

Framework Schedule 6 (Order Form Template and Call-Off Schedules)

Order Form

CALL-OFF REFERENCE:	DDaT23522 - Service Designer (SD) & User Researcher (UR)
THE BUYER:	UK Research and Innovation (UKRI)
BUYER ADDRESS	UK Research and Innovation (UKRI) Polaris House North Star Avenue Swindon SN2 1FL
THE SUPPLIER:	Methods Business and Digital Technology Limited
SUPPLIER ADDRESS:	Methods Business and Digital Technology Limited Saffron House, 6-10 Kirby Street London EC1N 8TS England
REGISTRATION NUMBER:	02485577

Applicable Framework Contract

This Order Form is for the provision of the Call-Off Deliverables and dated 06/12/2023.

It's issued under the Framework Contract with the reference number DDAT21501 for the provision of Service Designer (SD) & User Researcher (UR).

Call - off Lot(s):

Lot 2

Call - off Incorporated Terms

The following documents are incorporated into this Call-Off Contract. Where numbers are missing we are not using those schedules. If the documents conflict, the following order of precedence applies:

1. This Order Form including the Call-Off Special Terms and Call-Off Special Schedules.
2. Joint Schedule 1(Definitions and Interpretation)
3. The following Schedules in equal order of precedence:

- Joint Schedules for DDaT21501

- Joint Schedule 2 (Variation Form)
- Joint Schedule 3 (Insurance Requirements)
- Joint Schedule 4 (Commercially Sensitive Information)
- Joint Schedule 10 (Rectification Plan)
- Joint Schedule 11 (Processing Data)

- Call-Off Schedules for DDaT23522

- Call-Off Schedule 1 (Transparency Reports)
- Call-Off Schedule 2 (Staff Transfer)
- Call-Off Schedule 3 (Continuous Improvement)
- Call-Off Schedule 5 (Pricing Details)
- Call-Off Schedule 7 (Key Supplier Staff)
- Call-Off Schedule 9 (Security)
- Call-Off Schedule 10 (Exit Management)
- Call-Off Schedule 20 (Call-Off Specification)

4. CCS Core Terms (version 3.0.4)

5. Joint Schedule 5 (Corporate Social Responsibility) - DDaT21501

6. Call-Off Schedule 4 (Call-Off Tender) as long as any parts of the Call-Off Tender that offer a better commercial position for the Buyer (as decided by the Buyer) take precedence over the documents above.

No other Supplier terms are part of the Call-Off Contract. That includes any terms written on the back of, added to this Order Form, or presented at the time of delivery

Call – off special terms

Not Applicable

CALL - OFF START DATE: 15/12/2023

CALL – OFF EXPIRY DATE: 20/03/2024

CALL – OFF INITIAL PERIOD: 66 days

Call – off Deliverables

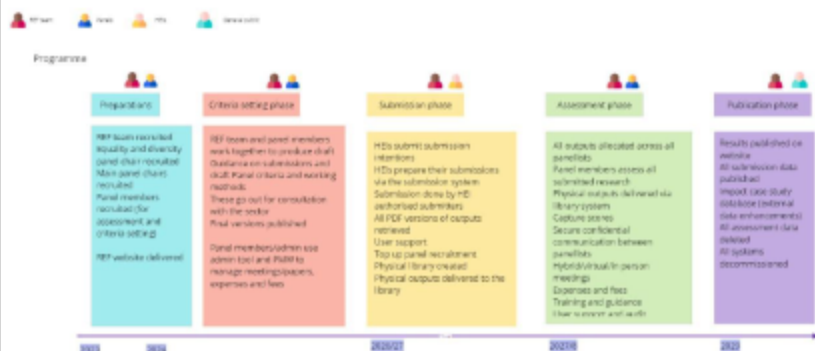
SoW 1. Service Designer (SD) and User Researcher (UR) to work within our existing Delivery team

The SD and UR resources will focus on problem exploration with a primary objective to understand the problem/opportunity, gather evidence to articulate the impact, identify options to solve the problem and test/validate to determine the recommended solution for the delivery of the MVP and beyond.

End to end user journey for REF 2028

The Research Excellence Framework (REF) is an exercise to assess the quality of research in all UK Higher Education Institutions (HEIs). The previous REF concluded in 2021 and the next one will conclude in 2028. The exercise has run every 5-7 years for the past 30 years. In recent iterations, there has been a growing dependence on IT systems to facilitate and execute the exercise. The previous two exercises have been carried out using a range of complex, bespoke software solutions. The aim for REF 2028 to return to fundamental principles. We intend to challenge the replication of previous practices and instead focus on creating software that aligns more closely with the exercise's needs.

The exercise runs in four distinct phases, which each have their own software requirements and deliverables.



Timeline of REF 2028 and activities in each phase

Deliverables:

- Capture and document the 'as-is' user journey based on the REF 2021 exercise

- Capture and document specific pain points in that journey
- Validate perceived pain points from REF 2021
- Work with REF stakeholders to prioritise pain points for further analysis/discovery
- Design, prototype and test potential solutions to address pain points
- Design and document the end to end 'to-be' process of the REF 2028 exercise based on the evidence gathered.

Outcome:

Documented end to end user journeys for REF 2028.

Prioritised list of pain points for further exploration.

Deep dive focus into areas below, provided in priority order.

Timeline: 12 weeks with write up.

Deep dive - Panel recruitment (priority 1)

A solution is required to support the recruitment of approximately 1,200 panel members. This was previously achieved by a process of nominations. Potential panel members were nominated by participating nominating bodies. Over 4,000 nominations were then manually processed, assessed and recruited by 4 teams of panel executives. Invites and appointments were also manually processed and managed. Appointed panel members then had to be manually onboarded onto the REF panel members' website. A solution for supporting panel recruitment needs to be identified early in 2024. The areas for investigation include (this list may not be exhaustive):

- Support the submission of application for various roles
- Support the dissemination of volumes of applications to groups of reviewers for shortlisting and selection
- Enable the selected nominees to be invited for appointment
- Process acceptance of terms and conditions of employment
- Onboard appointees to REF specific systems

Outcome: Analyse user needs, deliver recommendations for alpha version of solution, investigation into possible solutions.

Deep dive - Panel member online versus offline working

- During the assessment phase the panel members will have access to a secure, closed email and document sharing solution. The aim is to select the platform to deliver this to enable single sign on for panel members to all systems from the beginning of the exercise.
- Data retention schedules are critical during the REF exercise, with key assessment data being deleted as soon as the REF results are published.
- Previously panel members have had a strong desire to be able to undertake assessment work in an offline fashion – primary drivers for this have been, for example, working whilst travelling. In previous exercises panel members have been given encrypted USB sticks containing PDF copies of all electronic articles for assessment.

The REF team have security concerns around the downloading of information to local devices in relation to data retention. There are potential security concerns around panel members working on confidential REF work in public spaces.

User research is required to understand the needs and constraints for panel members when working solely in an online capacity. Research should also consider the internal user needs regarding information security and knowledge and information management.

Outcome: User research outcomes to be reported back to REF team.

Roles Required:

Role Name	Total Number of Days	Proposed Start	Proposed End
User Research	Full time	04/12/2023	08/03/2024
Service Designer	Full Time	04/12/2023	08/03/2024

Maximum Liability

The limitation of liability for this Call-Off Contract is stated in Clause 11.2 of the Core Terms

The Supplier shall not be liable for any claims or losses arising from the negligent acts, omissions or wilful default of the Buyer.

Call – off Charges

The maximum value of this contract is £83,160.00 excluding VAT.

	Day Rate	Number of Days	No of Days (FoC)	Total Value
Service Designer				£42,210.00
User Researcher				£40,950.00

Reimbursable Expenses

None

Payment Method

All invoices must be sent, quoting a valid Purchase Order Number (PO Number), to:

To avoid delay in payment it is important that the invoice is compliant and that it includes a valid PO Number, item number (if applicable) and the details (name, email, and telephone number) of your Buyer contact (i.e. Buyer Authorised Representative). Non-compliant invoices may be sent back to you, which may lead to a delay in payment.

Payment Method is via BACS.

Where a purchase order has not been provided to the Supplier by the Call-off start date, the Buyer shall provide the Supplier with a purchase order in sufficient time to enable the Supplier invoice for the services provided under this Call-off contract.

For the avoidance of doubt, the Buyer shall remain responsible for making payment for services required by the Buyer and provided by the Supplier under the Call-off contract where a purchase order has not been provided.

Buyer's Invoice Address:

UK Research and Innovation (UKRI)
Polaris House
North Star Avenue
Swindon SN2 1FL

Buyer's Authorised Representative**Buyer's Environmental Policy****Buyer's Security Policy**

[Data protection policy – UKRI](#)

Supplier's Authorised Representative**Supplier's Contract Manager****Progress Meeting Frequency**

Progress Report Meetings will be held weekly

Key Staff

**Key subcontractor(s)**

Not Applicable

Commercially Sensitive Information

Pricing Information submitted for this requirement

Service Credits

Not Applicable

Additional Insurances

Not Applicable

Guarantee

Not Applicable

Social Value Commitment

As per PROJ1.2 & PROJ1.3 of tender documentation for the award of DDaT21501 – Lot 2.

For and on behalf of the Supplier:		For and on behalf of the Buyer:	
Signature:			
Name:			
Role:			
Date:	14 th Dec.2023	Date:	

