Completed forms and any queries should be directed to [fst-consultancy@cabinetoffice.gov.uk](mailto:fst-consultancy@cabinetoffice.gov.uk)

Please complete the form in accordance with the guidance and structures in the template. For queries on completing the form please contact the External Support team via the FST mailbox or your allocated Engagement Lead.

If the form is not drafted in accordance with the guidance, it will not be approved.

|  |  |  |  |
| --- | --- | --- | --- |
| **Engagement details** | | | |
| **Engagement ref #** | External Support Team to provide when initial Request Form received | | |
| **Extension?** | Y/N | **Ref** | Previous PEL reference numbers |
| **Department / Area** | Department / Directorate / Function / Unit / Programme or project | | |
| **Supplier** |  | | |
| **Title** | Title of work to be delivered | | |
| **Engagement start / end date** | Proposed start date DD/MM/YYYY | | Proposed end date DD/MM/YYYY |
| **Expected costs 20/21** | £Total Engagement Costs (to be less than approved funds) | | |
| **Expected costs 21/22** | £Total Engagement Costs (to be less than approved funds) | | |
| **Evidence of Internal Approval** | Attach evidence of HR approval to use consultancy and Commercial/ Finance approval for budget and this route to market. | | |
| **Dept. PO reference** | Dept. PO reference # (**Supplier to charge direct to department**) | | |
| **Lot #** | Lot 1 / 2 / 3 | | |
| **Version #** | Start at 0.1, 1.0 when approved, increment from 1.0 for Change requests | | |

|  |
| --- |
| By signing and returning this cover note, [enter Department name] accepts the contents of this Work Package Agreement as being the services required and agrees for [enter Supplier name] to provide the services in accordance with the Statement of Requirements under the overarching contract (Lot 1 / 2 - Ref CCCC20A01, Lot 3 - Ref CCCC18B08) with the Cabinet Office and confirms the availability of funding to support recharge for the services |

|  |  |  |
| --- | --- | --- |
| **Signatures** | | |
| **Supplier** | **Department** | **Cabinet Office /External Support Team** |
| By: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  *Signature* | By: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  *Signature* | By: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  *Signature* |
| or and on behalf of [Supplier]  [Insert name]  [Insert role] | For and on behalf of [Department]  [Insert name]  [Insert role] | Cabinet Office / External Support Team  Insert name  Insert role |
| [Insert date] | [Insert date] | [Insert date] |
| Supplier engages with Department to complete. Once agreed, Supplier signs front page and sends to Department | Department signs front page and sends to External Support Team | On approval,External Support Team signs and returns copy to Department and Supplier |

Supplier contact: [Insert name and contact details]

Department contact: [Insert name and contact details]

***General instructions***

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| The Work Package Agreement describes the services required and provided. When completing the Work Package Agreement 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 *departmental considerations* are guidance notes for the customer to support their evaluation of the Work Package Agreement. |

**1. Background**

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| --- |
| Briefly outline why support is required:   * Establish the context and describe the wider programme as well as the issues and risks * Explain how and why the work supports EU Exit * Describe how the work aligns to EU Exit timelines (e.g. pre-exit planning and post-exit implementation) * Outline the supplier’s role and why it is critical   *Departmental considerations:*  Are the timelines sensible (financial and business justification for duration)? |

**2. Statement of services**

**Objectives and outcomes to be achieved**

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| --- |
| State and describe the aims of the engagement:   * Clearly distinguish between ‘objectives’ and ‘outcomes’ * The objective/s should state the specific products and activities that will be delivered * The outcomes should describe what the results will look like and the benefits they will illicit * Objectives and outcomes should be measurable   *Departmental considerations:*   * Do the objectives and outcomes align to the original request and internal business case? |

**Scope**

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| --- |
| Define the works *(SMART):*   * Maintain the context outlined in the prior sections i.e. timeframes and deliverables should be considerate of EU Exit * Establish the deliverables, including ‘who’, ‘what’, ‘where’, ‘when’, ‘how’ etc. * Outline the full expected extent of support including, the specific contributions of this engagement and how that fits into the overall programme * Reference the relevant assumptions and dependencies * Produce a high level plan with dates, deliverables and relevant phases * \*Define the handover and transition including how the engagement will migrate to BAU * Identify any potential further phases and extensions and how these will be managed * If a discovery phase is required to inform the scope reflect this in the works and add a checkpoint for clarifying and confirming the scope   \*How will you ensure knowledge capture and an effective overall transition and handover of services? **Mandatory requirement**  *Departmental considerations:*   * Is there a defined scope (defined deliverables)? * Are the critical success factors clear (dependencies, inputs and risks)? * Is there a handover & transition plan (exit management, lessons learned and skills capture)? * What is the supplier accountable for, how it will be assured that is delivered and are you clear what you need to assist delivery |

**Assumptions and dependencies**

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| --- |
| Provide further description of the assumptions and dependencies:   * Highlight any assumptions and dependencies that impact delivery e.g. shared infrastructure, other departmental input, recruitment etc. * Summarise the impacts * Describe how the assumptions and dependencies will be managed   *Departmental considerations:*  Are the assumptions and dependencies manageable? |

**Deliverables**

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| --- |
| Describe what the supplier will produce:   * Outline and describe the specific outputs * Outline what standards and formats apply * Ensure deliverables are quantifiable * Define the acceptance criteria * Note there should be clear alignment between the objectives, deliverables and fees   Outline the specific deliverable(s), including milestones and dates, for knowledge capture, transition and handover. **Mandatory requirement**  *Departmental considerations:*   * Are the deliverables suitable for measuring performance, success and benefits? |

|  |  |  |
| --- | --- | --- |
| **Deliverable** | **Milestone / Date** | **Owner** (who in the consultancy delivery team?) |
| **Stage A** | | |
|  |  |  |
|  |  |  |
| **Stage B** (additional stages can be added) | | |
|  |  |  |
|  |  |  |

**Limitations on scope and change control**

Department / Supplier to supplement with any additional areas, as deemed appropriate.

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 Department.

The Work Package Agreement is the agreed contract of work between the Cabinet Office, Department and Supplier and can be varied under the change control process. Any changes to timescales, scope and costs will require approval by the External Support Team.

**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** | **# of days** | **Cost** |
|  |  |  |  |  |  |
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| --- | --- |
| **Total resource**  **Total days\***  **Engagement Length\*\***  \*Total days worked across all resources  \*\*Total working days in engagement |  |

**Department’s team**

|  |
| --- |
| Outline departmental staff allocated to support delivery team in completing the engagement including names, roles, responsibilities and any dependencies / scope they will deliver. |

**4. Fees**

The [Departmentl] will reimburse the Supplier for approved work done according to the table below. The total fees for the scope of work detailed in this Work Package Agreement will be £[Insert Total], inclusive of expenses and excluding VAT.

Provide costs for any particular stages to the engagement.

|  |  |  |
| --- | --- | --- |
| **Stage** | **Cost** | **Due** (link to milestone dates) |
| **A** |  | **DD/MM/YY** |
| Outline details of outputs/deliverables required to initiate invoice and payment thereof | £ value to pay |  |
| **B** (additional stages can be added) |  |  |
| Outline details of outputs/deliverables required to initiate invoice and payment thereof | £ value to pay |  |
| **Expenses** |  |  |
| (Brief details of expenses) | £ |  |
| **Grand total** | £ |  |

*Departmental considerations:*

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

**Expenses statement**

The Cabinet Office overarching contract rates include expenses for any travel to/from any UK location defined by the Department as the base office for the work. Only expenses for travel at departmental request from this base can be charged. If appropriate, define permissible expenses to be charged.

**Payment**

The Supplier should invoice fees monthly in arrears. VAT will be added to fees at the prevailing rate. The [Department] will reimburse fees monthly on confirmation of approval of work delivered by the Department. All invoices submitted to the department for payment will also be provided to the Cabinet Office via fst-consultancy@cabinetoffice.gov.uk. 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**

Department to outline governance and report requirements.

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

* Completion of the time tracker on a monthly basis, to track days worked by our consultants;
* [Other Department reporting requirements to be agreed]

**Feedback and satisfaction**

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

The Cabinet Office reserves the right to hold a 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 client departments rate the services provided.

**Non-disclosure agreements**

Any NDA requirements are to be agreed on a case by case basis between the Department and the Consultancy Provider.

**Notice period**

The nature of these engagements require that the Department / Cabinet Office have the ability to terminate an engagement with notice. The Department or the Cabinet Office’s termination rights for this engagement are marked below.

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

Where the Department or the Cabinet Office terminate an engagement, agreed costs incurred to the end of the notice period will be reimbursed.

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| 1. Department identifies a potential need for delivery support, initiates a conversation with External Support Team, confirms which approvals are required for an engagement to occur 2. Request Form completed by department and submitted to External Support Team at:   [fst-consultancy@cabinetoffice.gov.uk](mailto:fst-consultancy@cabinetoffice.gov.uk)   1. The form is reviewed by the External Support Team to consider which resource route is most appropriate and may request additional information/edits from department if required 2. Lot / Supplier is selected and briefed on the request by External Support Team, then introduced to the requesting department for further discussion and confirmation of work to be delivered 3. A Work Package Agreement is completed by the supplier and agreed with the department, including evidence of all required approvals either being in place or being progressed (e.g. PO) and forwarded to the External Support Team for review by Decisions Board. Approval states are:  |  |  |  | | --- | --- | --- | | **Approval state** | **Definition** | **Permissions** | | **Full approval** | * WPA agreed * WPA signed: Supplier, Dept and CO * Purchase Order number | * Work can start * Supplier can invoice for work | | **Approval in principle** | * Confident WPA is on track or WPA agreed * Reliable confirmation from Dept that internal approvals / funding in place as no PO number | * CO gives supplier permission to work at risk if they choose * Dept required to complete Full approval ASAP * Supplier can’t invoice until Full approval | |

