








## Defra Group Management Consultancy Framework: Project Engagement Letter

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

Engagement details			
Engagement ref #	DPEL_61541_018		
Extension?	N	DPEL Ref.	N/A
Business Area	Portfolio Directorate		
Programme / Project	EPMO Transition and Support		
Senior Responsible Officer	[REDACTED]		
Supplier	Methods Consulting Ltd		
Title	EPMO Transition and Support		
Short description	<ol style="list-style-type: none"> <li>1) A training service and supporting processes to support onboarding of 2 (minimum) to 4 (maximum) programmes onto the EPMO system by the 31/03/2022</li> <li>2) A training service and supporting processes to build the capability of Portfolio Directorate to enable the Directorate from 1 April 2022 to onboard and support Defra major programmes to the EPMO system</li> <li>3) A repeatable transition processes for further programmes to follow.</li> </ol>		
Engagement start / end date	Proposed start date 17/01/2021	Proposed end date 31/03/2022	
Funding source	Current in year funding		
Expected costs 21/22	£91,795		
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 #	V0.4 <i>Start at 0.1, 1.0 when approved, increment from 1.0 for Change requests</i>		

**Approval of Project Engagement Letter**

By signing and returning this cover note, the Portfolio Directorate 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
		
or and on behalf of Methods Digital and Business Technology  Head of Change Delivery	For and on behalf of Portfolio Directorate  	Defra Group Commercial  Senior Category Officer
17-01-2022	17-01-2022	17-01-2022
Supplier engages with Business Area to complete. Once agreed, Supplier signs front page and sends to Business Area	Business Area signs front page and sends to DgC	On approval, DgC signs and returns copy to Business Area and Supplier

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 Portfolio Directorate requires external consultancy support to transition two (minimum) to four (maximum) Defra major programmes onto the EPMO system and to build Portfolio Directorate capability in the operation of the EPMO tool by 31st March 2022.

We will enable the onboarding to happen through the training of key individuals, using a train the trainer approach, and the implementation of repeatable supporting processes to allow the future autonomy of Portfolio Directorate to conduct onboarding process and undertake services to support major programmes using EPMO.

In summary the requirement is to:

1. Provide transition support through the training provision for identified Portfolio Directorate and major programmes stakeholders, deploying a tailored train the trainer approach. Training provision will establish the capability to fully onboard required members of recipients' programme team(s).
2. Upskill Portfolio Directorate staff, building a capability in Portfolio Directorate to onboard and support major programmes on the EPMO system. This will include establishing a repeatable onboarding process, enabling the Portfolio Directorate to continue the onboarding process and support to programmes on the EPMO platform beyond the lifetime of this engagement.
3. Provide ac hoc support to Portfolio and programme staff onboarding colleagues and teams onto the EPMO system (during the lifetime of the engagement).

This activity is outside the current business as usual activities of the Portfolio Directorate.

## 2. Statement of services

### Objectives and outcomes to be achieved

The primary objective of the consultancy support arrangement is to enable the transition of two (minimum) to four (maximum) programmes onto the EPMO system (constituted of Microsoft Projects Online and PowerBI) by the 31<sup>st</sup> March 2022 by upskilling the Portfolio Directorate and developing materials for individuals who will take on responsibility for onboarding programme teams during and after the period of this engagement.

The second objective of the consultancy support arrangement is to ensure that the Portfolio Directorate is positioned to effectively to take forward transition of further programmes onto the



EPMO system beyond the lifetime of this engagement, and to support those programmes in ongoing use of EP MO.

The outcomes to be achieved are as follows:

- Upskilled Portfolio Directorate staff through to enable them to operate the EP MO system as per their role (including but not limited to risk, governance, planning, reporting, portfolio management), utilizing in-house capacity and building in-house capability to enable the provision of ongoing support to programmes.
  - Successful training provision will consider previous and existing training and engagement feedback, processes and tools developed and/or utilised by the Corporate Services owners of the EP MO system –gathered by the EP MO team to ensure delivery effectiveness, including but not limited to pacing, engagement techniques, Q&As, real time-practice etc.
- Defined knowledge transfer and a repeatable onboarding process for programmes.

## Scope

The delivery scope of the consultancy support arrangement is to:

- Undertake familiarisation training on the system
- Review existing training material and adapt as necessary for onboarding approach
- Produce user guides and documentation for the ongoing support of the portfolio staff using the systems.
- Provide hands-on approach to training focusing on real work as opposed to theoretical models, considering historic training and engagement feedback as well as existing practice developed in the Corporate Services team.
- Provision of ongoing support throughout the engagement which reduces over time as users become more skilled with the system and processes.
- Provision of advice and guidance on the optimisation of the platform, processes, protocols, and outputs.
- Provision of a transition approach that enables Portfolio Directorate to onboard further portfolios, programmes and projects to EP MO.

An inception phase will be followed by a three-stage transition support model phase (Show, Share, Support):

### Inception phase

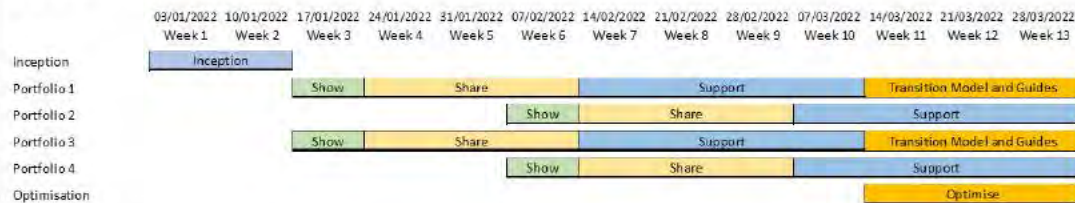
The Inception phase is the first phase of the work and will have the following outputs and activities

- Agreeing the Project Initiation Document which will contain the agreed programmes to be onboarded and a project plan to support this.
- The Methods team developing an understanding of the EP MO model and how it has been implemented onto Microsoft Project Online and Power BI.
- Production of training materials for the “Show” phase of the transition, based on pre-existing material.
- Collect baseline information regarding the portfolios/programmes/projects to be transitioned onto EP MO, such as SRO commentary, plans, RAID logs, milestones and other related information.
- Collect information regarding the formation of the portfolio teams to be transitioned.
- Book sessions for each of the portfolios in advance of their engagement.
- Agree mechanisms for Change Management, Administrative activities (user accounts, permissions and licencing).
- Early engagement with relevant stakeholders from each portfolio/programme/project to let them know what is coming and the impact of the engagement.

- Produce and agree communications.

### Transition support model phase

Please note the timeline below is indicative only and likely to change during the engagement.



- **Show**  
During this stage the Methods resource will work with the portfolio team to get a standard baseline of skills and capabilities in using the system against their current work.
- **Share**  
During this stage, the team work collaboratively, splitting out the tasks with the internal team progressively taking on greater responsibility for the use of the system.
- **Support**  
During the final stage the portfolio team will work independently with the system and process but will have access to support on demand from the Methods resources.

### Optimise phase

In the final weeks a Methods team member will synthesise what has been learned and provide pragmatic and actionable recommendations to the Portfolio Directorate team on potential to optimise onboarding and support processes, as well as the EPMS system itself.

### Out of Scope

The ownership of the buy-in to get programmes to be onboarded (as distinct from the onboarding process, including 'handshake agreement', which is IN scope), provision of suitable instances, system configuration, system administration and end-user technical support are all out of scope. Ensuring availability of suitable staff to receive training is the responsibility of the individual programmes supported.

### Assumptions and dependencies

- Defra will provide access to relevant key personnel (subject matter experts for in scope programmes).
  - During the week of initiation Defra and Methods will agree the stakeholders required for engagement and introductory sessions will be arranged.
- Methods will have access to all available relevant Defra documentation, information, and access to all in-scope subscription environments.
- Defra will provide training to the Methods team on the system, give access to all pre-existing training materials and permission to adapt as necessary for the onboarding approach.
- Methods will have access to lessons learned as part of historic training delivery to ensure training is designed and executed in the most appropriate way for the audience.
- All Methods work will be undertaken remotely including the provision of training.
- Programmes being onboarded will already be prepared to do so in terms of senior support and available resources.
- Suitable ePMO instances will be available for all programmes being onboarded



## Risk management



## Deliverables

All deliverables are set out in the table below:

Deliverable	Success Criteria	Milestone / Date	Owner (who in the delivery team?)
<b>Inception phase</b>			
<b>Project PID / Plan</b>	Contains objectives, stakeholders, product descriptions, governance, and schedule. Sponsor / SRO sign off	14/01/22	Delivery Manager
<b>Onboarding requirements definition</b>	Clearly articulated definition of the success criteria for onboarding programmes onto the EPMO system.	21/01/22	Delivery Manager
<b>Training materials</b>	Initial approved training content aligned with core component areas of the EPMO system. Based upon existing content and applying lessons learned and tailoring materials for different audiences.	26/01/22	Training Consultant(s)
<b>Transition support model phase (Show, Share, Support)</b>			
<b>Weekly onboarding progress reports</b>	Clear reporting defining progress, stakeholders engaged, knowledge transfer progress, risk, issues and feedback on the efficacy of	Weekly from 28/01/22	Delivery Manager

Deliverable	Success Criteria	Milestone / Date	Owner (who in the delivery team?)
	different training approaches deployed and planned. Including a backlog of change requests arising from our onboarding engagement.		
<b>Optimise phase</b>			
<b>Repeatable process</b>	Clearly defined and actionable onboarding (to the point of successful programme adoption) process for further programmes.	25/03/22	Consultant
<b>Updated training materials</b>	Updated content based on learning from onboarding process	29/03/22	Training Consultant(s)
<b>Recommendations</b>	Opportunities for optimisation. Recommendations on increasing adoption, strategy for roll-out and maturing sustainably over time.	31/03/22	Consultant
<b>Internal Capability Development Outcomes</b>			
<b>Knowledge Transfer Log</b>	Planned knowledge transfer activity recorded and evidenced as complete. Including a baseline of skills and capabilities in using the system (per prog).	Developed and maintained from inception. Delivered as complete 31/03/22	Delivery Manager
<b>Social Value Outcomes</b>			

### Limitations on scope and change control

Business Area / 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 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
Delivery Manager	Senior Consultant/ SEO	████	████	████
Training Consultant (SSS)	Senior Consultant/ SEO	████	█	████
Training Consultant (SSS)	Senior Consultant/ SEO	████	█	████
Consultant	Principal Consultant G7	████	█	████
Delivery Assurance	Managing Consultant G6	████	█	████
<b>Total</b>				<b>£91,795</b>

<b>Total resource</b> $\frac{\text{Total days}^*}{\text{Engagement Length}^{**}}$	139.5 / 65 = 2.146
<small>*Total days worked across all resources  **Total working days in engagement</small>	

#### Business Area's team

#### 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 £91,795, inclusive of expenses and excluding VAT.

Provide costs for any particular stages to the engagement.

Phase	Cost	Due (link to milestone dates)
<b>Milestone 1</b>		<b>DD/MM/YY</b>
Mid-Point Review	████	18/02/2022



Phase	Cost	Due (link to milestone dates)
<b>Milestone 2</b>		
End of Assignment	████████	28/03/2022
<b>Grand total</b>	<b>£91,795</b>	

### 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.

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;
- Weekly Project Report

### 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	Learning objective sign-off	Confirmation of selected staff achievement of learning objectives	Fortnightly	Methods / Defra	Knowledge transfer log	100% confirmation of those who have completed learning

### 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 here.

## 6. Exit management

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

At completion of the ELS aspect of support, and once all ELS exit criteria have been met a final project completion report will be produced and circulated to the SRO, Sponsor and Steering group as appropriate.  
The key outcomes of the project will then be presented back to the client and formal acceptance of closure agreed.

### Notice period

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:  
[consultancy2@defra.gov.uk](mailto:consultancy2@defra.gov.uk)
3. The form is reviewed by the DgC team around which resource route is most appropriate (e.g. Lots 1/2/3) 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>

