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## Defra Group Management Consultancy Framework: Project Engagement Letter

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 #	35045				
Extension?	N	DPEL Ref.	DPEL_61541_014		
Business Area	Defra Group Property				
Programme / Project	WP&FM24 Project				
Senior Responsible Officer	Richard Jackson				
Supplier	Methods Consulting Ltd				
Title	WP&FM24 Target Operational Model Design & Digital Strategy				
Short description	ICT workstream of FM contract replacement programme				
Engagement start / end date	Proposed start date 04/01/2022	Proposed end date 25/03/2022			
Funding source	Current in year funding				
Expected costs 21/22	£95,402 (to be less than approved funds)				
Expected costs 22/23	£NA (to be less than approved funds)				
Expected costs 23/24	£NA (to be less than approved funds)				
Dept. PO reference	Dept. PO reference # (to allow for Defra Group recharge)				
Lot #	Lot 3				
Version #	V0.1 Start at 0.1, 1.0 when approved, increment from 1.0 for Change requests				



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## Approval of Project Engagement Letter

By signing and returning this cover note, [Defra Group Property ] accepts the contents of this Project Engagement Letter as being the services required and agrees for [Methods] 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		
Supplier	Business Area	Defra Group Commercial
<p>DocuSigned by: <i>Laurence Wells</i> 9A660465D6054CC...</p> <p>By: _____ Signature</p>	<p>By: _____ Richard Jackson _____ Signature</p>	<p>DocuSigned by: <i>Samantha Talyor</i> 0474082253284D6...</p> <p>By: _____ Signature</p>
<p>or and on behalf of Methods Laurence Wells Account Director</p>	<p>For and on behalf of [Defra Group Property ] [Richard Jackson] [Deputy Director   Head of Estates and FM Strategy ]</p>	<p>Defra Group Commercial Insert name Samantha Talyor Insert role Senior Category Officer</p>
<p>[Insert date] 07-01-2022   15:35 GMT</p>	<p>06/01/22</p>	<p>[Insert date] 07-01-2022   15:41 GMT</p>
<p>Supplier engages with Business Area to complete. Once agreed, Supplier signs front page and sends to Business Area</p>	<p>Business Area signs front page and sends to DgC</p>	<p>On approval, DgC signs and returns copy to Business Area and Supplier</p>

Supplier contact: \_\_\_\_\_

Business Area contact: \_\_\_\_\_



## 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.

## 1. Background

The WP&FM24 project is a transformation and re-procurement project for the DgP workplace and FM services that manage 300+ properties including the Weybridge campus

This specific requirement is for technical consultancy capability to mature the ICT roadmap and, by inference, the Target Operating Model that aligns and supports the delivery of the WP&FM24 project.

The WP&FM24 project plans to go to market for specialised suppliers in early 2022 (February/March) and for the core facilities management suppliers in mid-2022 (June). To enable an effective and commercially compliant procurement DgP requires enhancements to its Target Operating Model (TOM).

The TOM enables:

- accurate requirements definition within the tender process and subsequent bid assessment.
- engagement with the Trade Unions, ALB's and internal stakeholders

To date the project has developed a TOM framework and set of design principles. The project also has defined owners for the development of each element of the TOM. The project has a digital roadmap which requires its next stage of development and implementation, further informing the TOM. This short piece of work ensures:

- the project meets a critical path milestone 'Tender ready for issue in March 2022'
- enables recruitment of specific resource to lead the digital workstream from March 2022
- aligns to the planned start of a change management role from April 2022 support the development of the Procurement strategy, specification and ensure adherence to DDTS and the project requirements.

If this work is not completed DgP will not be able to specify the ICT services and standards it requires of the supply partners which will lead to all or some of the following - no service provision/over specified costly provision/non-compliant ICT systems being used. The Weybridge SCAH programme has a key dependency on the WP&FM24 project delivering a new TOM that will ensure service delivery outcomes for the estate (new and retained buildings). This dependency cannot be met without the ICT roadmap & subsequent delivery

## 2. Statement of services



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## Objectives and outcomes to be achieved

The consultancy support team will lead on the development of the WP&FM24 Target Operating Model (TOM) Playbook which describes all services, to approx. 80% completeness for each service. The support team will also be responsible for provision of support to the Digital Workstream (detail of support set out in 'Scope').

The skills required for this delivery are technical specialist skills in target operating model design and execution, organisational design expertise and complex multi-project initiation and development. These skills are not currently available internally therefore the delivery partner consultancy team will be contracted to carry out detailed and robust knowledge transfer (KT) to the internal programme team and where appropriate, wider stakeholders.

Knowledge transfer is part of our delivery partner's core offer and they have a KT framework to identify plan and assure this. Moreover, they are contractually incentivised to achieve specific KT outcomes that will be tracked through monthly reporting and evaluated through review of completed KT logs and reports, including sign off from individual knowledge recipients.

## Scope

Support for the **Operations Workstream** to facilitate the development of the TOM shall include:

Contributing to a 'TOM Playbook'.

Consultancy support will include process mapping for the WP&FM services:

- Prioritising core and dependent services to support the Specialist Service Providers procurement activity
- Completion of other process maps as time allows.

Additional support shall include the development of the Defra Service Matrices and support for the development of a TOM Implementation Plan.

Support for the **Digital Workstream** shall include:

- Development of the DgP digital strategy.
- Development of WP&FM digital requirements.
- Establishment of Defra information security requirements in conjunction with CCS & HMG standards.
- Contract schedule drafts relating to the Digital workstream.
- Lead market engagement with respect to systems/CAFM

## Assumptions and dependencies

There is a dependency on commercial timelines to approve and commence work by 4th January 2022 in order to achieve the proposed end date (no later than March 25th, 2022).

## Risk management

There is a risk that the business will not sign up to the required business change thereby impacting the benefits of the delivery.



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There is a risk that commercial timelines prevent timely commencement of the consultancy support placing the proposed end date at risk.

## Deliverables

Deliverables will include:

- A Digital Strategy as described above.
- WP&FM Service Process Maps as defined in the 'Scope' section above.

The table below sets out defined deliverables, success criteria, dates and ownership:

Deliverable	Success Criteria	Milestone / Date	Owner (who in the delivery team?)
<b>Operations Workstream</b>			
Process maps for WP&FM Services	Effectively prioritised core and dependent services (approx. 15-20 to be identified) to support the Specialist Service Providers procurement activity.  Clear, unambiguous process maps adhering to industry best practice mapping and aligned with the TOM.	First Draft 31/1/22 Second Draft 28/02/22 Final 25/03/22	Business Analyst / ICT Lead
Service and Roles and Responsibilities Matrix	Clear definition of services provided to each site with roles and responsibilities defined, ensuring alignment with wider Operations Workstream deliverables.  Format and content will be determined by the Operations Workstream.	First Draft 31/1/22 Second Draft 28/02/22 Final 25/03/22	Business Analyst / ICT Lead
<b>Digital Workstream</b>			
DgP digital strategy	Definition of what the 'day 1' digital model looks like.  Appropriately approved and governed position is secured for the digital strategy and first phase digital model.	09/02/22	ICT Lead



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Deliverable	Success Criteria	Milestone / Date	Owner (who in the delivery team?)
WP&FM digital requirements.	Draft contractual schedules clearly describing Defra's digital requirements, aligned with the DgP Digital Strategy, to support Defra's procurement draft schedule.	First Draft 28/02/22 Final 25/03/2022	ICT Lead
Market engagement report: systems/CAFM	A report summarising the findings from the market engagement activity with respect to the provision of digital solutions to support the delivery of FM services.	28/01/2022	ICT Lead
<b>Internal Capability Development Outcomes</b>			
Knowledge transfer to internal team carried to agreed standards as set out in work packages in KT framework	KT signed off by internal recipient by work package and approved by monthly meeting of programme leadership	25/03/22	ICT Lead

### 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.

Role (link to stage/s resource will work on)	Grade	Daily rate	# of days	Cost
██████████	██████████	████	██	██████████
██████████████████	██████████ ██████████	████	██	██████████
██████████████████	██████████	████	██	██████████
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			██	██████████



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<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>118/56=2.1</b>
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#### Business Area's team

The DgP WP&FM24 Team will be the point of engagement for the Methods team. The Programme Director will lead this engagement and introduce the wider project team as required

#### 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 £95,402, inclusive of expenses and excluding VAT.

Provide costs for any particular stages to the engagement.

Stage	Cost	Due (link to milestone dates)
Stage		DD/MM/YY
Operations Workstream	██████	25/03/022
Digital Workstream	██████	25/03/022
<b>Expenses</b>		
<b>Grand total</b>	£95,402	31/03/022

#### Business Area considerations:

- rates discounted representing a saving of ██████ against framework rates

#### 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

Business Area to outline governance and report requirements.



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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.
- At least weekly formal progress reporting and future activity planning
- Reporting of progress to the WP&FM24 PMO
- Attendance at WP&FM24 Operations Board (1 per month) and on request to Project Board

### Key Performance Indicators

Overarching framework KPI's will stand as applicable.

Business Area and Supplier to agree any specific key performance indicators related to this specific project engagement. To be developed with Methods within the first 2 weeks of starting the project

KPI	KPI Requirement	Description	Reporting Frequency	Who Measures	Method of Measurement	Performance Target

### 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 of the engagement will be arranged where the Business Area rates the services provided.

### Non-disclosure agreements

The overarching MCF2 framework include NDAs. Insert any additional NDA requirements her

## 6. Exit management

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

Process maps for WP&FM Services Service and Roles and Responsibilities Matrix DgP digital strategy - Appropriately approved and governed position is secured for the digital strategy and first phase digital model WP&FM digital requirements - Draft contractual schedules Market engagement report: systems/CAFM Knowledge transfer to internal team carried to agreed standards as set out in work packages in KT framework
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### Notice period



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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:  
[REDACTED]
3. The form is reviewed by the DgC team around which resource route is most appropriate (e.g. Lots 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>

