



Department
for Environment
Food & Rural Affairs

Defra Group Management Consultancy Call off Contract: Defra Project Engagement Letter (DPEL)

Project Delivery Partner (Lot 3)

Completed forms and any queries should be directed to Defra Group Commercial (DgC) at

[REDACTED] Please do not complete this form until you have liaised with DgC, and they have allocated you a lot to access consultancy services including a DPEL reference number.

Engagement details		
DPEL Reference Number	61541_135	
Local Client Reference	N/A	
Extension?	N	
Business Area	Group HR (GCS Transformation Portfolio)	
Programme / Project	HR Automation Programme	
Senior Responsible Officer for Programme/ Project Business Area	[REDACTED]	
Senior Responsible Officer for DPEL	[REDACTED]	
Supplier	Methods Business & Digital Technology	
Title	DDP194 HR Automation Planning Support	
Short description	Review of current Project Plan and knowledge transfer to team on managing a baselined schedule going forward.	
Applicable only if CCN: Summary of changes:	N/A	
Engagement start / end date	Start date 21/10/2024	End date 06/12/2024
Expected costs 24/25	£10,150	
Expected costs 25/26	£	
Base location	London	
Version #	V1	
Version Date	16/10/2024	

By signing and returning this cover note, GCS Transformation accepts the contents of this Project Engagement Letter as being the services required and agrees for Methods Business and Digital Technology 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		

[Redacted Signature Area]

[Redacted Signature Area]

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.

The Business Area considerations are guidance notes for the customer to support their evaluation of the Engagement Letter.

The Engagement will be a fully contracted out service therefore the off-payroll legislation will not apply. A true service will have the following characteristics:

- Delivery is fully outsourced to the supplier, who will have full responsibility for delivering the outcome and the risk of non-delivery sits with the supplier.
- The team is not embedded within your organisation but is engaged, directed, and controlled entirely by the supplier.

It is your responsibility to determine whether your Engagement represents a supply of an outsourced managed service or a supply of resource. The reality of working arrangements should be considered and not just contractual terms.



1. Background

The current HR Automation plan was originally developed as part of the Trestle Programme over a year ago. Methods supported that development alongside a dedicated scheduler and Project Team as part of Trestle. The HR Automation Programme then subsequently featured as part of a Planning Service maturity workstream, where the Project Portal (Microsoft Project) schedule was assessed then an improvement plan was devised (with planning & scheduling training) to align the schedule to Defra standards.

The current requirement is around the need to support the team to baseline the schedule then support the management of the schedule going forward. There has been skill fade from the initial training sessions a year ago within the Project Team. There also needs a reassessment of scope and understanding of dependencies to enable stakeholder agreement to baseline.

2. Statement of services

Objectives and outcomes to be achieved, with each objective linked to the Deliverables section

Objective UID:	Objective	Linked to Deliverable(s)	Outcome(s)
A	Schedule Review: To carry out a review of the current Microsoft Project schedule to evaluate the structure, completeness, accuracy of the planned activities & timelines & the schedule baseline.	D2, D3	<ol style="list-style-type: none"> 1. A clear understanding of in-scope and out-of-scope workstreams (aligned with project goals and deliverables) 2. Analysis of critical path & key milestones assessing their feasibility and interdependencies across the workstreams 3. Assessment of the current schedule's alignment with best practices for baselined schedule management. 4. Feedback on potential scheduling risks such as gaps or overlaps or unrealistic deadlines.
B	Inter-Project Dependencies Analysis: To identify and document inter-project dependencies to ensure alignment across workstreams, mitigate risks of scheduling conflicts to work towards and assure optimisation.	D3	<ol style="list-style-type: none"> 1. Comprehensive identification and documentation of inter-project dependencies, with understanding of how changes/delays in one workstream may impact another. 2. Clear mapping of identified dependencies within the project schedule to improve visibility and understanding. 3. Recommendations for optimized dependency management to prevent delays and scheduling conflicts and ensure alignment with broader project goals.
C	Knowledge Transfer & Training in Schedule Management Best Practices: To equip the team with the skills and knowledge necessary to effectively manage schedules using Microsoft Project, including baselining, tracking progress, and managing changes.	D4	<ol style="list-style-type: none"> 1. Increased proficiency of the team in managing a schedule in Microsoft Project, including the setting & managing a baseline and techniques for tracking progress, managing changes and ensuring accurate forecasting. 2. Guideline recommendations for best practice to effectively manage a schedule provided.



Scope of Services to be provided:

In scope:	<ul style="list-style-type: none"> • Review and validation of the Project Schedule including the six named workstreams. • Identification of in-scope and out-of-scope activities within workstreams. • Analysis of inter-project dependencies and their impact on timelines. • Training sessions for key project management staff on scheduling and baseline management. • Recommendations for managing deviations from the baseline
Out of scope:	<p>The following services are out of scope of this DPEL and would require a Change Control Notice (CCN) or follow on DPEL to provide:</p> <ul style="list-style-type: none"> • direct involvement in making changes to project timelines or delivery dates. • responsibility for managing external vendors or third-party dependencies. • support to any additional workstreams outside Phase two added post-engagement or beyond the initial review

Assumptions and dependencies

Assumptions:	<ol style="list-style-type: none"> 1. PPM service delivery will be aligned with central Defra portfolio directorate standards and HR Automation expectations where applicable. 2. Methods staff will have access to key stakeholders, including the Project Manager and Workstream Managers, who will engage meaningfully and promptly. 3. Relevant stakeholders will participate in pre- and post-workshop self-assessments. 4. All relevant stakeholders will be available for knowledge transfer, with key topics communicated to the Methods team. 5. Leadership across the programme is aligned in approach and thinking, supporting the engagements constructively. 6. Agreed formats for product delivery will be established upfront. 7. Methods staff will have appropriate access to IT systems for extracting relevant information throughout the contract. 8. Any significant changes to the agreed scope will require a Change Control Notice (CCN).
Dependencies:	<ol style="list-style-type: none"> 1. Access to key stakeholders is necessary to deliver the work and meet outcomes. 2. Stakeholder engagement is critical for the success of workshops, assessments, and knowledge transfer. 3. The availability of relevant stakeholders for knowledge transfer and communication of key topics is essential. 4. Timely review and feedback from stakeholders is needed to avoid impacting Methods' delivery windows. 5. There must be identified Project Team members to transfer knowledge related to schedule management. 6. The project requires a detailed stakeholder register and interest/influence analysis to ensure effective stakeholder management.



Risk management

Two layers of risk management shall be considered during this engagement:

- Risk to the service provided by Methods to the Client. These risks shall be recorded and mitigated by Methods team and communicated to the named Point of Contact either through regular governance structure or on an ad-hoc basis should a critical risk be raised.
- Risk to the projects which the Methods team are supporting the Client to deliver will be managed through project level risk processes via the Project Manager. Mitigations will be jointly developed.

Risks identified at this point to be included:

- There is a risk that there could be challenges with stakeholder availability and/or engagement that could impact timeframes.
- There is a risk that wider changes on direction could impact the requirements on the DPEL which could impact value of agreed outcomes and deliverables
- There is a risk that external factors (e.g. Stakeholder information / board decisions etc.) could delay the team's ability to agree to baseline the schedule, impacting Method's engagement and ability to support ongoing management capability as effectively.
- There is a risk that there may be a delay to Methods team gaining Project Online (POL) access which would delay all support work.

3. Deliverables

Project Delivery

Unique ID	Deliverable	Date	Success Criteria	Linked objective
D1	Ongoing Methods Reporting		Methods regular highlight reports covering ongoing progress against all deliverables, outlining any upskilling provided & highlighting any blockers, new risks/issues/dependencies for resolution.	All
D2	POAP		Initial Plan on a Page (POAP) to include all identified high level milestones & to be developed to outline Critical Path alongside the Baseline Plan incorporating relevant assumptions.	A
D3	Project Plan Review		Report review on the current Microsoft Project schedule, highlighting key strengths and areas for improvement. Including assessment of alignment with best practice for baseline schedule management, recommendations for adjustments to the project timeline (if necessary), identification and validation of workstreams in / out of scope & identification of critical path and key milestones, with feedback on risks.	A
D4	Dependency log		Dependency matrix documenting all identified inter-project dependencies, including any recommendations for strategies to improve dependency management and alignment with overall project goals. Updated project schedule with all identified dependencies clearly mapped connections between workstreams and related projects.	B



D5	Knowledge Transfer & Training		Online training session(s) on Microsoft Project schedule management best practices. Training materials/Set of guidelines and best practice materials covering the process for setting and managing a baselined schedule ongoing, reporting deviations and applying corrective action. Coaching sessions focused on techniques for tracking progress, managing changes, and improving forecast accuracy.	C
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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.

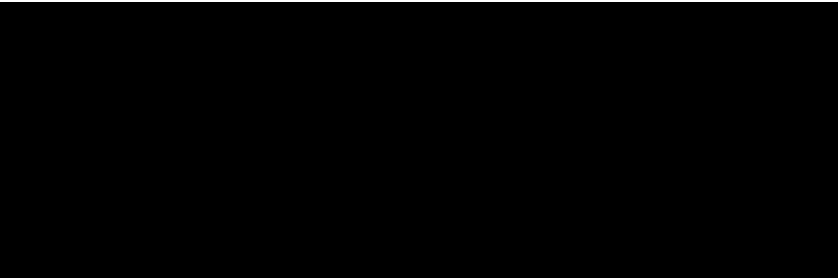
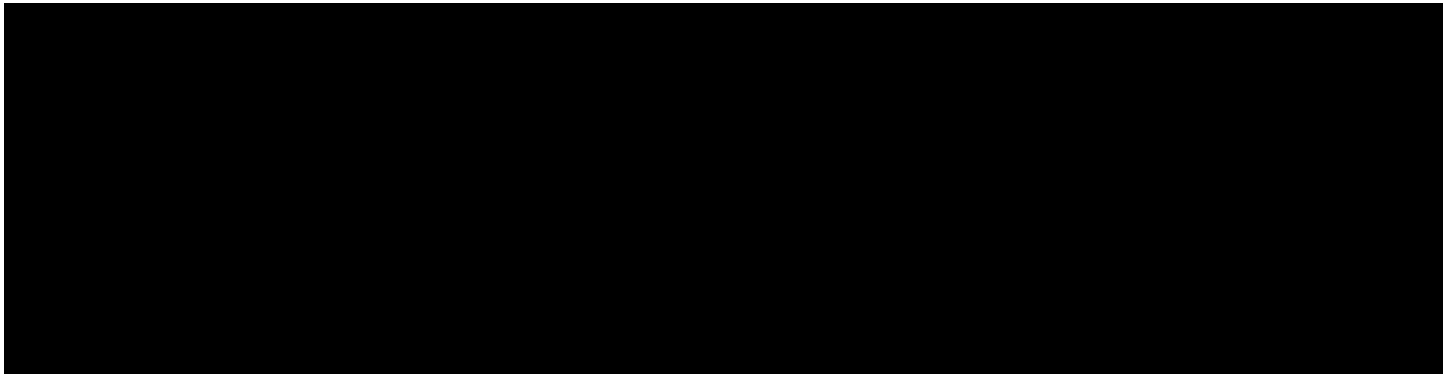
The Project Engagement Letter is the agreed contract of work between the Defra Group Business Area and the Supplier and can be varied under the change control process. Any changes to timescales, scope and costs will require consultation with DgC and subsequent relevant approvals.

4. Delivery management

Supplier Delivery Team

The outcomes-based nature of consultancy services provided through Lot 3 (Ref 28595) dictates that the Supplier retains responsibility and authority to provide the delivery team required to meet the contracted outcomes. The Business Area team should manage any performance concerns directly with the Supplier Team in the first instance with escalation, where necessary, through Defra Group Commercial.

The actual resources used in the delivery may be greater or less than that on which the price is based as the work is undertaken at the Supplier's risk. Should factors materialise that impact successful delivery, through factors outside the Supplier's control that warrant an alteration to time or cost, a change control will be made to this document.





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5. 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 £10,150 exclusive of expenses and excluding VAT.

This total represents the agreed fixed price of the Supplier for the successful delivery of the contracted outcomes. The fees are based on the expected delivery team using the set framework rates. DgC review the resources and rates as part of commercial due diligence and sign-off.

Stage	Due (link to milestone dates)	Cost
Project Close Criteria met to trigger payment: All agreed deliverables handed over & all outcomes achieved.		£10,150
Grand Total		£10,150
Expenses		
Note: Expenses to the base location as determined for each individual assignment should be included in the rates. Expenses up to 10% of the total DPEL value to other locations will be paid in line with the Client Departments Travel and Subsistence policy and must be approved in advance.		

Payment

The Supplier should invoice at project stage milestones set out in section 4. Defra Group will reimburse fees on confirmation of approval of work delivered, by the Business Area.



6. Governance and reporting

Business Area to outline governance and report requirements relevant to the Engagement through Key Performance Indicators below:

Key Performance Indicators

Business Area and Supplier to agree any specific key performance indicators related to this specific project engagement.

KPI	KPI Requirement	Description	Reporting Frequency	Who Measures	Method of Measurement	Performance Target
1.	Availability of Methods	A named delivery contact or delegate will be available to the client for discussions within and outside of DPEL content during working hours.	Ongoing for duration of DPEL	SRO or delegate, with Methods Assurance	Escalation from client team if expected behaviour is not demonstrated	Measured against DPEL & Methods Lot3 agreement.
2.	Regular checkpoints provided by Methods	Weekly reporting to ascertain delivery progress, key risks/concerns	Weekly	SRO with Methods Assurance	Regular project meetings or telecons	Measured against DPEL deliverables.
3	Delivery of agreed deliverables	These will not be exceeded above agreed tolerance without agreement between all parties	Weekly	SRO or delegate, with Methods Assurance	Regular project meetings or telecons	Measured against DPEL deliverables.

Feedback and satisfaction

Business Area and Supplier to agree regular reporting intervals for the duration of the engagement.

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 must be completed as part of the Engagement sign-off. DgC will contact the Business Area to arrange this and share the feedback with the supplier on a bi-monthly basis.

Non-disclosure agreements

The overarching MCF2 framework includes NDAs.



7. Exit management

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

Upon exiting the project engagement, the Supplier will provide all final deliverables alongside supporting handover documents. The exit terms are as detailed in the call off contract framework document.

Handover of all operational Project and Programme documentation and data held in Project Portal. Plus effective knowledge transfer to Defra staff including Project handover briefs – written and oral.

Notice period

The nature of these engagements requires 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.

Supplier Engagement Process

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 £120k or DgC Corporate Services Delivery Board if under £120k.
2. If over £120k the Spend Control Form must be completed by Business Area and submitted to DgC at:
[REDACTED]
3. 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.
4. A Project Engagement Letter is completed by the Business Area with input from the Supplier (with supporting proposals as appropriate) and support from DgC and then finally agreed between the two parties, including

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

evidence of all required approvals either being in place or being progressed. Approval states are: