

**Crown Commercial Service**

---

**Call Off Order Form for Management Consultancy Services**

---

**Independent Review of Customer Service**

**Project\_4503**

## FRAMEWORK SCHEDULE 4

### CALL OFF ORDER FORM

#### PART 1 – CALL OFF ORDER FORM

#### SECTION A

This Call Off Order Form is issued in accordance with the provisions of the Framework Agreement for the provision of **Lot 4 Strategic Consultancy Services** dated **04 September 2018**.

The Supplier agrees to supply the Services specified below on and subject to the terms of this Call Off Contract.

For the avoidance of doubt this Call Off Contract consists of the terms set out in this Template Call Off Order Form and the Call Off Terms.

Order Number	<b>TBC</b>
From	<b>The Education and Skills Funding Agency (ESFA) on behalf of the Secretary of State for Education ("CUSTOMER")</b>
To	<b>PA CONSULTING SERVICES LIMITED ("SUPPLIER")</b>
Date	<b>23<sup>rd</sup> September 2020 ("DATE")</b>

#### SECTION B

##### 1. CALL OFF CONTRACT PERIOD

1.1.	<b>Commencement Date: 23<sup>rd</sup> September 2020</b>
1.2.	<b>Expiry Date:</b>  End date of Initial Period: <b>22<sup>nd</sup> December 2020</b>  End date of Extension Period: <b>22<sup>nd</sup> December 2021</b> should the Department exercise its option to extend  Minimum written notice to Supplier in respect of extension: <b>30 days</b>

## 2. SERVICES

<b>2.1.</b>	<b>Services required:</b>  As detailed in Schedule 1 of this Call Off Order Form
-------------	--

## 3. PROJECT PLAN

<b>3.1.</b>	<b>Project Plan:</b>  As detailed in Schedule 2 of this Call Off Order Form
-------------	---

## 4. CONTRACT PERFORMANCE

<b>4.1.</b>	<b>Standards:</b>  As detailed in Schedule 1 of this Call Off Order Form
<b>4.3</b>	<b>Critical Service Level Failure:</b>  Not applied
<b>4.4</b>	<b>Performance Monitoring:</b>  As detailed in Schedule 1, paragraph 8 of this Call Off Order Form
<b>4.5</b>	<b>Period for providing Rectification Plan:</b>  In accordance to Clause 39.2.1(a) of the Call Off Terms

## 5. PERSONNEL

<b>5.1</b>	<b>Key Personnel:</b>  <b>Redacted</b> – assignment lead <b>Redacted</b> – best practice innovation, field research and workshop delivery <b>Redacted</b> – overall responsibility for delivery
<b>5.2</b>	<b>Relevant Convictions</b> (Clause 28.2 of the Call Off Terms):  Not applied

## 6. PAYMENT

<b>6.1</b>	<b>Call Off Contract Charges</b> (including any applicable discount(s), but excluding VAT):  In Annex 1 of Call Off Schedule 3 (Call Off Contract Charges, Payment and Invoicing)
------------	---

	<p>As per the customer's requirements, the supplier will provide the following roles:</p> <p><b>Redacted</b></p> <p>The following pricing will apply for each deliverable:</p> <p>Full details of each deliverable are listed at Section 3 of Schedule 1 Services Required of this Call Off Order Form.</p> <p><b>Redacted</b></p>
<p><b>6.2</b></p>	<p><b>Payment terms/profile</b></p> <p>In Annex 2 of Call Off Schedule 3 (Call Off Contract Charges, Payment and Invoicing)</p> <p>Method of payment - BACS</p> <p>Payment shall be made in accordance with the following payment mechanism based on the agreed deliverables listed at section 6.1 Call Off Contract Charges of this Call Off Order Form Invoices shall be submitted to the project coordinator in arrears in two stages.</p> <p><b>Stage 1 - Redacted</b></p> <p><b>Stage 2 - Redacted</b></p> <p>Payment can only be made following satisfactory delivery of pre-agreed certified deliverables.</p> <p>Before payment can be considered, each invoice must include a detailed elemental breakdown of work completed and the associated costs.</p>
<p><b>6.3</b></p>	<p><b>Reimbursable Expenses:</b></p> <p>Not permitted</p>
<p><b>6.4</b></p>	<p><b>Customer billing address</b> (paragraph 7.6 of Call Off Schedule 3 (Call Off Contract Charges, Payment and Invoicing)):</p> <p>The ESFA  Accounts Payable,  ASC Purchasing  Cheylesmore House,  Quinton Road  Coventry, CV1 2WT</p>

	<p>All invoices should be emailed directly to:  <a href="mailto:accountspayable.OCR@education.gov.uk">accountspayable.OCR@education.gov.uk</a></p> <p>All invoices must quote the PO number in full</p>
<b>6.5</b>	<p><b>Call Off Contract Charges fixed for</b> (paragraph 8.2 of Schedule 3 (Call Off Contract Charges, Payment and Invoicing)):</p> <p>3 Call Off Contract Months from the Call Off Commencement Date, which can be extended for a further 12 months by agreement.</p>
<b>6.6</b>	<p><b>Supplier periodic assessment of Call Off Contract Charges</b> (paragraph 9.2 of Call Off Schedule 3 (Call Off Contract Charges, Payment and Invoicing)) will be carried out on:</p> <p>Not applied</p>
<b>6.7</b>	<p><b>Supplier request for increase in the Call Off Contract Charges</b> (paragraph 10 of Call Off Schedule 3 (Call Off Contract Charges, Payment and Invoicing)):</p> <p>Not Permitted</p>

## 7. LIABILITY AND INSURANCE

<b>7.1</b>	<p><b>Estimated Call Off Contract Charges:</b></p> <p>Redacted</p>
<b>7.2</b>	<p><b>Supplier's limitation of Liability</b> (Clause 37.2.1 of the Call Off Terms);</p>
<b>7.3</b>	<p><b>Insurance</b> (Clause 38.3 of the Call Off Terms):</p> <p>In accordance with RM6008 MCF2 framework agreement v2, Schedule 14, Annex 1</p>

## 8. TERMINATION AND EXIT

<b>8.1</b>	<p><b>Termination on material Default</b> (Clause 42.2 of the Call Off Terms):</p> <p>In Clause 42.2.1(c) of the Call Off Terms</p>
<b>8.2</b>	<p><b>Termination without cause notice period</b> (Clause 42.7 of the Call Off Terms):</p> <p>In Clause 42.7 of the Call Off Terms as amended at section 2.1.3.1 of the Invitation to Tender (ITT) - Independent Review of Customer Service document</p>
<b>8.3</b>	<p><b>Undisputed Sums Limit:</b></p> <p>In Clause 43.1.1 of the Call Off Terms</p>
<b>8.4</b>	<p><b>Exit Management:</b></p> <p>Not applied</p>

## 9. SUPPLIER INFORMATION

<b>9.1</b>	<b>Supplier's inspection of Sites, Customer Property and Customer Assets:</b> Not applied
<b>9.2</b>	<b>Commercially Sensitive Information:</b> Not applied

## 10. OTHER CALL OFF REQUIREMENTS

<b>10.1</b>	<b>Recitals</b> (in preamble to the Call Off Terms): Recitals B to E Recital C - date of issue of the Statement of Requirements: 28/07/2020 Recital D - date of receipt of Call Off Tender: 17/08/2020
<b>10.2</b>	<b>Call Off Guarantee (Clause 4 of the Call Off Terms):</b> Not required
<b>10.3</b>	<b>Security:</b> In accordance with Call Off Schedule 7 Short Form
<b>10.4</b>	<b>ICT Policy:</b> Not applied
<b>10.6</b>	<b>Business Continuity &amp; Disaster Recovery:</b> Not applied
<b>10.7</b>	<b>NOT USED</b>
<b>10.8</b>	<b>Protection of Customer Data</b> Customer data to be protected in accordance to Clause 35.2 of the Call Off Terms
<b>10.9</b>	<b>Notices</b> (Clause 56.6 of the Call Off Terms): Customer's postal address and email address: Cheylesmore House, Quinton Road Coventry, CV1 2WT <b>Redacted</b>  Supplier's postal address and email address: PA Consulting 10 Bressenden Place London SW1E 5DN <b>Redacted</b>
<b>10.10</b>	<b>Transparency Reports</b>

	In Call Off Schedule 13 (Transparency Reports) Not applied
<b>10.11</b>	<b>Alternative and/or Additional Clauses from Call Off Schedule 14 and if required, any Customer alternative pricing mechanism:</b> Not applied
<b>10.13</b>	<b>Publicity and Branding (Clause 36.3.2 of the Call Off Terms)</b> Not applied
<b>10.14</b>	<b>Staff Transfer</b> Annex to Schedule 10, List of Notified Sub-Contractors (Call Off Tender). Not applied
<b>10.15</b>	<b>Processing Data</b> Call Off Schedule 17 Customer Data Protection Officer: <b>Redacted</b> <b>Redacted</b> <b>Redacted</b> Supplier Data Protection Officer:  <b>Redacted</b> <b>Redacted</b> <b>Redacted</b>
<b>Contract Reference:</b>	<b>TBC</b>
<b>Date:</b>	<b>22/09/2020</b>
<b>Description Of Authorised Processing</b>	<b>As per Schedule 17 of the Call Off Terms</b>
Identity of the Controller and Processor	Data Controller is ESFA  Data Processor is PA Consulting Services Ltd
Use of Personal Data	Customer Service is procured and managed in siloes across the ESFA resulting in operational and commercial inefficiencies. Customer Service Journeys are designed and delivered in isolation restricting opportunities to a deliver a better and more 'joined up' service for our individual customer groups. Currently teams are too often addressing the same or similar users' needs independently of each other. Furthermore, performance indicators are different across a number of areas making it hard to accurately and evaluate,

	<p>challenge and improve the overall quality and cost of service that we provide.</p> <p>This initiative is to provide external advice by commissioning a short two-three-month review of all existing customer service provision within the ESFA. Receive recommendations based upon industry best practice, performance and cost benchmarks and on whether we should follow a centralised or de-centralised customer service model and inform an organisation design to support the above.</p>	
Duration of the processing	For the duration of the Framework Contract plus 7 years.	
Nature and purposes of the processing	<ul style="list-style-type: none"> <li>• Review our existing customer service offerings and evaluate against industry best practice both in public and private sector.</li> <li>• Better define, in the context of the work that we do and the groups that we serve, what is excellent customer service and when it is best achieved via voice to voice or digital first routes for example.</li> <li>• Provide ESFA with a clearer centralisation versus de-centralisation, in-source versus out-source strategy.</li> <li>• Inform a strategy for what customer service should be delivered through which channel and the KPIs that should be used to measure its success.</li> </ul>	
Type of Personal Data	<p>Full name</p> <p>Workplace address</p> <p>Workplace Phone Number</p> <p>Workplace email address</p> <p>Job Title</p>	
Categories of Data Subject	DfE Staff Data	

## FORMATION OF CALL OFF CONTRACT

**BY SIGNING AND RETURNING THIS CALL OFF ORDER FORM (which may be done by electronic means) the Supplier agrees to enter a Call Off Contract with the Customer to provide the Services in accordance with the terms Call Off Order Form and the Call Off Terms.**

**The Parties hereby acknowledge and agree that they have read the Call Off Order Form and the Call Off Terms and by signing below agree to be bound by this Call Off Contract.**

**In accordance with paragraph 7 of Framework Schedule 5 (Call Off Procedure), the Parties hereby acknowledge and agree that this Call Off Contract shall be formed when the Customer acknowledges (which may be done by electronic means) the receipt of the signed copy of the Call Off Order Form from the Supplier within two (2) Working Days from such receipt.**

### For and on behalf of the Supplier:

Name and Title	Redacted
Signature	Redacted
Date	Redacted

### For and on behalf of the Customer:

Name and Title	Redacted
Signature	Redacted
Date	Redacted

## Schedule 1 – Services Required

### 1. DEFINITIONS AND ACRONYMS

Expression or acronym	Meaning
ESFA	Education and Skills Funding Agency
CEDD	Customer experience, Digital and Data Directorate
DfE	Department for Education
GOV.UK	<b>GOV.UK</b> is the website for the <b>UK</b> government. It is the best place to find government services and information. The site is maintained by the Government Digital Service (GDS).

### 2. THE REQUIREMENT

Redacted

### 3. KEY MILESTONES

Redacted

### 4. REPORTING

- 4.1. Included within the Key Milestones table (section 3.1) are the products to be delivered as part of this programme of work. This includes the requirement for written reports and presentations which form the measurable outcomes against the services being commissioned.

### 5. CONTINUOUS IMPROVEMENT

- 5.1. The supplier will be expected to make any recommendations which will improve the way in which the required Services are to be delivered throughout the contract duration.
- 5.2. Changes to the way in which the services are to be delivered must be brought to the Authority's attention and agreed prior to any changes being implemented.

### 6. ACCREDITATION

- 6.1. No specific accreditation is deemed appropriate for this procurement, however you **must** have experience of customer service organisation design within at least one large organisation from the private sector.

### 7. STAFF AND CUSTOMER SERVICE

- 7.1. The provider's staff assigned to the contract shall have the relevant experience of customer service provision to deliver the contract.

## **8. SERVICE LEVELS AND PERFORMANCE**

**Redacted**

## Schedule 2 - Project Plan

Redacted

## **ANNEX 1**

**Redacted**