



**HM Revenue  
& Customs**

**HM Revenue & Customs**

100 Parliament Street

Westminster

London SW1A 2BQ

and

**Cranfield Management Development Ltd**

Building 111 SoM

College Road

Cranfield

Bedford

MK43 0AL

Commercial Directorate Ref: CATA Programme External Training Resource SR247253968

## **Form of Agreement**

### **Schedules**

Schedule A	Service Order
Schedule B	Service levels and KPIs
Schedule C	Not Applicable - Contract Management Plan and Management Information
Schedule D	Not Applicable - Exit Management Plan
Schedule E	Terms and Conditions (Supplier's and HMRC specific)
Schedule F	Data Processing and List of Sub-Processors
Schedule G	Cost Schedule

## Form of Agreement

This Agreement is made between Her Majesty's Revenue and Customs (the Client) of 100 Parliament Street, Westminster, London, SW1A 2BQ and Cranfield Management Development Ltd (the Contractor) whose main or registered office is at Building 111 SoM, College Road, Cranfield, Bedford, MK43 0AL, together referred to as "the Parties" and is effective as of 9 July 2019 ("Commencement Date")

It is agreed that:

This Form of Agreement together with the Terms and Conditions and Schedules are the documents that collectively form the "Contract".

The Contract effected by the signing of this Form of Agreement constitutes the entire agreement between the Parties relating to the subject matter of the Contract and supersedes all prior negotiations, representations or understandings whether written or oral.

Signed for and on behalf of:

	<b>HM Revenue &amp; Customs:</b>		<b>Cranfield Management Development Ltd</b>
Signature:		Signature:	
Name:		Name:	
Capacity:		Capacity:	
Date:		Date:	
Address:		Address:	
Telephone:		Telephone:	
email:		email:	

## Schedule A Service Order

HM REVENUE & CUSTOMS SERVICE ORDER	
<b>A1. HMRC Information</b> Purchase Order to be issued under separate cover	
CD Reference:	CATA Programme External Training Resource SR247253968
Purchase / Limit Order No	
Material Group: <small>For HMRC use only</small>	80111501
<b>HMRC Commercial Contact</b>	
Name:	Not Applicable
Contact Telephone No.:	
email:	
<b>HMRC Work Manger</b>	
Name:	Redacted FOIA 2000 S41
Contact Telephone No.:	Redacted FOIA 2000 S41
Contact Address:	Redacted FOIA 2000 S41
email:	Redacted FOIA 2000 S41
HMRC Authorised Officer: <small>(Sponsor/Budget Approver/Invoicing &amp; timesheets)</small>	Redacted FOIA 2000 S41
<b>A2. Contractor Information</b>	
Vendor (Supplier):	Cranfield Management Development Ltd
Contact:	Redacted FOIA 2000 S41
Contact Tel No:	Redacted FOIA 2000 S41
Contact Address:	Redacted FOIA 2000 S41
email:	Redacted FOIA 2000 S41
Contractor / Key Personnel:	
<b>A3. Contractual Detail</b>	
Special Terms and Conditions: e.g. overtime, expenses, travel & subsistence, notice period.	The Client travel and expenses policy shall over-ride the Contractor travel and expenses policy, in the event of the Contractor travel and expenses charge being higher than the Client maximum rates payable, as specified at the Expenses section

<b>A4. Project Information</b>	
Project Title	CATA Programme External Training Resource
Primary Location: (including full address)	Redacted FOIA 2000 S41
Start Date:	22 July 2019
End Date:	9 August 2019

<b>A5. Commercial Detail</b>	
Provision of 3 days leadership training to 24 delegates	Redacted FOIA 2000 S43
Provision of Learning Styles and Situational Leadership to 24 delegates Case studies	Redacted FOIA 2000 S43
<b>Grand Total (£)</b> exclusive of VAT:	Redacted FOIA 2000 S43

HMRC operates an Enterprise Resource Planning (electronic trading/ordering) system and has a Purchase Order Mandatory Policy. Suppliers will be required to provide information so that they can be adopted onto the system. Payment will be made by BACS within 30 days of receipt of valid invoice.

Please submit the invoice on completion of the training, and within 30 days of completion.

Invoices should be sent to Redacted FOIA 2000 S41

All invoices should include Purchase Order details. Invoices received without a Purchase Order number may be rejected.

**A6.**

**Specification of Requirements / Role Description / Deliverables**

The section below should be used to provide clear details relating to the requirements for delivery of the project/assignment. It should include, where appropriate, milestones / key deliverables with dates, and proposals for skills transfer.

Provision by Redacted FOIA 2000 S41 of 3 days leadership training, to include Learning Styles and Situational Leadership training and case studies.

The training shall be delivered at Redacted FOIA 2000 S41 on 24<sup>th</sup>, 25<sup>th</sup> and 26<sup>th</sup> July 2019, and comprise of approximately 24 hours training in total over the 3 days.

A preparatory meeting to discuss requirements and expectations, including times of the training on each day and provision of some limited materials, will be required prior to commencement of training delivery. Time and date of the meeting to be agreed between the parties.

## Expenses

The aim of HMRC is to make our travel practices more sustainable by:

- reducing our business travel footprint;
- choosing alternatives to travel (such as telephone or video conference);
- adopting more sustainable ways of travelling when it is necessary to do so (public transport over private vehicles).

**To help HMRC meet its target of reducing carbon emissions from business travel by at least 10% please consider:**

1. Avoiding travel by using telephone and video conferencing as the default medium.
2. Only using private cars as the last option after public transport and hire cars.
  - Travel to and from the Primary Location will be met from the day rate.
  - Expenses are payable where travel to other locations is required as part of the assignment forming part of this agreement. Where an overnight stay is required HMRC will pay for actual bed and breakfast costs within the current maximum limits detailed below. Any other subsistence or incidental expenses are not payable. Receipts must be provided.

<b>Short-term Night Subsistence Allowances</b> <b>Bed &amp; Breakfast Capped Rates</b> Effective from 01/04/17	
Location	Maximum Nightly Rate
London / within M25 (excluding Heathrow Airport)	£130
Bristol; Heathrow Airport	£100
Oxford; Portsmouth	£95
Elsewhere in UK	£90
<b>Travel</b>	
Mileage Allowance	45 pence per mile
Rail Travel	Standard Class
Air Travel	Economy Class

- Hotel Reservation and Tickets shall be booked via HMRC's travel and hotel booking service. Further information will be provided by the HMRC Work Manager. Bookings should always be approved by the HMRC Work Manager.
- All other expenses will be payable at the discretion of HMRC. The Contractor shall not incur any such expenses without the prior approval of the HMRC Work Manager. Any expense incurred by the Contractor without prior approval shall not be reimbursed.

## **Schedule B      Service levels and KPIs**

The trainer, Redacted FOIA 2000 S41, is required to deliver training comprising of approximately 24 hours in total, over 3 days from 24<sup>th</sup> to 26<sup>th</sup> July 2019.

Performance will be gauged on classroom observation by programme director and post session Level 1 feedback by delegates.

The trainer will provide some limited materials. These will be agreed during the preparatory meeting.



## **Schedule C Information**

## **Contract Management Plan and Management**

Not Applicable

## **Schedule D      Exit Management Plan**

Not Applicable

## **Schedule E      Terms and Conditions**

### **Supplier Terms & Conditions (attachment)**



T&C CMDL (May  
2018) - Updated GDI

### **HMRC Terms and Conditions GDPR (attachment)**

These are the Supplier Terms and Conditions with additional wording from HMRC Solicitor's Office to reflect the exact provisions required in HMRC contracts to meet the requirements of GDPR.



HMRC Solicitor's  
Office amends T&C

## Schedule F Data Processing and List of Sub-Processors

This Schedule lists the types of Personal Data which the Supplier will Process in its provision of the Services, and the categories of Data Subject, together with a description of the nature, purposes and duration of the Processing, the subject matter of the Processing, and the retention policy in respect of that data.

Description	Details
Subject matter of the processing	The Senior Leadership Programme is an advanced leadership course aimed at the senior tax administrators at or with the potential to reach the highest levels in their organisation. The 24 delegates will be arriving in the UK to attend this 2019 CATA (Commonwealth Association of Tax Administration)
Duration of the processing	Three days 24 <sup>th</sup> , 25 <sup>th</sup> and 26 <sup>th</sup> July 2019
Nature and purposes of the processing	<p>A list of delegate names will be e-mailed to the Contractor. Expectations are the list may be stored onto the Contractor's internal systems, be printed out for use by the trainer in the classroom setting and kept as an electronic copy on the trainer's personal computer.</p> <p>The purpose is leadership training for senior officials from Commonwealth tax authorities. The training programme enhances personal leadership skills, and broadens strategic horizons through exposure to the latest thinking in taxation.</p>
Type of personal data	The information made available to the Contractor is limited solely to the names of the delegates. This is purely for communication purposes within the classroom setting.
Categories of data subjects	Training course delegates - Tax Officials from the Commonwealth countries

<p>Plan for return and destruction of the data once the processing is complete</p> <p>UNLESS requirement under UK Law or EU or member state law to preserve that type of data</p>	<p>The Contractor will be instructed to delete all data after the course has been completed.</p>
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## **Schedule G Cost Schedule (attachment)**

Redacted FOIA 2000 S43