Department for Environment Food & Rural Affairs

Defra Group Management Consultancy Framework: Project Engagement Letter

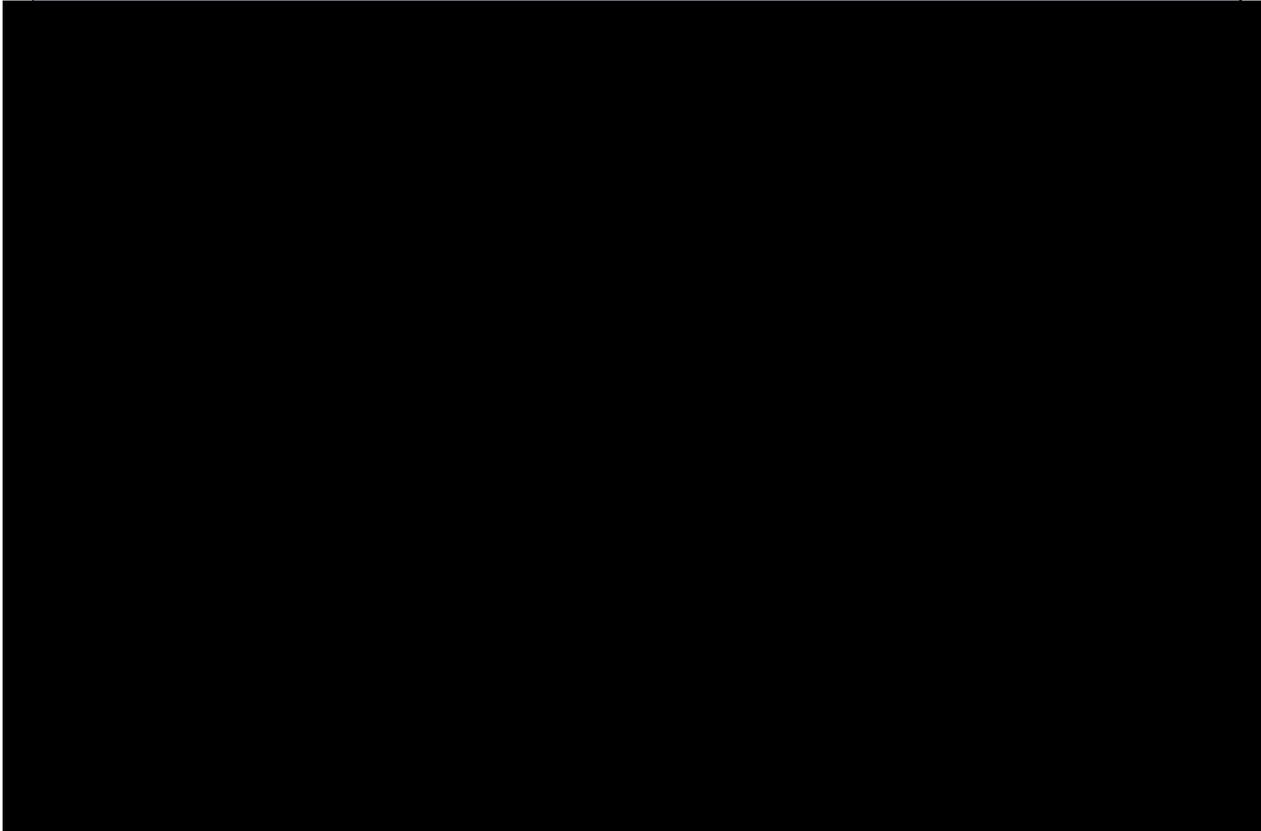Completed forms and any queries should be directed to Defra Group Commercial at ██████████

Engagement details	
Engagement ref #	DPEL_61545_014
Extension?	No **DPEL Ref.**
Business Area	Human Resources, Group Corporate Services
Programme / Project	Performance and Development Review
Senior Responsible Officer	██████████
Supplier	PA Consulting
Title	Launching Performance and Development Framework in Defra group
Short description	A 13-week engagement to support in-house experts finalise a new performance and development framework and associated products/enabling tools, and support the delivery of workshops for 5,000 line managers.
Engagement start / end date	Proposed start date: 04/01/2023 ██████████ Proposed end Date: 31/3/2023
Funding source (CDEL/RDEL)	RDEL
Consultancy Spend approval reference	Not required
Expected costs 22/23	£99,840
Expected costs 23/24	£0
Expected costs 24/25	£0
Dept. PO reference	TBC Dept. PO reference # (to allow for Defra Group recharge)
Lot #	Lot 2
Version #	V1.0

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Approval of Project Engagement Letter

By signing and returning this cover note, Defra accepts the contents of this Project Engagement Letter as being the services required and agrees for PA Consulting 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		
11/1/23	12/01/23	12th January 2023
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

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1. Background

HR are in the finalisation and launch phase of a major project to replace the existing performance and development framework in Defra group (Defra, Natural England, APHA, RPA, VMD and Cefas). This means the finalisation of supporting products/enabling tools and the creation of a performance hub to house them, with completion by end January 2023. In advance of our scheduled go live on 1 April 23, we need to upskill over 5,000 managers to prepare them to enact the new framework and bring it to life for their teams. Their leadership is critical.

This phase of the project needs resourcing and comes at a peak in activity and priorities for HR with unprecedented environmental factors such as cost of living crisis and industrial action. HR has the budget but not the resource to support all priorities needed by Defra group and therefore have looked to priority activity where we can buy in support and expertise through this critical last quarter of 22/23.

The Performance and Development review is a transformational change similar to what other government departments such as DWP have rolled out. The summary of the change is outlined below:

Old process	New approach
Disparity in experience of each person	A fairer inclusive approach
Fixed cyclical process with formal reviews points	Monthly meaningful, holistic conversations focused on the individual.
Focused on previous delivery	Focus on future delivery
End of year performance ratings	No formal categories or end of year pay award. Performance will be measured by the delivery outcomes for individual goals; great performance recognised through existing recognition frameworks, and poor performance will be identified through the revised procedures for managing poor performance
Removal of link with annual performance decision and pay award.	A greater focus recognising people throughout the year.
Individual objectives set at start of year using SMART methodology.	Agile goals which can be a mix of individual, team, and corporate, may span over any period and reviewed at regular intervals dependent on their overall length and adjusted as needed
Traditional policy layout, accessible via intranets	Dynamic performance hub that will house all guidance, all enabling tools and offer a workspace for line managers
Paper based	Phased change initially using template but moving to a digital platform by April 24

There is a small project team leading the change and the consultancy support and expertise will help with finalisation of products/enabling tools and the launch activity for line managers. This will allow project team to concentrate on communications and engagement activity, ensuring leadership support, and managing change readiness and success measures.

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2. Statement of services

Objectives and outcomes to be achieved

Output
- An online and interactive performance hub housed on SharePoint which all managers and employees can access to find branded guidance and support (content already developed) which feels quick, slick, innovative, colorful, and exciting.
- A training workshop developed for line managers to introduce the new framework and lead them clearly in what they need to do
- Train the trainer sessions for business leads who will run several of the virtual workshops across the organisations.
- An agreed approach to the roll-out of short virtual workshops for circa 5,000 line managers through February and March

Objective
- Leaders across the business are accountable for the success of the new framework and associated practices in their area. They actively champion and are enthused.
- The new performance framework is understood by line managers, and they can inform their teams of the differences, the case for change and how it's better
- Line managers feel confident and capable to manage their team through the new framework and are empowered by the content
- Managers and employees can easily access the support and guidance they need via an interactive online performance hub

Outcomes that will be enabled by the work
Successful launch of the new framework by:
- ensuring supporting products and tools are finalised, branded, polished and can be easily accessed.
- developing a workshop for all line managers so they can understand what is expected of them and how the new framework will support them and their teams, and equipping fellow trainers to deliver the training via a 'train the trainer' session

Scope

In scope*:*
- Access to key project documents, draft products/enabling tools/associated processes and the performance hub to support the finalisation, branding and images that support the end-product landing well (include guidance and learning resources)
- Access to the overlaying L&D offer (tbc with L&D team)
- Draft outline of the workshop material and planned logistics to be shared beginning January to get expertise and support in finalising the content, planning logistics, and how we adapt for train the trainer

Out scope:
- Communication and engagement plan that will build awareness of the changes will be undertaken by the project team in HR
- Research, design and sign off stages of the project are completed.
- Complex technical configuration of SharePoint site

Assumptions and dependencies

Assumptions
- That discovery, design and approval stages have already been undertaken and relevant information already exists
- That guidance and supporting products are drafted and the project team are on hand to explain the steps taken and what is needed to finalise/review
- That in-house resources will manage queries and ongoing upkeep of the finalised products
- Consultancy is required to finalise the content through professional branding and digitalisation of enabling tools where possible (advice on this sought from Consultancy), and manage the launch with support from project team and business leads
- Consultancy has HR expertise and experience of developing and launching similar projects across a multi-site/multi-org business, and expertise in upskilling managers
- That DEFRA team will lead on adding the content to the SharePoint site with the design of the site is done by the supplier. DEFRA will also lead on maintaining the site after the design is complete.That consulting time recovered by quicker design completion, can be utilised in other project areas including workshop delivery within agreed budgets.

Dependencies
- Close working between consultancy and project team to manage dependencies between communications and engagement and the performance hub and workshop launch
- All work needs to be completed in quarter 4 to allow the go live date of 1st April 2023

Risk management

Primary risks are:
- Tight timescale for finalisation of workshop material and performance hub. Our mitigation is that the content is developed so this is about presentation, branding and improvement to all content to ensure that it is professionally branded, slick and engaging.
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Deliverables

Performance hub – professionalising the SharePoint hub and ensure it's dynamic, easy to use and navigate, taking and building on the branding concepts and ensuring this works on SharePoint. Using experience of working with similar frameworks to review content including guides and learning resources, finalise the products and provide recommendations where improvements have been identified.

Design and branding experience is key as this is critical for us to land this project and the new approach in a way that looks and feels different and leading edge. This would include (but isn't limited to):
- Designing an interactive/online infinity loop as the landing page graphic (based on prototype)
  Advise on our use of the logo to maximise impact and ensure a strong theme throughout our material
- Advice on and provision of supporting imagery for all content, materials and performance hub, which goes beyond stock imagery. Advice sought from consultant on how to make this relevant to the Defra group organisations who have a strong environmental identity

- Packaging of associated products including skills guides to ensure string themes are evident, that they interact properly with each other (e.g., language, links etc in recognition that multiple authors have contributed)
- Short video or series of videos (advice sought from Consultant) to give overview of new framework using infinity loop

26 days' work (15 from person B, 5 from PA designer, 2 ███████████████████

PA's estimates are on the assumption that we will need to review the customer journeys and user experience and as such we've include 15 days of digital user experience effort as the value comes in consultation and engagement with target users, iteration and further improvements which we'd over three weeks.

We will work in an agile and flexible way with regular review of outputs to ensure that the budgets and outputs are managed effectively. Katherine will be responsible for managing this activity and ensuring that the design outputs and user journeys meet DEFRA's needs.

Support launch to all line managers:
Supporting **finalisation of workshop content** including branding and visuals to professionalise content, including full review of materials
6 days' work (3 days ████████████████ days of PA designer)
PA have assumed that some additional graphic design effort may be required to finalize the material. This will be confirmed prior to drawing down on this effort.

Support set up of workshops to 5,000 line managers alongside a business lead. Ahead of the workshops, prepare and deliver train the trainer sessions for business leads.
20 days' work (1 day from ████████ providing senior insight and expertise, 27 days from ██████████████

Run workshops to line managers. Initial volume expected c20 workshops, but this will be regularly assessed and agreed in a flexible way where consultant resource is recovered elsewhere to agreed budget caps.

The assumption is that 3 workshops can run per day (taking account of setup time, and time to document any outputs).

Deliverable	Success Criteria	Milestone / Date	Owner (who in the delivery team?)
Project Stage A			
Design interactive infinity loop graphic with links to other content so it can be used as a click guide	A graphic that works on SharePoint and links into content That the loop and the performance hub become the recognisable image and tools of People Performance in the future.	Complete 16/1/23	PA Designer

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Deliverable	Success Criteria	Milestone / Date	Owner (who in the delivery team?)
Design clear branding and imagery themes, and work these into all content including the performance hub itself as well as the material it houses.	Branding and images added to content across the performance hub	Complete 23/1/23	PA Designer
Review content on hub and put forward suggested changes to help the accessibility, look, feel of the hub and ensure language and content consistent	Suggested changes agreed with project team ensuring content is consistent and clear	Complete 31/1/23	███████
Review workshop material and improve visual look and feel adding branding. Develop into a train the trainer session	Professional and clear content and branding/visuals that will enable managers to build their knowledge and know how they turn this into ability to enact the new framework	Complete by 16/1	█████ – working with PA designer
Design, develop and run train the trainer sessions: run 2 or 3 half day sessions	Business leads are upskilled and enthused and ready to deliver workshops	Complete between 30/1/23 and 10/2/23	██████
Project Stage B (additional stages can be added)			
Delivery of Workshops		To be Agreed in a flexible way where consulting time is recovered elsewhere, to agreed budgets. Between Feb and end of March	██████
Internal Capability Development Outcomes			
Social Value Outcomes			

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| Deliverable	Success Criteria	Milestone / Date	Owner (who in the delivery team?)
That all material/enabling tools and associated processes are inclusively designed and accessible to a range of employee groups (both field and office based)	That the lived experience of our minority groups, younger employees, and employees at the lower end of the grade scale is positive and that they can clearly see themselves reflected in our presentation. That staff not routinely based in an office environment but who may have mobile devices (iphones/ipads for example), can easily access our content and that it works on those platforms (initial checks by project team have been carried out)	16/1	██████

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

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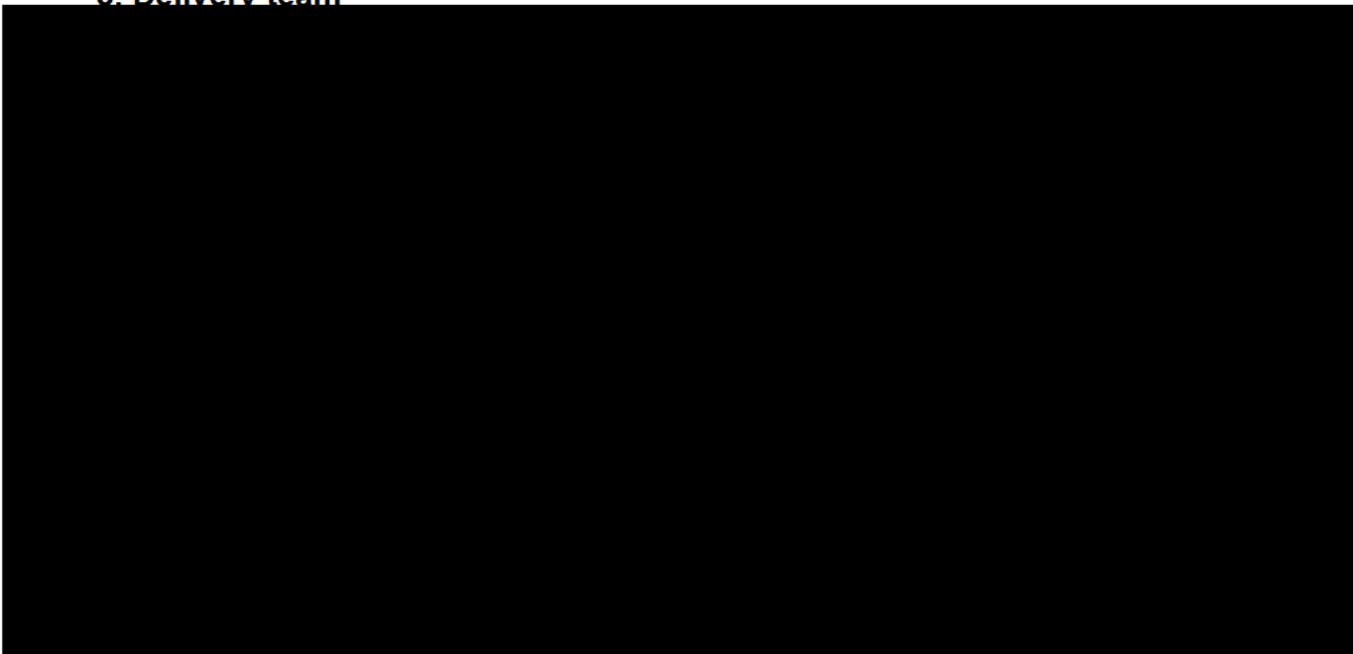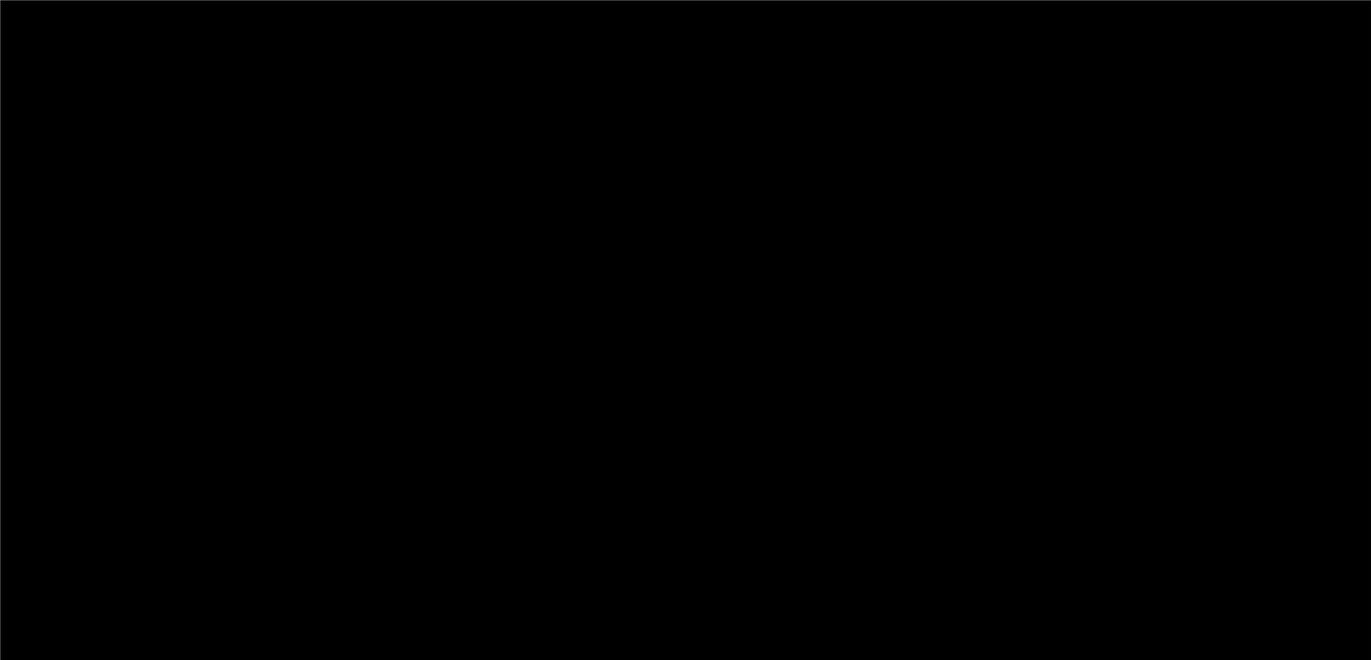
4. Fees

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 £99,840 inclusive of expenses and ████████████

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Grand total		£99,840	

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

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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.
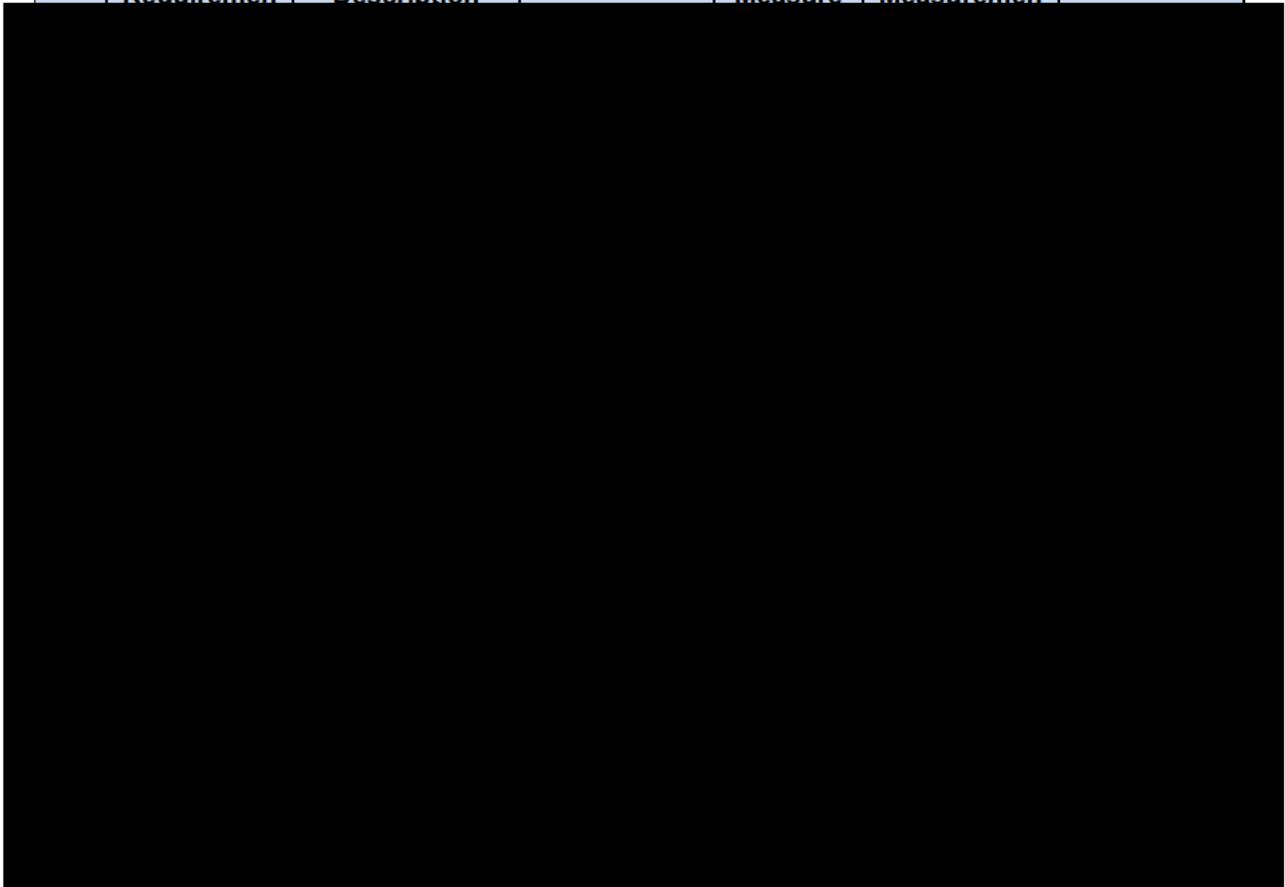
5. Governance and reporting

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;

Key Performance Indicators

KP	KPI Requiremen	Description	Reporting	Who Measure	Method of Measuremen	Performanc

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

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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:

The work is clearly outlined so an exit strategy is straight forward.

Performance hub – a professional SharePoint hub that is dynamic, easy to use and navigate, taking and building on the branding concepts and ensuring this works on SharePoint. Finalised and reviewed products that work from an end users perspective. This includes:

- An interactive/online infinity loop as the landing page graphic (based on prototype)
  Use of the logo to maximise impact and ensure a strong theme throughout our material
- Supporting imagery for all content, materials and performance hub, which goes beyond stock imagery.
- Packaging of associated products including skills guides to ensure core themes are evident, that they interact properly with each other (e.g. language, links etc in recognition that multiple authors have contributed)
- Short video or series of videos to give overview of new framework using infinity loop
- Reviewed content with end users to ensure the customer journeys and user experience via consultation and engagement with target users, iteration and further improvements made.

Support launch to all line managers:

- Workshop for line managers and train the trainer session including branding and visuals
- Delivered train the trainer sessions for business leads. Prepare two additional PA trainers for the roll-out of the training to all line managers.
- Run workshops to line managers. Initial volume expected c20 workshops, but this will be regularly assessed and agreed in a flexible way where consultant resource is recovered elsewhere to agreed budget caps.

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.

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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:

███████████████

█   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