

Defra Group Management Consultancy Framework: Project Engagement Letter

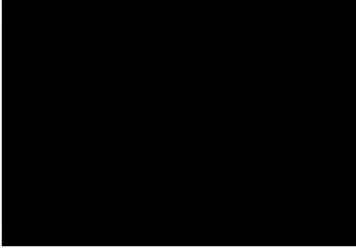
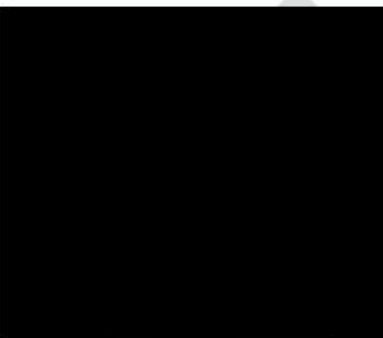
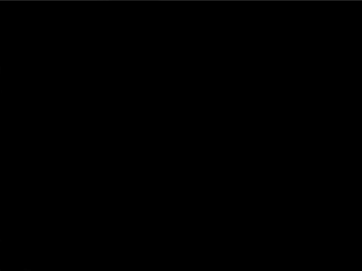




Completed forms and any queries should be directed to Defra Group Commercial at


Engagement details			
Engagement ref #	DPEL_61547_003		
Extension?	N	DPEL Ref.	N/A
Business Area	Rural Payments Agency ("RPA")		
Programme / Project	Customer Services Transformation		
Senior Responsible Officer	SRO – [REDACTED] Business Lead – [REDACTED]		
Supplier	Deloitte LLP		
Title	Customer Service Excellence Transformation		
Short description	<p>RPA has embarked on a strategic portfolio of work to transform and achieve customer service excellence. This has been agreed with ministers as a strategic priority for the Agency and is a vital component of RPA's five-year strategy. The work has been scoped based on significant insight and feedback from customers, industry partners and other key stakeholders, such as MPs.</p> <p>The portfolio of work has been established but requires crucial external leadership and delivery support with a strong track record in delivering customer service transformation to bring capability with in-depth knowledge and experience drawn from exemplars across government and wider industry. This external perspective and support during the first 4 months will ensure it is scoped and established properly, the roadmap is clear, to share knowledge to address a current gap and to bring vital momentum to the portfolio of activities.</p>		
Engagement start / end date	01/09/2021	31/12/2021	
Funding source	RPA RDEL budget envelope		
Expected costs 21/22	£368k		
Expected costs 22/23	N/A		
Expected costs 23/24	N/A		
Dept. PO reference			
Lot #	Lot 2		
Version #	1.0		







Approval of Project Engagement Letter

By signing and returning this cover note, the Rural Payments Agency accepts the contents of this Project Engagement Letter as being the services required and agrees for Deloitte to provide the services in accordance with the agreed Supplier Proposal under the overarching contract (Lot 2 - Ref 28595), with Defra Group and confirms the availability of funding to support recharge for the services.

Signatures		
Supplier	Business Area	Defra Group Commercial
		
For and on behalf of Deloitte LLP  Partner	For and on behalf of [Rural Payments Agency]  Director – Organisational Capability	Defra Group Commercial  
10.09.2021	10.09.2021	10.09.2021
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: , Partner; 
 Director; 

Business Area contact: , Director – Organisational Capability 
 Head of Service Development and Innovation; 



General Instructions

The Project Engagement Letter describes the Services. When completing the Project Engagement Letter establish the context, explain why external support is required and distinguish between the objectives, outcomes, scope and deliverables. The rationale behind the fees should be made evident in the Fees section.

The Business Area considerations are guidance notes for the customer to support their evaluation of the Project Engagement Letter.

1. Background

This transformation work is vital enabler in the pursuit of helping agricultural and rural communities to create a better place to live. It is a cross cutting requirement that will support

- the delivery of environmental outcomes through high quality service provision;
- the successful delivery of agricultural transition; and becoming an exemplar for the Civil Service's Operational Delivery practice

The external capability will comprise a small team from a management consultancy capability to inject expertise and momentum to help shape, plan and support the delivery to set it off on the road to success.

2. Statement of services

Objectives and outcomes to be achieved

The Supplier personnel will be asked to undertake the assignment to:

- Work directly with the SRO and the lead delivery team to understand the ambition and to provide advice on the current thinking, scope and approach (including whether organisational structures are fit for purpose to deliver customer excellence)
- Bring external perspective, benchmarking and experience of exemplar customer service transformations
- Work as part of a multi-disciplinary team across RPA, sharing and transferring knowledge, experience and best practice
- After a short period of consolidation, re-confirm the scope and translate into a plan and roadmap. Providing a portfolio management wrapper and oversight
- Delivering and supporting the initiation of transformation activities to be defined in the diagnostic stage and driving momentum and delivery.
- The Customer is responsible for determining that the scope of the Services is appropriate for its needs.
- The Services are provided solely for the benefit of the Customer and the Business Area.

Scope

Define the scope of the services (*SMART*):



The Services will be performed virtually via MS Teams and in person as/when required for the work

Assumptions and dependencies

This Project Engagement Letter is based on the following assumptions and dependencies:

- There will be dependencies across the business, including interdependencies between work and delivery areas and processes across the agency
- This transformation has to be delivered whilst business as usual rural payment cycles continue and that business is not disrupted whilst being transformed.

In accordance with clause 10.13 of the Call Off Contract, the Customer provides its approval for the Supplier to take information offsite and work offsite.

The Customer or Business Area will notify the Supplier prior to the commencement of the Services of any internal policies, security policies, ICT policies, or other policies, codes or procedures that it requires the Supplier to comply with (and where applicable update the Supplier to the changes in any such policies).

The Customer and/or Business Area will not supply the Supplier with any Personal Data unless otherwise agreed in writing between the Parties.

Supplier is not responsible for Delays that are outside of its reasonable control.

Any and all enhancements and/or modifications to the Supplier's background IPR will be retained as Supplier Background IPR.

In line with good industry practice, the Supplier's Services will be performed for the sole benefit of the Customer and the Business Area and should only be used for the purpose described in the Project Engagement Letter. Except as otherwise expressly agreed, no one other than the Customer and/or the Business Area may rely on the Deliverables and/or information derived from them and the Supplier accepts no responsibility to anyone else to whom the Deliverables are shown or into whose hands they may come.



Any information relating to:

- Personal information (CV's, contact details etc.)
- Pricing and details of Supplier's cost base
- Insurance arrangements
- Proprietary information and/or
- Approach and/or methodologies

is commercially sensitive/confidential and exempt from disclosure under the Freedom of Information Act 2000 ("FOIA"). If a request to disclose such information is received, the Parties will work together and consider the applicability of any FOIA exemptions.

Deliverables

During the course of the Project Engagement, the Supplier expects to produce the deliverables outlined in the below table, all of which are focused on Deloitte capability to:

- Bring and be able to intelligently apply benchmarking data and insight
- Bring a methodology specifically relevant to customer service transformation that will complement the thinking that has already been done
- Portfolio management to bring activities together in a meaningful sequence and set of plans and overarching road map
- Customer service transformation experience to start driving momentum and to share knowledge and experience with a multi-disciplinary team from RPA.

Success will be evaluated through delivery of defined deliverables and activities, and agreed KPIs, feedback from SRO, completion of the agreed knowledge transfer plan and the agreed portfolio of activities defined to support in the on-going delivery phase, which will start in this supplier contract.

The Deliverables will be prepared by a combination of Supplier Personnel working jointly with Customer and/or the Business Area personnel and the Customer and/or the Business Area will remain solely responsible for all of the decisions, assessments, conclusions and judgments underlying them and they will not be Supplier branded.

Deliverable	Success Criteria	Estimated Milestone / Date	Owner (who in the delivery team?)
Project Stage A			
Diagnostic: <ul style="list-style-type: none"> • 1-page baseline summary and high-level plan for each initiative • Current governance structure and high-level systems overview and recommendations • Diagnostic report, including current observations, culture and change, and programme delivery 	Documented baseline of current initiatives and portfolio structure, risks, culture and change considerations, and suggested next steps for delivery.	30/09/2021	



Deliverable	Success Criteria	Estimated Milestone / Date	Owner (who in the delivery team?)
focus (such as recommendation for how to intelligently apply benchmarking data and insight). The report will align with methodology specifically relevant to customer service transformation that will complement the thinking that has already been done			
Baseline Transformation plan and implementation roadmap (including portfolio management to bring activities together into a meaningful sequence and set of plans, to include individual area plans, and overarching roadmap)	Overarching transformation plan and roadmap for success, and associated plans, devised and approved by SRO and delivery team with implementation started.	08/10/2021 for initial transformation plan and roadmap	[REDACTED]
Knowledge transfer plan	Knowledge transfer plan devised, approved by SRO and delivery team and implementation started	08/10/2021	[REDACTED]
Project Stage B (additional stages can be added)			
Programme Delivery (including bringing programme and customer services transformation experience to start driving momentum and to share knowledge and experience with a multi-disciplinary team from RPA): <ul style="list-style-type: none"> Updated Transformation Plan and Roadmap Final documented Programme delivery approach and toolkit Final report (including next steps) 	Updated transformation plan and roadmap, documented programme delivery approach and toolkit, and final report devised and approved by SRO and delivery team.	17/12/2021	[REDACTED]
Internal Capability Development Outcomes			
Knowledge transfer workshop/s and handouts	All agreed RPA people involved in the transformation programme to have acquired knowledge transfer from the consultant team to provide their learning further across the Agency.	Throughout the contract, to be identified on the overarching transformation plan and	[REDACTED]

Deliverable	Success Criteria	Estimated Milestone / Date	Owner (who in the delivery team?)
		associated plans. 31.12.2021	
Social Value Outcomes			
[To be agreed with Defra Group]			

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 set out in the Call Off Contract. Any changes to timescales, scope and costs will require approval by DgC.

The Supplier assumes that the project timeline is indicative only and will be subject to change. Any timetable will be dependent on the Parties fulfilling their respective responsibilities.

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
	Engagement Partner	Partner			
	Engagement Director	Director			
	Org Structure and Delivery Lead	Managing Consultant			
	Roadmap and Delivery	Principal Consultant			
	Culture and Change	Senior Consultant			
	Delivery Support	Consultant			
	SME	Director			

Total resource	Total days* Engagement Length**	
*Total days worked across all resources **Total working days in engagement		

Business Area's team

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

The Customer and/or the Business Area will remain solely responsible for managing all aspects of its business and applying its independent business judgement to evaluate any advice or recommendations that the Supplier provides it. The Customer will be responsible for deciding whether the Supplier's recommendations make sense in the context of its business and whether it wishes to rely on, implement or act on them, including the actions necessary to realise any expected benefits.

4. Fees

Defra Group will reimburse the Supplier on a time-incurred basis for approved work done according to the table below. The total fees for the scope of work detailed in this Project Engagement Letter will be £367,851, inclusive of expenses and excluding VAT.

In accordance with clause 7.2 of the Call Off Contract, the Supplier's total aggregate liability in relation to any Defaults occurring under this Project Engagement Letter to the Customer and the Business Area is the sum equal to one hundred and twenty-five per cent (125%) of the total value of the estimated fees, being £367,851 which shall be apportioned between the Customer and the Business Area.

Stage	Estimated Cost	Due (link to milestone dates)
A		DD/MM/YY
<ul style="list-style-type: none"> Diagnostic: <ul style="list-style-type: none"> 1-page baseline summary and high-level plan for each initiative Current governance structure and high-level systems overview and recommendations Diagnostic report Baseline Transformation plan and implementation roadmap Knowledge transfer plan 		08/10/21
B		
<ul style="list-style-type: none"> Updated Transformation Plan and Roadmap Final documented Programme delivery approach and toolkit Final report (including next steps) Knowledge transfer workshop/s and handouts 		17/12/21
Expenses		
N/A at this stage	£nil	
Grand total	£367,851	

Business Area considerations:

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

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

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 weekly basis, to track days worked by our consultants;
- Weekly progress updates against the agreed activities and deliverables;
- Other business area reporting requirements as agreed.

Key Performance Indicators

See above

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

Feedback and satisfaction

Business Area and Supplier to agree regular and weekly 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 includes Confidentiality terms which apply.

6. Exit management



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

See Deliverables above

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:
[REDACTED]
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"> ▪ DPEL agreed ▪ DPEL signed: Supplier, Dept and CO ▪ Purchase Order number 	<ul style="list-style-type: none"> ▪ Work can start ▪ Supplier can invoice for work

