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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

Engagement details				
Engagement ref #	DPEL_61541_062			
Extension?	N		**DPEL Ref.**	Previous DPEL reference number
Business Area	Portfolio Directorate			
Programme / Project	Delivery Data Enhancements			
Senior Responsible Officer	████████			
Supplier	Methods Consulting Ltd			
Title	Power Platform Capability			
Short description	To both move towards a more data-centered approach to reporting, and to improve Project Portal's user experience and functions, both the Project Portal and Portfolio Reporting teams require 1. New PowerBI Dashboard packs (2) 2. PowerApps solution to replace current reporting setup A successful outcome of the project will result in 1. Capability in Project Portal team and GCS to build PBI dashboard packs themselves 2. Capability in Project Portal team to build PowerApps			
Engagement start / end date	Proposed start date 28/11/2022		Proposed end date 24/02/2023	
Funding source	Current in year funding			
Expected costs 22/23	£93,999			
Expected costs 23/24	£NA			
Dept. PO reference	Dept. PO reference # (to allow for Defra Group recharge)			
Lot #	Lot 3			
Version #	V1.0			

Approval of Project Engagement Letter

> By signing and returning this cover note, 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.

25-11-2022 |	6:25 GMT 28-11-2022 | 12:42 MT	28-11-2022 | 12:43 GMT
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

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

> Briefly justify why support is required:
>
> In June 2022, Portfolio Directorate (PD) took ownership of the Project Online instance previously known as EPMO. PD rebranded the platform and associated service offering 'Project Portal' and since June has been working to:
>
> A) Provide improved and user-centered management and administration of the platform
> B) Onboard 100+ projects from Defra Digital and Technology Service (DDTS)
> C) Onboard major projects that are part of the Defra Major Project Portfolio
> D) Improve user experiences and platform functionality by investing in technological improvement (i.e. ReportALL)
>
> At the same time, a sister team to the Project Portal team - the Portfolio Reporting team - has been managing a monthly cycle of commissioning, producing and disseminating data on major project delivery. The resulting output, the Portfolio Performance Report (PPR) is used by Defra's senior leaders to inform discussion and decisions on major project delivery, and is a cornerstone of the Perm Sec and DG-level monthly 'Delivery Committee' agenda.
>
> To both move towards a more data-centered approach to reporting, and to improve Project Portal's user experience and functions, both the Project Portal and Portfolio Reporting teams require capabilities to:
>
> 1) Build PowerBI dashboards from the Project Portal data model
> 2) Build PowerApps based solutions to move to a data-centered approach to reporting and major project management

2. Statement of services

Objectives and outcomes to be achieved

> State and describe the aims of the engagement:
>
> At output level, this engagement will deliver:
>
> Output 1 – portfolio board-level PowerBI dashboards for the new Defra Group Corporate Services Transformation Portfolio
> Output 2 – generic dashboards – otherwise known as a 'base pack' of dashboards – to be made available to major projects using Project Portal
> Output 3 – a PowerApps-based solution to replace the current Portfolio Reporting process, tools and outputs

> Output 4 – As Is and To be data structure/architecture
>
> As well as the above, the outcomes for this consultancy will include building capability in the Project Portal and Portfolio Reporting teams to
> 1) build and maintain PowerBI dashboards from the Project Portal data model and 2) build and maintain PowerApps solutions to data collection, storage and representation requirements

Scope

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

In Scope

Output 1

Assessment of the Transformation Board pack process and data requirements

Capability development opportunities in core team to embed skills and knowledge

Development of GCS Transformation Portfolio Power BI report

Output 2

Assessment of requirements for Project Portal base pack

Development of a core data model and published data set

Development of a Base pack/MVP exemplar Power BI Report

Capability development opportunities in core team to embed skills and knowledge

Knowledge transfer to at least to 6 named Defra staff to enable Defra to maintain the Power BI reports and create new ones in future

Output 3

Analysis of the user and technical requirements for the Excel to PowerApps transition

Assessment of the nature of the data to be used in the app. (If sensitive/personal it will required DDTS Security Assurance.)

Development of a data model and structures to store data currently mastered in Excel

Development of an end user interface over the data model

Development of process and training to enable PP Helpdesk to maintain the PowerApp (key stipulation from DDTS)

Knowledge transfer of PA architecture/build to allow internal maintenance and management. Capability development opportunities in core team to embed skills and knowledge Produce a PA build document outlining the PA code/build for reference when changes are required.

Output 4

A documented As Is data structure/architecture (at engagement end)

A proposed To Be structure/architecture and route map suggesting how transition to the future state.

Out of Scope

Development of the wider concept of the Project Portal "Datalake". This is an ongoing activity within the Project Portal, related but not dependent.

Development of an adjunct training offering in the Power Platform tailored to the Project Portal Context

Assumptions and dependencies

- ☐ The Draft Stage 1 Project Plan is at a mature and feasible level that only minor changes are required over the 2 week review period.

- ☐ "Reportall" product is in place by 01/012023 to allow sufficient time to incorporate custom field types into the new Data Model

- ☐ Appropriate access and permissions are established for project team in the first month after kick off

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- ☐ Defra team members take responsibility for the identification of the high-level requirements for assessment by the Methods consultants prior to any development of data structures, apps or reports

- ☐ A suitable Power Platform Environment (Sandbox) is available for the development and testing of Power Platform components

- ☐ Connections and permissions of the tools are based on Service Accounts rather than on individual team members

- ☐ Project Portal team members have sufficient capacity for Knowledge Transfer and Capability building

Risk management

Provide further details of any foreseen risks with this project and how they could be mitigated:

There is a risk that detailed requirements for the GCS Transformation Portfolio report will change over time due to it being a new portfolio reporting into emerging governance. This could be mitigated by taking an agile approach to development and building it in small chunks; knowledge transfer will ensure that GCS PMO can deal with any requests for changes that are received following completion of this engagement

Risks will be managed through two related processes:
1) The regular fortnightly cycle of risk management discussion at Project Portal programme level
2) Ad hoc discussions about risks related to this project specifically that can be convened at any time by Methods, the Project Portal, Portfolio Reporting or Group Corporate Services teams

Deliverables

Deliverable	Success Criteria	Milestone / Date	Owner (who in the delivery team?)
Project Initiation			

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Service Definition Document (SDD)	Working document developed and agreed between the Business Area and Methods once initial data and stakeholder mapping is complete, detailing product descriptions with quality criteria, plan, and project governance. This is subject to regular review through checkpoint meetings as part of ensuring delivery progress is in line with agreed DPEL requirements and outcomes. Also contains service description for client communication to wider stakeholders. Added as an Annex to the signed DPEL	02/12/2022 Mid Point	Delivery Manager
Project delivery plan	Plan covers process of business integration, has a clearly set out plan with appropriate milestones and time risk allowance, training plans, testing and commissioning arrangements and sets out project management methods and controls. Plan accepted by the Portfolio Directorate Plan incorporates the inputs from all parties	02/12/2022 Mid Point	Delivery Manager
Output 1			
GCS Transformation Board Pack Data Model	A data model that supports the data required for the pack including data structures to store this data	13/01/2023 Mid Point	Data Architect

Deliverable	**Success Criteria**	**Milestone / Date**	**Owner** (who in the delivery team?)

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GCS Transformation Board Pack in Power BI	A Power BI report that takes data from selected projects and programmes from Project Online and collates it with data for a set of initiatives not on Project Online (data provided by these projects on a set template). Presentation to include text, numbers, graphs, tables, colourcoding, etc., based on existing PowerPoint exemplar. The Power BI reports conform to Defra Standards of format and presentation as provided.	27/01/2023 Project End	Power BI Designer
Output 2			
Common Data Set solution incorporating a Data model	Common Data set incorporates all the inscope data sources Data set conforms to house Defra standards as provided	13/01/2023 Mid Point	Data Architect
Base pack/MVP exemplar Power BI Report	The Base pack is able to illustrate the scope of the Common Dataset to report	27/01/2023 Project End	Power BI Specialist
Output 3			
Data Model with PowerApps Interface	The process and tools for capturing data results in higher quality data capture with minimum reprocessing Defra staff collaborate in the creation of the PowerApp and are able to take responsibility for its maintenance.	13/01/2023 Mid Point	Data Architect
A solution incorporating a Data model with a Power Apps interface providing user functionality to	The effort taken to produce the report is reduced	10/02/2023 Project End	Power Apps Specialist

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Deliverable	Success Criteria	Milestone / Date	Owner (who in the delivery team?)
maintain the data with Automation to ensure consistent results.	The Power app conforms to Defra standards as provided		
Data model feeds into a Power BI Report. Solution replaces a series of Excel files that are currently used to capture report data that is manually inserted in PowerPoint packs	Report consumers are able to access the report and interrogate it to discover new insights	10/02/2023 Project End	Power BI Specialist
Output 4			
As Is Data Structure/Architecture	As Is model accurately reflects the data structures (new and existing) at the end of the project New data structures are clearly annotated	13/01/2023 V1 for Mid Point Review 17/02/2023 V 2 for Project End	Data Architect
To Be Data Structure/Architecture	To Be Model clearly identifies proposed future developments and the impact on the As Is	22/02/2023	Data Architect
Internal Capability Development Outcomes			
Knowledge transfer and PA build document.	Ability for the reporting team to be able to manage and maintain the Power App through both knowledge transfer and co-authored design/build document.	17/02/2023	Power Apps Specialist

Deliverable	Success Criteria	Milestone / Date	Owner (who in the delivery team?)
PowerBI development capability	Project Team have developed a capability in Power BI as demonstrated by their creation of a Power BI Dashboard a personal productivity solution and/or a Project Portal productivity solution Ability in at least 6 nominated individuals to maintain PowerBI reports created in the engagement (i.e. making formatting changes to any element, adding or	13/01/2023 Mid Point 17/02/2023 Project End	Power BI Specialist Power BI Specialist
	removing data elements), and also ability to create similar other reports from scratch.		
PowerApps development capability	Project Team have developed a capability in Power Apps/Power Automate as demonstrated by their creation of a personal productivity solution and/or a Project Portal productivity solution	13/01/2023 Mid Point	Power Apps Specialist/ Power BI Specialist
Social Value Outcomes			
Furthering the agenda to normalise PowerBI and PowerApps usage across Defra	When major projects and programmes across Defra have unique reporting demands based on their unique delivery requirements, the Project Portal team (and GCS PMO for GCS projects) should have the ability to meet these.	17/02/2023 Project End	Power Apps Specialist/ Power BI Specialist
Project Closure			

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Lessons Learned/Recommendations Report	Report sets out key lessons from the project and recommendations for the future The report content is drawn from all participants in the project	24/02/2023 Project End	Delivery Manager
Project Closure Report	The report details the acceptance of the project deliverables and ownership of any unfinished/follow on activity Confirmation of the closure/transfer of all project risks and issues Evidence of the projects benefits and how these will be monitored moving forward.	24/02/2023 Project End	Delivery Manager

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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.
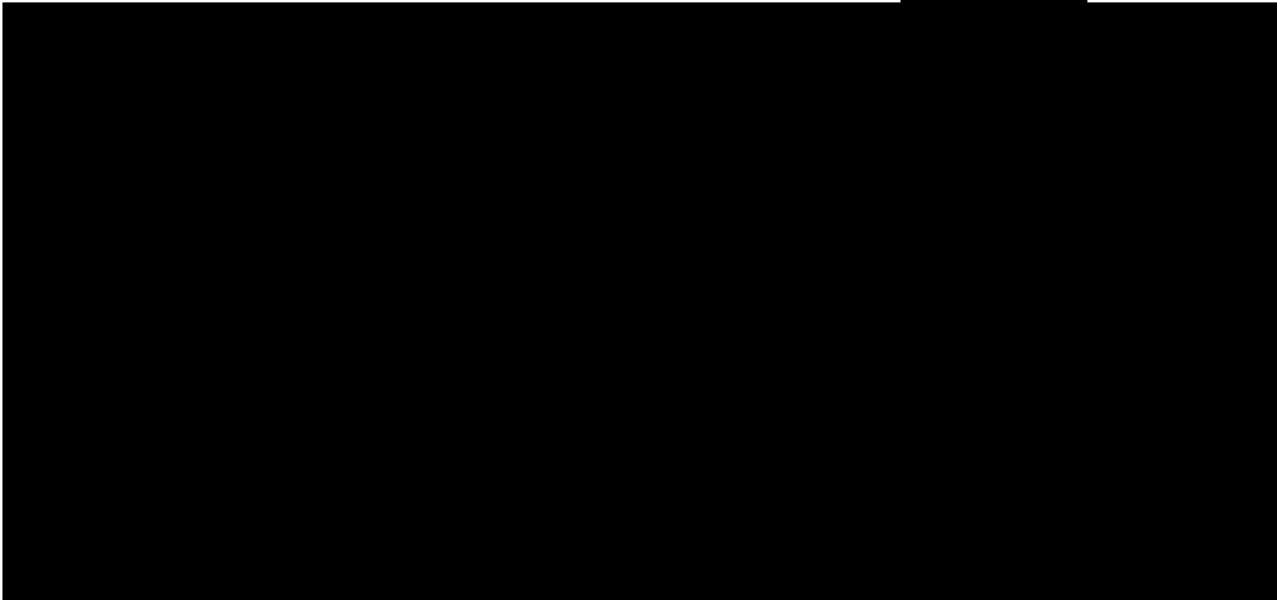
3. Delivery team
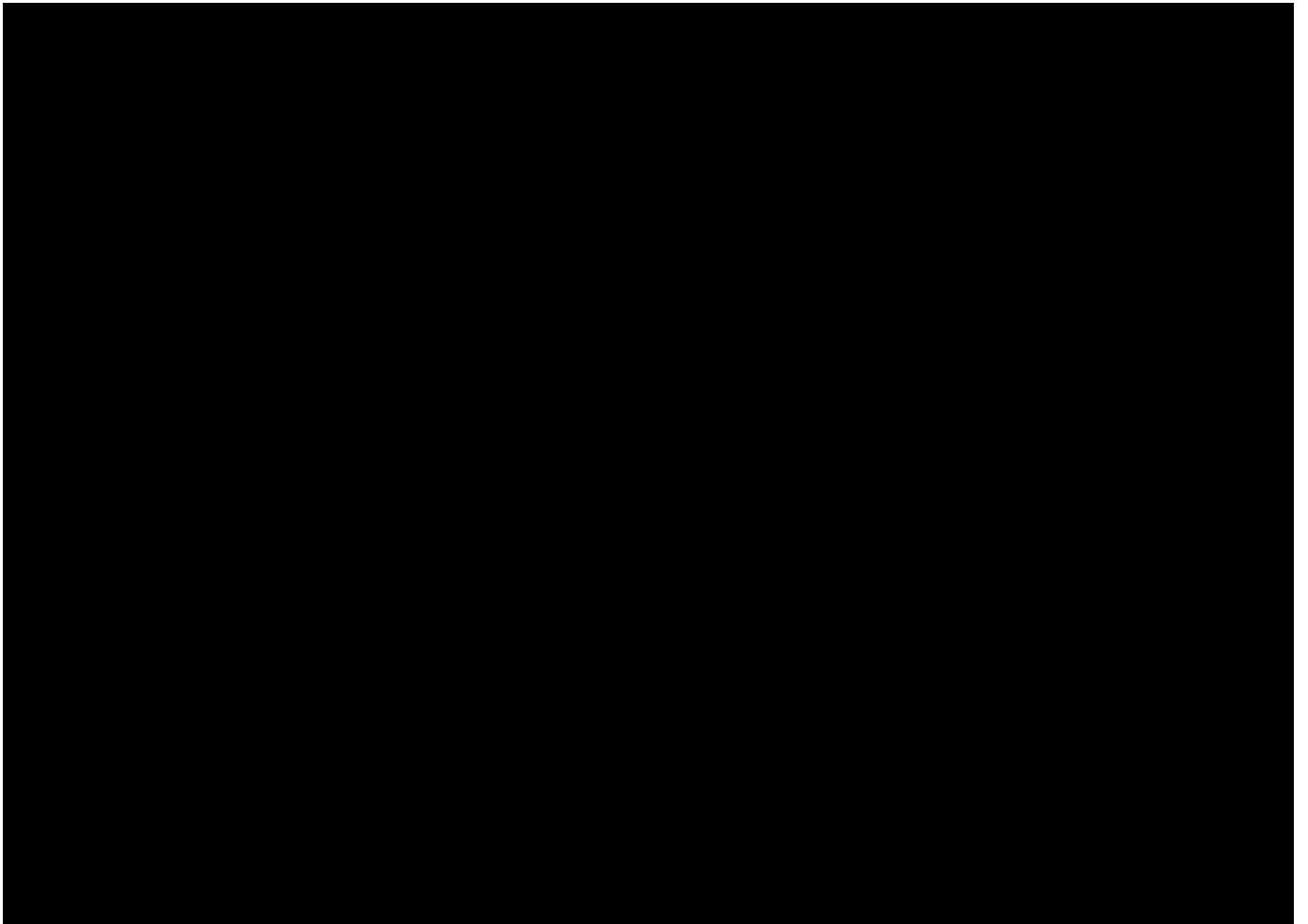
Business Area's team
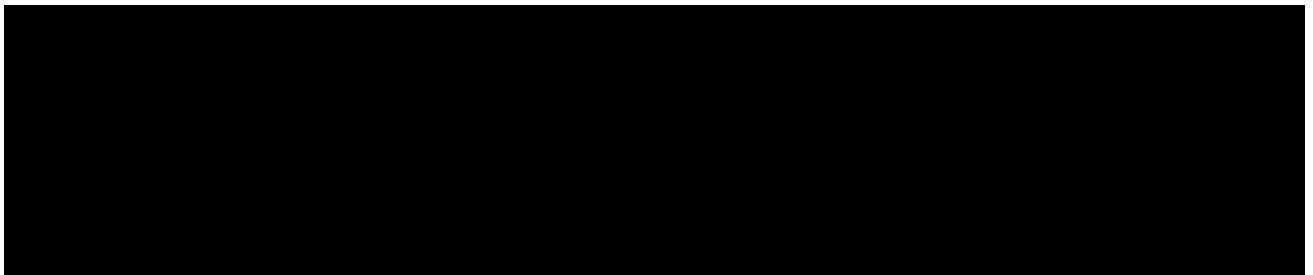
4. Fees

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 £93,999, inclusive of expenses and excluding VAT.

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 monthly basis, to track days worked by our consultants;
- Participation in key governance fora as deemed necessary by the SRO

Key Performance Indicators

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

Feedback and satisfaction

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.

6. Exit management

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

Completion of knowledge transfer and capability development to identified Project Portal and Corporate Services colleagues and completion of all defined deliverables.

The supplier will provide all design documents and source files pertaining to the project The supplier will grant co-ownership[1] of all Power Platform Apps, Flows and other assets, with nominated Defra colleagues
The supplier will delete any commercially information that is not required to be kept
The supplier will prepare a handover note of any outstanding issues to be included in the Project Closure Report

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[1] Not related to IPR. All IPR of deliverables produced as per standard contract. This relates to ensuring that all assets created in the Power Platform are technically owned by at least one Defra member of staff.

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:

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	▪ DPEL agreed ▪ DPEL signed: Supplier, Dept and CO ▪ Purchase Order number	▪ Work can start ▪ Supplier can invoice for work	

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Request

- Contact Defra Group Commercial (DgC)
- Business Area completes consultancy request form and submits to DgC
- DgC review
  - Request progressed → DgC allocate Supplier
  - Request not progressed → Liaise with Engagement Lead on next steps

Engage

- Supplier and Client engage
- Complete PEL and submit to Engagement Lead
- CGB review PEL
  - Approval granted → Satisfy conditions if applied → Commence work
  - Approval not granted → Liaise with Engagement Lead on next steps

Change request

- Contact Defra Group Commercial (DgC)
- Complete relevant documentation and submit to Engagement Lead
- CGB review docs
  - Approval granted → Satisfy conditions if applied → Changes accepted
  - Approval not granted → Liaise with Engagement Lead on next steps