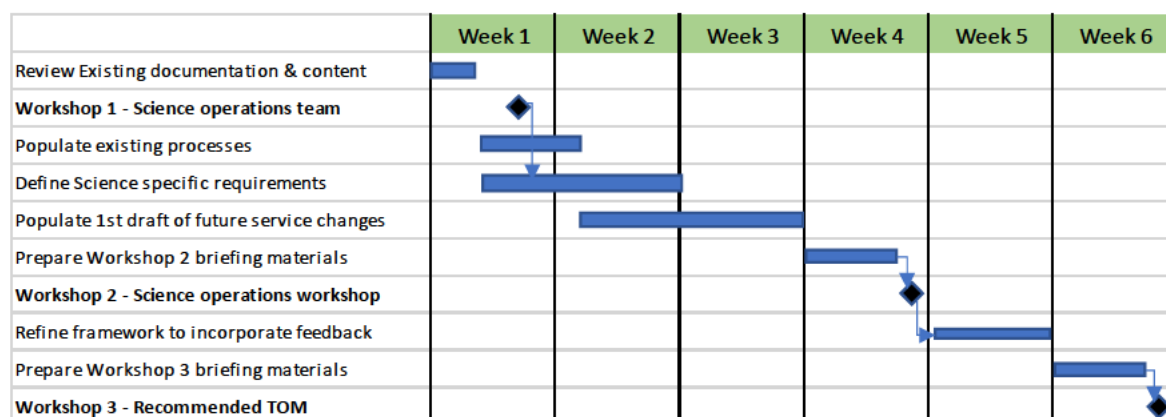
### Programme

The TOM developed for this engagement will support the FM Invitation to Tender (ITT) issue in July 2022 for office and science estates.

Subject to internal approvals the start date will be 17 May 2022 and the final report will be issued by 15<sup>th</sup> July 2022. Draft deliverables will be issued by end of June 22 to support ITT timelines.

### Approach to delivery

The high level engagement plan is shown below;



To meet the challenging timescale as referred to above Defra expect the TOM to be delivered in close cooperation with key members of the Defra group Property Team including the Science Estate team so that the work can be revised on an iterative basis. Defra will make available a key contact to assist in arranging meetings / collecting any required data or reports.

Defra will organise the initial meetings with:

- Key DgP stakeholders across Workplace Experience, Quality & Assurance and Technical Assurance.
- Key APHA stakeholders
- Key Scientific Operations stakeholders
- Key procurement / contract stakeholders

### **Assumptions and dependencies**

Assumption underpinning this scope of work is that there is an existing TOM framework for the Run & Maintain function that has been built by the DgP project team and that this alongside any existing process documentation will be provided to the Supplier team at the commencement of the project.

Assumption that the DgP project team will remain in place and provide ownership of overall TOM design supported by Supplier resources.

Assumption that Defra will provide list of key stakeholders at the kick-off meeting and give access to key Science Operations staff, APHA representatives and the Science Ops DD and Contract SRO DD will make themselves available within the timeframe to enable engagement and design activities to be completed.

Assumption that the technical specifications and documentation for any Procurement processes will be provided by the Defra project team.

Assumption that the majority of work will be undertaken remotely with travel to the Weybridge site 1 day per week if required

### Deliverables

- Overall Run & Maintain TOM design (owned by DgP Project Team, supported by Supplier team)
- Stakeholder Engagement Plan
- Workshop 1 Briefing materials to support Science Operations and APHA engagement
- Workshop 2 Briefing materials to support Science Operations and APHA options review
- Workshop 3 Briefing materials to support Science Ops DD and Contract SRO DD to approve design
- Weekly progress reports

Deliverable	Success Criteria	Milestone / Date	Owner (who in the delivery team?)
<b>Project Stage A</b>			
Workshop 1 & 2 Briefing Materials	TOM input captured by Science Operations and APHA reps and design options presented for review	17 <sup>th</sup> June 22	Jim Craig
Overall Run & Maintain TOM design Workshop 3 Briefing Materials	Science Ops DD and Contract SRO DD have received final design and stakeholder engagement report to support approval	1 <sup>st</sup> July 22	Jim Craig
<b>Internal Capability Development Outcomes</b>			
None identified			
<b>Social Value Outcomes</b>			
None identified			

### 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.

### 3. Delivery team





Provide details of the agreed team members including their roles and responsibilities during the project.

Name	Role (link to stage/s resource will work on)	Grade	Daily rate (excl. VAT)	# of days	Cost (excl. VAT)
				1	
				1	
				1	
				1	
				1	
				1	

<b>Total resource</b> <b>Total days*</b> <b>Engagement Length**</b>  <small>*Total days worked across all resources</small> <small>**Total working days in engagement</small>	<b>113 / 30 = 3.7</b>
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#### Business Area's team

Name	Role	Contact details

## 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 £154,778 inclusive of expenses and excluding VAT.

Provide costs for any particular stages to the engagement.

Stage	Cost	Due (link to milestone dates)
<b>A</b>		<b>DD/MM/YY</b>
Workshop 1 & 2 held with Science Operations and APHA reps		17/6/22
<b>B (additional stages can be added)</b>		

Stage	Cost	Due (link to milestone dates)
Final draft of the TOM presented for approval to Science Ops DD and Contract SRO DD	██████	1/07/22
<b>Expenses</b>		
Travel & Expenses for attending Weybridge site (NB these will be charged as incurred and this estimate is indicative)	██████	15/07/22
<b>Grand total</b>	£154,778	

*Business Area considerations:*

- Are the costs and fees appropriate (costs linked to deliverables, rates and drive value for money)?

### 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;
- The Supplier to notify the EPR team if any of conflict of interest emerges and explain how this will be managed

### Key Performance Indicators

No additional KPIs required.



KPI	KPI Requirement	Description	Reporting Frequency	Who Measures	Method of Measurement	Performance Target
1	Kick off meeting	Project team to arrange kick-off meeting with supplier to discuss all aspects of project delivery	Once, with written summary provided by supplier after meeting	Project Team	Review of meeting note	Within one week of contract commencing
2	Weekly progress meeting	Weekly meeting with project team to discuss progress, seek input / guidance and raise concerns / risks	Weekly	Supplier	Maintaining a schedule and record of meetings	Unless cancelled by project team, participation from supplier representatives at all meetings
3	Workshop 1 and 2	Workshop to develop and outlines Science Operations and APHA Options	Twice	Supplier	Briefing materials to support workshops	Participation of relevant supplier representatives at all workshops
4	Working draft of Stakeholder engagement report	Initial draft of materials	Once	Supplier	Project team receipt by email	Prior to project end (as per 'Deliverables' section)
5	Workshop 3	Presentation of Stakeholder Engagement report to Science Ops DD and Contract SRO DD	Once	Supplier	Science Ops DD and Contract SRO DD sign-off of	End of project
6	Final TOM and Stakeholder engagement report	Report following agreed iterations from feedback	Once	Supplier	Project team sign-off	End of project

### 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.

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

## Non-disclosure agreements

No additional NDAs required.

## 6. Exit management

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

None other than the provision of the deliverables listed above

## 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:
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"> <li>▪ DPEL agreed</li> <li>▪ DPEL signed: Supplier, Dept and CO</li> <li>▪ Purchase Order number</li> </ul>	<ul style="list-style-type: none"> <li>▪ Work can start</li> <li>▪ Supplier can invoice for work</li> </ul>

