DEPARTMENT FOR WORK & PENSIONS

and

IPSOS MORI

CONTRACT

for

The Provision of Research & Evaluation of Customer and Claimant Communications

Reference: CCCO16A08

ORDER FORM

SUBJECT TO THE CALL-OFF TERMS AND CONDITIONS OF UK SHARED BUSINESS SERVICES LTD. S3 - PRECEDENT FRAMEWORK AGREEMENT

FOR THE PROVISION OF MARKET RESEARCH SERVICES

FROM

Authority	Department for Work & Pensions, Operational External Communications
Service Address	Department for Work & Pensions, REDACTED
Invoice Address	Department for Work & Pensions, REDACTED
Contact Ref:	REDACTED
Contract Value	£100,000.00 (on a call off basis)
Contract Duration	2 years plus 1 year
Order Number	To Be Confirmed
Order Date	To Be Confirmed

TO

Provider:	Ipsos MORI
For the attention of: **E-mail** **Telephone number**	REDACTED
Address	REDACTED

1. SERVICES REQUIREMENTS
Services [and Deliverables] Required: 1st February 2017 **1.THE AUTHORITY'S SCOPE OF REQUIREMENT** The Authority require the successful provider to:

1.1   Use their experience, recommend the most appropriate way of testing materials with the audience group. This could include focus groups, online forums, face to face interviews or telephone surveys. Proposals should be clear about rationale for recommended approach. The participants for these projects will be defined in each project brief, the list below is to give an indication of the breadth of customers the Authority need to test our work. This may include people who are working and therefore consideration has to be given to recruiting people between 8am to 8pm and possibly on Saturdays.

1.2   The Authority customer bases includes:

    1.2.1   Families – this includes communication on health prevention, benefits and entitlements, education choices and caring responsibilities

    1.2.2   Young people – this includes communication on education and skills, preventing risky behaviours and jobs

    1.2.3   Working age people – this includes communication on tax, benefits, workplace pensions, employee rights and advice for the self-employed

    1.2.4   Older people – this includes communication around health, pensions and benefits, and information for those approaching retirement

    1.2.5   Lone parents – this includes communications on Child Maintenance, benefits, entitlements and childcare

1.3   Participants must be:

    1.3.1   aged between specific age range for example from 16-75 - this is dependent on project and will be defined in the brief

    1.3.2   in receipt of the relevant benefit as requested as well as other specific criteria for example being in receipt of specific award components of benefit

    1.3.3   It may be essential that a proportion of the participants are people who act on behalf of a customer in relation to their claim and must include: representatives and parents.

    1.3.4   It may also be essential that participants are representative of the working and pension age groups as well as those diverse long-term health conditions of many Authority benefit customers. There must be a range of participants including customers with the following conditions:
        a.   mental health conditions;
        b.   learning difficulties;
        c.   physical and sensory impairments.

1.4   Recruit and test with a range of people. The Potential Provider must recommend how many participants will be included in testing to ensure a statistically valid sample and to ensure a range of participants are included

1.5   The Authority also require participants from a range of regional areas in Great Britain, to form an understanding of whether there are any differences in findings specific to geographical regions.

1.6   The Potential Provider's response needs to clearly outline their planned recruitment process. Incentives can be used and this should be clearly defined in the Potential Provider's budget along with rationale.

1.7   Outline discussion guides will need to be agreed for each job so that there is a form of structure, and then for additional open discussion within the groups/interviews.

1.8   Run the sessions – including producing discussion guide in advance for sign off. The Authority personnel will want to attend and observe sessions, for information and to adapt to learning over the course of work.

1.9   Write a report detailing the findings from the testing.

1.10 The Authority will provide the successful provider with draft paper communication products.

1.11 The successful provider will need to provide any accessible format versions for participants, if requested.

1.12 The successful provider is to provide robust qualitative research to gather audience insights, readability, levels of understanding, channel preferences and to test new letters/forms/leaflets, including messaging and signposting

1.13 Some research will be to test new products against current products to determine any added value found from getting direct feedback from customers.

1.14   The successful provider may also need to provide robust quantitative research and analysis that will enable the evaluation of communications activity.

1.15   Early findings reports will be required from research sessions, giving the Authority the ability to improve products in real time where possible but within the time of the research work to ensure the best possible product outcome. This will depend on the timescales agreed for each piece of work that comes through, so would be on a job by job basis and be agreed with the successful provider as part of the briefing process

1.16   Outline discussion guides will need to be agreed for each job so that there is a structure, and then for additional open discussion within the groups/interviews. This will be carried out by the Authority providing the Supplier with an initial method of research and agreement with the Supplier as the experts in the field.

1.17   The scope of this requirement covers both the Working Age and State Pension age population, some of the work may be cross cutting of the population if it is a lead from working age to pension age. Each specific piece of work will determine this.

1.18   OED evaluation principles follow the GCS Evaluation Framework - for the purpose of this statement of requirements the Authority want Potential Providers to focus on the outtakes of the work they have already completed. This will be the result of Authority activity on the target audience for example – Impact, Influence, Effects, Attitude and Behaviour.

1.19   The Authority would expect the results to be presented to in PowerPoint and with face to face or video conference meeting in Leeds or London plus a detailed report in Word.

1.20   Each request for research will be different and a brief will be supplied for each one, and more than one could be put forward at any time.

1.21   The initial research project will be linked to State Pension products, the brief and background to this specific job can be found in attached Evaluation Plan (Appendix G). The Authority enclosed some examples for each benefit to give an idea of the scope and requirement for these discrete projects.

1.1a SUPPLIERS RESPONSE

As per the Supplier's proposal of: 7th October 2016

Working with DWP to determine the nature of the research channel

This contract provides DWP with an agile and flexible resource for research and evaluation for its customer and claimant communications. It requires provision of qualitative and quantitative research, and a proactive approach to working with DWP and its partner agencies to make recommendations on future communications activity. There will be a need to provide innovative and creative solutions that reach diverse customer groups in the most cost-effective way.

Ipsos MORI has the knowledge, experience and capacity to successfully meet your requirements, with a proven track record of delivering similar contracts, which require expertise across all methodologies, capacity and structures to support the contracts, a great deal of practical experience of engaging with diverse groups, and excellent understanding of departmental priorities and policies.

Ipsos MORI are very experienced in managing the volume and unpredictable nature of work likely to be commissioned for this contract, including the ability to respond flexibly as new priorities emerge. Ipsos MORI have bespoke systems already developed (e.g. pipeline maintenance, resource scheduling) and understand that importance of delivering 'right first time' regardless of timeframes. In our view, our close working with DWP and HMRC - including immersion sessions and attending strategic planning away days/Ministerial briefings, often at short notice - have been instrumental in delivering and retaining these contracts.

This contract would be led by our specialist Social Change Communications Research Unit alongside our Employment, Welfare and Skills team (EWS). The team includes qualitative and quantitative specialists, with excellent communication skills and strong project management capabilities. Through previous wide-ranging research for the department, Ipsos MORI offer in-depth understanding of DWP's policies, its customer base, current and future priorities meaning Ipsos MORI can design and deliver studies effectively and provide added value.

The core team can be supplemented by 200 researchers from across the Social Research Institute (SRI) to increase capacity, including expertise from the Qualitative Unit, Research Methods Centre (RMC), Behavioural Research Group, Digital Research Unit and Ipsos Connect (private sector advertising research arm). Having several teams with specialist expertise means Ipsos MORI have the capacity to develop surveys, conduct fieldwork and undertake analysis and reporting simultaneously.

The contract would be led and quality assured by REDACTED.

The nature of this contract means it is essential that Ipsos MORI work to support relevant teams across DWP, providing clear information and timetables, and guiding them throughout the process. In our current call-off contracts for DWP and HMRC Ipsos MORI have consistently proven our strength in determining the most effective approach and generally supporting our clients to get the most from the research.

Ipsos MORI offer the full range of quantitative and qualitative techniques, and on each study would undertake the following tasks to determine the most effective approach:
- Identify experts Ipsos MORI would involve (e.g. Qualitative Unit, Research Methods Centre) considering the objectives, products to be tested and audiences
- Appoint a dedicated Project Manager and Project Director
- Attend a set up meeting to agree objectives, design, milestones and deliverables
- Undertake a rapid familiarisation process ensuring the approach is thorough/builds on existing knowledge. This includes rapid review of existing insights into target audiences, both those that DWP can provide and those from existing data (e.g. from a major programme of Generations work, which focuses on generational differences and their implications for public policy)
- Agree a framework for the communications testing (single slide in PowerPoint) which summarises the impact the communications are intended to have on target audiences in terms of outtakes, and where appropriate also outcomes (as set out in the GCS Evaluation Framework). Ipsos MORI can build objectives regarding customer impact into this framework, such as the "RA-RAR" criteria proposed for the nSP testing. This approach has proved invaluable in communications research with government communications clients such as the Home Office, ensuring a clear shared understanding of what the communications seek to achieve and how. Where behavioural outcomes are involved (e.g. PIP claimant testing), our in-house Behavioural Research specialists will be available to advise on any behavioural models that may be helpful
- Provide a detailed timetable/weekly updates (summarising progress/identifying any potential problems/how these will be addressed in our approach)
- Brief the internal team

Some examples of our capabilities are below.

Method		Example
Qualitative research	**Depth interviews** - suitable for exploring complex/sensitive topics; **face-to-face** develops rapport/trust (helpful for longitudinal studies), supports using stimulus material; **telephone** useful for revisits reducing research burden/respondents in work (providing flexibility) **Group discussions** - dynamic forum for discussing ideas; well suited for testing communications materials	154 longitudinal depths (face-to-face/telephone with families/lone parents) for UC Test and Learn Evaluation (DWP) 150 face-to-face depths for PIP Evaluation (DWP) 30 telephone depths for transition to Making Tax Digital (HMRC) 22 groups with employers/workers (including young people) testing automatic enrolment creative concepts (DWP)

Quantitative research	**Face-to-face** surveys allow for longer interview length, stimulus material, (also suitable for those with poor reading/writing skills, language difficulties, long term health conditions) **Telephone and online surveys** - typically lower cost, quicker turnaround **Mixed mode interviewing** effective for boosting response for reduced cost	Face-to-face interviews for DWP research on UC (hour long interviews with 5,530 claimants) and for the Right to Control Evaluation (disabled adults/their carers) Online survey of 1,350 disabled people with fieldwork completed in two weeks (DWP) ESA Evaluation using face-to-face/telephone interviews (DWP)	
Digital research	Capturing 'in the moment' experiences (e.g. **Ipsos Applife**) **Online Communities** - dynamic, interactive, secure 'space' bringing together participants in a range of activities **Online panel** **Device agnostic web surveys**	Ipsos Applife for understanding habits/attitudes of young people towards communications technology (Ofcom) Online Communities for the BBC, Shelter, Food Standards Agency, Highways England, NHS Online panel for testing creatives for new campaign (DWP)	
Omnibus surveys	**Face-to-face** (Capibus), **Online** (i-omnibus), **telephone** omnibus delivering nationally representative samples quickly and effectively	Capibus used to measure impact of DWP's TV-led automatic enrolment campaign i-omnibus used to test State Pensions campaign material (DWP)	

Delivering the work

Recruitment

DWP's target audiences cover a broad range of different people – families, young people, working age people, older people, lone parents, and those with long-term health conditions and in receipt of specific benefits. While broadly similar principles apply to recruiting these groups, our extensive experience with each audience has provided important learnings on how recruitment needs to be tailored to certain audiences. For those with long-term health conditions, for example, Ipsos MORI know the importance of using inclusive terminology in the fieldwork materials, taking a flexible approach (e.g. with regard to interview location, time and length, offering alternative ways of taking part, offering a paired-depth interview with a friend or carer if people find it intimidating to be interviewed on their own, etc.), providing a detailed information sheet during recruitment, and careful interviewer briefing on how to manage the presence of a carer or advocate during the interview.

Ipsos MORI's in-house teams will be responsible for recruitment, providing flexibility to respond quickly to your needs. The recruitment team is highly experienced in conducting this sort of targeted, fast turn-around project. The central coordination team in the London office are in constant contact with a nationwide team of over 100 on-street recruiters. This enables Ipsos MORI to recruit across British regions, enabling the research to explore any region-specific differences. Trained to the highest standards, the local knowledge of these recruiters is vital to ensuring projects' success. Ipsos MORI are able to recruit outside standard working hours, whether early morning, later in the evening, or weekends.

Ipsos MORI work to the highest standards with regard to data storage and security across our recruitment approaches – often exceeding industry standards – and are used to handling sensitive personal information. As evidence, Ipsos MORI were recently awarded the international data security 'gold standard' ISO 27001 – the first research agency in the world to attain this accreditation.

For the nSP project Ipsos MORI will recruit three audiences. Audiences 1 and 2 (pre-claim SP customers within four months of reaching SP age, and existing SP customers) will be recruited by our in-house recruitment team to discussion groups. Although Audience 1 is highly specific, with a very narrowly defined age range, Ipsos MORI have successfully worked with DWP to undertake free-find recruitment with a narrowly defined audience previously on a study on those who may not be eligible for any SP, using measures such as carefully planned strategies for locations where Ipsos MORI might find eligible participants through on-street recruitment, and thorough briefing of our recruitment team on the importance of meeting particular quotas.

Recruitment for Audience 3 (employers of pre-claim SP customers) requires a targeted approach to sampling and recruitment. Given the likely geographic spread of employers and their busy schedules, Ipsos MORI recommend conducting in-depth interviews with individual employers rather than discussion groups, to ensure participation.

Ipsos MORI will work from a purchased sample since your clarification responses indicate that DWP will not be able to provide sample. Ipsos MORI estimate contacting 10 employer leads for each participant recruited, requiring around 100 large employers and 100 SMEs to recruit 20, for example. REDACTED

All companies would receive an advance letter jointly branded with both Ipsos MORI and DWP's logos to convey the sense that the research is independent and impartial but also authorised and legitimate. This will explain the research and reassure employers of confidentiality. Ipsos MORI would also include full contact details of both Ipsos MORI and DWP staff so participants can ask questions about the research and opt in or out if they so choose. For large national employers, Ipsos MORI will make clear in the letter and at recruitment that, as well as the Head Office interview, Ipsos MORI may also like to interview a branch supervisor in the selected region, 'snowballing' site-level leads from Head Office. Ipsos MORI have used this approach before in research, most recently for BIS.

Recruitment would be by telephone using a screening questionnaire. Ipsos MORI would use experienced in-house business recruiters, adept in negotiating gatekeepers and identifying the most appropriate respondents within organisations.

Ensuring participation

Ipsos MORI will use a combination of techniques to ensure turnout at discussion groups and interviews. Participants will be carefully screened at recruitment to ensure they are willing and able to contribute to the research, and that they meet the demographic requirements. Expert recruiters are trained in identifying the right participants – such as HR decision-makers, in the case of employers. They are given detailed background information to share with recruits. This means that recruits know exactly what they are agreeing to participate in and what to expect when they do so. Reminder calls are placed with recruits the day before their discussion group or interview.

Ipsos MORI will provide cash "thank you" payments to participants upon completion of fieldwork to further encourage taking part. Ipsos MORI have given careful consideration as to the incentives that would be required and for these groups would recommend £40 cash per participant. For business participants, this would be higher Ipsos MORI typically offer a REDACTED. In all cases Ipsos MORI will be clear that these payments come from Ipsos MORI, rather than from DWP. Ipsos MORI will over-recruit to ensure numbers; for discussion groups, if too many attend on the day, Ipsos MORI will send the extras away with their "thank you" payment.

Delivery

A range of communications materials (such as letters, leaflets, forms, SMS and websites) will require testing, through qualitative, quantitative or mixed-method approaches as appropriate. Ipsos MORI offer a range of techniques that have been developed through experience of pre-testing and early-stage communications development. These include **Next*Adlab,** a proven mixed-method tool to optimise creative, involving initial quantitative measures collected and shared real-time via mobile TouchPads, followed by deep-dive qualitative research to explore the diagnostics and feedback within the same day.

Materials will be shown in context as far as this is known, and where possible in a distracted environment to gain a more realistic measure of attention. For quantitative work, where possible Ipsos MORI will use test and control cells, which will enable us to observe the impact of the communications materials rather than relying on asking how these have changed perceptions.

Questionnaires and discussion guides will be developed that allow us to capture the extent to which the communications materials are fit for purpose in bringing about the expected communications outtakes (and, depending on the particular testing project, outcomes). Our discussion guides are designed to ensure consistent capture of the outcomes of interest across all groups on a particular project. These will be designed with your input and provided to DWP in advance of fieldwork for sign-off.

For the nSP letter testing, Ipsos MORI would suggest recruiting for eight participants per discussion group – this ensures a more even contribution than for larger group sizes and, therefore, higher quality data and deeper insight. Ipsos MORI recommend groups lasting 90 minutes, since more than 90 minutes can reduce attendance and participation, and it is harder to fit two groups of 120 minutes into a single evening with most audiences. Ipsos MORI very much welcome DWP attending fieldwork for information gathering and to understand fully the context in which discussions take place.

Tried and tested approaches allows participants to consider materials individually and discuss them collectively. This ensures responses and reactions are not unduly influenced by the loudest or most confident voices within a group. It also means Ipsos MORI are able to move beyond top of mind reactions so that the insights generated are based on deeper consideration of a range of creative options.

Ipsos MORI would begin with some broad discussion of participants' existing awareness, knowledge, and attitudes. For the nSP testing, establishing what participants know about the SP and letters they may have received previously – and what they *think* they know – allows you to understand the context in which materials are being discussed. Insight from these key audiences is essential to ensuring the effectiveness of the communications materials.

Following this initial warm-up, Ipsos MORI will show each of the 6 letters in turn. Letters would be provided as paper versions, ideally within envelopes to best mimic real life situations. Ipsos MORI will also agree with DWP in advance the use of accessible formats, depending on the specific audiences (e.g. for those with long-term visual impairments). The order in which letters are shown will be rotated across the groups, so that reactions across the study are not overly influenced by order effects.

Reactions will be gathered individually from participants through simple post-it note exercises or using a short self-completion form. This means that all participants give their own unbiased responses, uninfluenced by the opinions of others present. The moderator will then ask participants to discuss their individual reactions collectively as a group – notes and forms will be collected and used in subsequent analysis.

Ipsos MORI will ask participants to describe immediate reactions to the content and look of each letter, establishing top of mind reactions to visuals and wording. Once this process has been repeated for each option, Ipsos MORI will compare and contrast, establishing a broad preference across the options. Ipsos MORI will then explore each option in more detail, starting with the most preferred option, covering level of understanding and messaging (what is each letter saying to them, how might they describe the contents in their own words?), readability (which details are they drawn to and why, which elements do they find off-putting and why, what do they think others might have difficulty with?) and channel preferences (how would they expect/ like to receive this?)

Ipsos MORI will encourage participants to consider whether or not there may be elements of different iterations that may be effectively combined. Finally, Ipsos MORI would revisit the earlier order of preference and discuss any changes of opinion.

Participant feedback will be captured through a mix of exercises, self-completion forms, flipchart notes, and audio recordings – all discussions will be digitally recorded. This is a crucial part of the analysis process, allowing us to extract detailed verbatim comments.

Analysis and interpretation

Ipsos MORI ensure a robust and agile approach to sharing the research findings, through a combination of structured analysis and immediate feedback. For fast turnaround qualitative projects, Ipsos MORI would have daily calls the morning after any evening discussion groups in order to share emerging findings. This enables an iterative approach to the fieldwork, tweaking the guide and questions Ipsos MORI ask participants as Ipsos MORI proceed.

Ipsos MORI have considerable experience of delivering fast-turnaround qualitative projects and are adept at handling and analysing the considerable amounts of data that studies like this generate. A rapid yet rigorous approach to analysis will be required to deliver these studies within timeframes. Tried and tested **Rapid Qualitative Data Analysis** (RQDA) approach draws on Framework, but makes certain adjustments to ensure speed without compromising quality.

Ipsos MORI will:

- Principally deal with structured field notes generated by note-takers, given there is little time available for full transcription from audio recordings, and develop a focussed, research question-led data extraction template in advance of fieldwork;
- Create a shared Excel template which enables Ipsos MORI to uncover how views on different strands of the communications mix differ by audience subgroups in a robust way;
- Augment this approach by the use of saliency analysis where themes are prioritised according to frequency of appearance and/or researcher interpretation of importance; and
- Hold team discussions – a crucial component of RQDA – in helping both the data management and interpretive stages of analysis.

Ipsos MORI welcome DWP attendance at the internal debrief sessions, which will allow DWP to be familiar with what participants are saying and the issues they are raising, as well as consider the conclusions Ipsos MORI are drawing and how feasible these are for DWP to take forward.

This close working style is fundamental to ensuring Ipsos MORI produce actionable insights.

Please explain how you will work with the Authority to provide recommendations on future communication activity (particularly channel mix)

Ipsos MORI work with government departments, planning agencies and media buyers to provide evidence-based recommendations for enhancing communications activity; encompassing targeting, messaging and channel mix. A close and effective working relationship with relevant teams in DWP (and partners) is essential, as is the research team having the expertise to draw insight and pointed recommendations from the data. Our systematic processes and experienced team will ensure you gain maximum benefit from the contract.

Our team brings extensive knowledge and understanding of a range of DWP policy areas as well as experience in working closely with communications teams across sectors. Ipsos MORI have expertise in delivering communications testing across sectors, with multiple audiences and where multiple media are involved This experience and understanding will be critical in ensuring recommendations are fit for purpose and have maximum impact.

Our approach reflects the following principles:
- **Impactful**: demonstrating the impact of communications activity and how this varies with tailoring, sharing it widely.

- **Open-minded**: implementing innovative and cost-effective solutions, looking at each project individually rather than implementing the same solutions.
- **Evidence-led**: drawing on the full range of data available, while being stringent and robust in our analysis.
- **Challenging**: questioning within the partnership to push ourselves towards being the most efficient and effective evidence based partnership

Ipsos MORI will make evidence-based observations and recommendations on how the communications materials can be refined and improved. For the nSP letter testing, Ipsos MORI would compare the impact of the system-generated letters with their clerical equivalents and recommend, based on the testing insights, which are the best candidates to take forward and what refinements are required. Where communications are intended to have behavioural outcomes, Ipsos MORI will include behavioural insights analysis, working with our in-house Behavioural Research specialists.

As well as recommendations for specific future communication activity for particular projects, Ipsos MORI recognise the benefits of sharing learnings and would work with DWP to create a readily accessible online **evidence hub** (with secure access agreed and incorporated as appropriate) where key learnings can be shared around effective messaging for different audiences and channels.

Ipsos MORI have worked closely with DWP, HMRC, the Home Office, as well as non-governmental clients such as the Samaritans, to develop a wide range of qualitative, quantitative and mixed-methods designs which have had a subsequent positive impact on communications activity. For example, work with Samaritans brought about a significant shift in the focus of two of their campaigns, where overlap between campaign strands was avoided (and money saved) through effective testing.

Key steps to ensuring an effective relationship with DWP throughout this contract would be:

- Developing an approach to facilitate the robust identification of variations in message, tone and channel. The approach for each project will be designed in close collaboration with DWP and Ipsos MORI would draw on relevant expertise across the team. Ipsos MORI would suggest a set up call/meeting where Ipsos MORI would glean relevant information and input to inform suggested approaches.
- In order to provide clear recommendations on channel mix (or for message content, tone or targeting) it is critical to consider the range of options that are available and develop a matrix which allows different options to be tested with appropriate audiences and which allows for direct comparisons, incorporating a test-control design where applicable. A considered approach to sampling and analysis is key to disentangling the impact of different strands of the communications mix. Within quantitative research sample sizes across key cells must be considered so that boosting, stratifying or alternative approaches may be used. At the analysis stage, correlations can be combined with multivariate techniques (e.g. our proprietary Brand*Graph360°) to disentangle impact as appropriate. Linking of data with other sources (i.e. website traffic, social media metrics) can provide further context and input in some cases.
- In qualitative testing, the sample matrix will be designed so that different audience subgroups are covered effectively. Channel preferences can then be explored with each subgroup in order to draw evidence-based conclusions regarding channel mix, as experience tells us these will vary considerably across demographics.
- Building interim outputs into the timetable prior to the final topline findings. This will provide an early indication of key themes as well as a basis for further discussions around the analysis and reporting. An iterative approach is critical in reaching the most beneficial end results.
- An initial debrief session (telecon/face-to-face) with the DWP project team (and relevant partners where appropriate) to discuss initial findings, key insights and trends, as well as hypotheses and implications for reporting and for future communications activity. This would mirror the process Ipsos MORI have successfully used with DWP colleagues within our work on pensions communications.
- Following initial analysis of the data Ipsos MORI would provide a summary of top actionable insights from the research.
- A full interactive debrief with a wider audience would follow if agreed appropriate. This would be delivered by the senior members of the project team, with additional input from colleagues with

specialist knowledge as appropriate (e.g. members of our Analytics, Behavioural Research, Advertising, and/or Evaluation teams) and would include clear recommendations for future communications activity, as well as insights for programme and policy colleagues if appropriate.

Adhering to service level agreements and maintaining a high quality service

DWP need an experienced and committed provider to deliver expert advice on testing a range of communications with diverse customer and claimant groups. At Ipsos MORI have the experience and commitment to ensure successful delivery of this contract, including adhering to the service level agreements set out in the ITT.

Account management

The contract would be led and quality assured by REDACTED.

REDACTED would coordinate the contract by liaising with relevant methods experts and research teams to ensure the best quality service to meet the objectives of each project. REDACTED would ensure a fully joined-up service and a continued sense of learning across call off projects and other communications work, for DWP and other clients. This role is key to developing a sense of partnership, providing DWP with a 'trusted adviser' to speak to in relation to project issues and for wider research advice.

Supporting REDACTED would be **a core team of researchers**, drawn from Ipsos MORI's 30-strong Employment, Welfare and Skills team, who manage much of Ipsos MORI's work for DWP. All researchers in this team have excellent communication skills, strong project management capabilities and desire to produce the very best work. Having a core team in place will facilitate cross-contract learning, which Ipsos MORI will support with regular internal knowledge sharing sessions. If needs be, the core team can draw on the wider resources of SRI which numbers over 200 researchers. Having access to this wide team will ensure that Ipsos MORI are able to adhere to project timescales by enabling swift access to additional resources as required.

Team member	Responsibility	Meeting the needs of the contract
REDACTED	REDACTED	▪ Communications specialist, with over 20 years' research experience ▪ Worked closely with the DWP pension's communications team over the past four years, as well as Home Office, UKTI and others.
REDACTED	REDACTED	▪ Experience of delivering multi-methods studies for DWP (e.g. Universal Credit Test and Learn Evaluation, In-Work Progression RCT) ▪ Expertise in hard-to-reach and vulnerable groups
REDACTED	REDACTED	▪ Managed range of projects for DWP among customer and claimant groups (e.g. Right to Control Evaluation) ▪ Experienced in fast turnaround online communications testing and omnibus tracking studies (e.g. DWP Communications research, Pension Wise, Samaritans)
REDACTED	REDACTED	▪ Work across qualitative and quantitative methods and for DWP (e.g. Universal Credit Test and Learn Evaluation) ▪ Experienced in communications research and practical issues of researching different audiences (e.g. older workers

		and pensioners, young people, people with long term illness)

Service delivery

On each project, Ipsos MORI will:

- Appoint a dedicated Project Manager and Project Director with the right blend of expertise depending on the requirements of the study. The Project Director (Research Director/Associate Director depending on the study) would be responsible for ensuring the project runs to time; addresses all of the requirements in the brief and signing-off fieldwork materials/outputs. The Project Manager (Research Manager/Senior Research Executive) would be responsible for day-to-day running of the study. The team would also include at least one Research Executive supporting in project delivery. DWP would have contact details for all team members, and Ipsos MORI would ensure any project specific queries would be replied to within 24 hours (major issues would be reported on the day they happen).

- Identify experts that would be involve – REDACTED would liaise with other teams across Ipsos MORI including the Qualitative Unit, Research Methods Centre (RMC), Behavioural Research Group, Digital Research Unit and Ipsos Connect (private sector advertising research arm).

- Attend a set up meeting to agree objectives, design, milestones and deliverables, and other face-to-face meetings as required.

- Undertake a rapid familiarisation process ensuring our design is thorough and builds on existing knowledge.

- Provide weekly updates (with detailed timetable) summarising progress, identifying upcoming milestones, potential problems and mitigations.

- Hold regular internal project management meetings including key operational staff (e.g. fieldwork and data processing) at relevant points.

- Post-project review meeting with DWP on completion of project.

Ipsos MORI have considerable experience of delivering research (from proposals to research outputs) in tight timescales and recognise the need to act rapidly to inform development and planning. Ipsos MORI confirm that Ipsos MORI can meet all the timings set out by DWP in the ITT, as outlined below (exact timeframes will be agreed in conjunction with DWP on each project dependent on provision of materials from the department and the audience Ipsos MORI are seeking to recruit).

Activity	Timeframe (maximum durations)
Meeting with client team for project briefing	5 working days after project brief received
Proposal submitted for discussion with DWP outlining our suggested approach to the project, including all costs, broken down by the rate card and a draft timetable	5 working days after project brief received
Approach agreed and detailed timetable covering all key project milestone submitted. **Recruitment for qualitative projects, set-up for quantitative projects** to commence	15 working days after project brief received
Fieldwork commences (details below of updates and outputs provided during fieldwork)	20 working days after project brief received

Topline findings	5 working days after fieldwork has been completed
Report provided to DWP (e.g. a PowerPoint report as a standalone document to present at the debrief or a Word report suitable for publication on gov.uk)	35 working days after project brief received
Full and final results in the DWP reporting template including outcomes and recommendations (suitable for publication on gov.uk)	10-20 working days after completion of research
Invoice submitted (including detailed breakdown of expenditure against rate card)	10 working days after final outputs are signed off

In addition to this Ipsos MORI will provide:
- Weekly written updates showing progress against the project timetable, including quotas achieved, and flagging any emerging issues in the data
- For quantitative projects:
  - Daily progress reports whilst a survey is in field (if required)
  - Interim findings, for early insight of key themes during fieldwork
  - Data tables in Excel/PDF breaking down findings by subgroups and SPSS for further analysis (if required) 10 days after the close of fieldwork
- For qualitative projects: Topline findings in Word during fieldwork, covering emerging findings, for discussion with the DWP project team
- Monthly written update of expenditure on the contract to date against the rate cards by the 10th of every month

Ipsos MORI will work to support the full range of DWP teams - providing clear information and timetables to work towards, detailing what Ipsos MORI require, managing expectations and working to guide them throughout the process. It also means Ipsos MORI need to be flexible and build good relationships by being open and cooperative both during and between projects. In the DWP pension communications call-off contract, Ipsos MORI have consistently proven our strength in developing relationships and in supporting clients to get the most from the research. For instance, a recent project into the State Pension Letter Testing was delayed due to changes in the Ministerial team: The Ipsos MORI team stayed in contact with the DWP project team, ensured that the research got underway as soon as possible and gave clear findings in time to inform the design of the final letter. Key to delivery of this project was the team's ability to respond flexibly to the changing circumstances, open communication with DWP and co-operation between DWP and Ipsos MORI to ensure the deadlines were met.

From experience, call-off contracts of this type particularly benefit from close working relationships between researchers and those commissioning and Ipsos MORI strive to maintain good relationships. To facilitate this, Ipsos MORI suggest holding regular face-to-face contract meetings during and between projects, as well as ad hoc telephone calls. Ipsos MORI would encourage DWP to visit or accompany during the research process and to 'get involved' as much as is able (e.g. analysis sessions). Ipsos MORI would welcome opportunities to discuss issues with DWP informally as the research proceeds and also to provide feedback throughout the fieldwork and analysis periods. As with the DWP pension's communications call-off contract, would also be keen to enhance joint working through cross-team debrief sessions and knowledge-sharing presentations of relevant Ipsos MORI research, as well as potential on-site working with HMRC, so the research team can bring instant research knowledge and suggestions into your internal planning meetings. Ipsos MORI would also be happy to host any DWP internal meetings, such as away days for no additional charge.

Ipsos MORI systematically monitor client satisfaction with all our projects via our Client Satisfaction Monitor system. A questionnaire would be sent to the DWP team contact at the end of each research project for feedback and comment. This feedback is sent direct to our internal business excellence team and any rating below "very good" is passed on to the relevant Head of Division for consideration and potential further action. This provides an opportunity for client teams to open dialogue with senior staff within Ipsos MORI away from the core project team. As mentioned above, the project team would conduct a post-project review following the completion of a project to identify areas of good practice and learnings for future projects commissioned as part of the call-off.

Quality

Ipsos MORI is accredited to ISO 9001:2000 (which superseded ISO 9002), ISO 20252 and BS 791111. Ipsos MORI also became one of the first two companies to achieve accreditation under the Market Research Quality Standards Association (MRQSA), now BS7911. This sets out minimum standards for each stage of a market research project and is designed to enable accredited companies to provide a superior service to their clients. Ipsos MORI was also the first UK Market Research company to achieve the new international standard in research project management, ISO20252. However, Ipsos MORI regard their various standards as minimum requirements rather than goals in their own right, and Ipsos MORI are active in searching for on-going quality improvements. Consequently, in addition to the regular surveillance visits carried out by external bodies in connection with IQCS, ISO and MRQSA, Ipsos MORI have internal auditing and quality teams. With the help of feedback from our clients, the teams continuously monitor the quality of service Ipsos MORI provide.

For projects under this call-off, Ipsos MORI would implement standard procedures to ensure Ipsos MORI deliver a high quality service, such as monitoring at least 10% of interviews (including interviewer manner and data entry), only using interviewers that have passed our rigorous selection and training programme (including attending a Training Assessment Day and on-the-job training from Supervisors), systematic and meticulous script checking, incorporating range of soft and hard checks and outputs checked and signed-off by the Project Director.

Data Security

Ipsos MORI has a stringent set of security policies and procedures ensuring the safekeeping of all data Ipsos MORI handle and analyse. This includes an integrated quality, compliance and information security management system, "Business Excellence System", certified to the international standards for quality (ISO 9001), market research services (ISO 20252) and information security (ISO 27001). Ipsos MORI continually review these policies and procedures to improve data protection performance. All staff receive training in data handling and management, including the correct application and transmission of passwords, setting up of access and permissions, encryption, and secure transfer of data. Ipsos MORI require all staff members, freelancers and sub-contractors to sign a confidentiality agreement and can send a copy of these declarations to you.

Ipsos MORI are compliant with DWP Data Security policy, possess current Generic Security Accreditation Documents (GSAD) and comply with Security Assurance for Research & Analysis (SARA) Risk Template on data transfer. Survey data will have no identifiable information, sample files are stored in password-protected job directory and data destroyed one month after fieldwork. Any data security breach immediately reported to our Head of Compliance who will work with DWP to develop an appropriate and timely response.

Complaint Resolution

REDACTED

Risk Management

Conducting thorough and regular appraisals of potential risks is a key part of our approach to project management. Below Ipsos MORI outline some of the risks inherent in this type of contract and how Ipsos MORI would address them.

Issue	Mitigation strategy
Dealing with and escalating complaints from participants	▪ Minimise complaints by ensuring respondents are informed about research purpose, provide interviewers/ recruiters FAQs (including contact details of team) and conduct thorough interviewer briefings ▪ Where complaints do occur, Ipsos MORI have procedures for logging/resolving: all complaints are allocated an owner and logged (including details about follow-up action); where a complaint against an interviewer is upheld, they are informed in writing and any action documented (ranging from extra coaching/supervision to dismissal); Ipsos MORI write to the individual who complained to confirm actions undertaken; keep DWP aware of any complaints and how they are being managed
Flexibility to accommodate changing requirements	▪ Tailor the team to specific requirements/draw on wider resources as needed ▪ Internal capacity means Ipsos MORI can respond swiftly to requests (e.g. 200 researchers, in-house face-to-face/telephone field team, UK's largest online panel) ▪ Experience of working flexibly (e.g. UC Test and Learn Evaluation re-designed in response to lower claimant volumes/DWP's changing priorities; accommodating meeting requests within 24 hours in the DWP pension communications call-off) ▪ Regularly attend meetings with DWP, including briefings with the Secretary of State at short notice on pensions communications call-off
Capacity to resource multiple projects	▪ Included core team qualitative and quantitative researchers, with ability to draw on c. 200 researchers/specialist teams across SRI ▪ Demonstrated ability to manage multiple concurrent studies on DWP pension communications call-off (won from an incumbent in 2013, retained in 2015) and HMRC call-off contract (awarded the qualitative contract in 2014, retained in 2016 alongside being awarded the quantitative contract) ▪ Contract led by Management Board member with authority to move people/resources quickly
Meeting deadlines	▪ Experienced in working within tight timescales through similar call-offs/quick turnaround polls ▪ Provide detailed timetable for each study, including sufficient time for DWP to review materials/outputs ▪ Major issues affecting the project would be reported to DWP on the same day ▪ Provision of daily/weekly progress updates to keep DWP informed of developments/any potential issues

Recruiting research participants	- Internal recruitment team with extensive experience of hard-to-reach groups (e.g. long-term health conditions, lone parents) - Emphasise our status as an independent research agency to respondents - Reassurances on confidentiality	
Ethical issues	- Staff adhere to MRS Code of Conduct/attend research ethics training - Interviewers trained to be impartial during interviews, record responses accurately and not give personal opinions/ interpretation of questions - Thorough briefing prior to fieldwork - If necessary specialist training provided (e.g. disability awareness training for Right to Control Evaluation for ODI/DWP) - Provide interviewers with contact information for advice services to give to respondents if required (e.g. Citizens Advice Bureau, Money Advice Service, National Debtline) - Very experienced interviewers are used in research with particularly vulnerable respondents - When recruiting Ipsos MORI do not reveal any information about the survey until Ipsos MORI are speaking to the named respondent (other people living in the household may not be aware they have any dealings with DWP) - Provide information, instructions, training and supervision to work safely and effectively (including personal safety training courses by the Suzy Lamplugh Trust) - Complete an ethical risk assessment prior to each project (involving our internal ethics committee)	
Findings not addressing objectives/ report not of publishable standard	- Close contact with DWP ensuring Ipsos MORI design the research to meet your objectives/reporting requirements - Agree all reporting/presentation structures in advance - Reports are written to a publishable standard in plain English/Quality Assured by the Project Director	
Issue escalation and resolution for DWP	REDACTED Issue would be resolved within 5 working days	
Quality issues	- Accredited to ISO 9001:2000, ISO20252, BS791111 - Internal auditing and quality teams to continuously monitor service quality - At least 10% of interviews monitored, including manner and data entry - Only use interviewers that have passed our rigorous selection and training programme	

	▪ Script checking, incorporating range of soft and hard checks
	▪ Outputs checked and signed-off by Project Director
Loss of DWP data	▪ Compliant with DWP Data Security policy, possess GSAD and comply with SARA Risk Template on data transfer
	▪ Survey data with no identifiable information
	▪ Sample files stored in password-protected job directory/data destroyed one month after fieldwork
	▪ Any data security breach immediately reported to our Head of Compliance
Continual improvement throughout contract	▪ Ashley Ames would attend regular account management and project-specific meetings with DWP and liaise on ad-hoc basis
	▪ Conduct a post-project review following the completion of each project
	▪ Systematically monitor client satisfaction via our CSM system

Added value

Ipsos MORI feel there are three key areas where Ipsos MORI will bring added value which will have tangible benefits to DWP.

Policy expertise and working knowledge of DWP. Extensive track record working with DWP and others across a broad range of relevant policy areas means Ipsos MORI can hit the ground running and bring existing knowledge and insight to individual projects. This expertise is built on practical experience among a diverse range of customer and claimant groups – Ipsos MORI have successfully delivered projects on the State Pension (including State Pension top-up and age increases); Automatic Enrolment; Personal Independence Payment; Disability Living Allowance; Employment Support Allowance; Jobseekers Allowance; and Universal Credit for DWP.

A tailored team of specialists. Research for this Framework would be managed by a core team drawn from both our Employment, Welfare and Skills and Social Change Communications Unit to provide the blend of expertise in communications research and in-depth knowledge of DWP policies and audiences.

There would be a dedicated account team working on projects commissioned under this Framework REDACTED

Partnership ethos and additional services. Close partnership working will play a critical role in the success of this contract and Ipsos MORI are extremely keen to work closely with the relevant DWP teams to make this a success. Ipsos MORI have a range of techniques and services which Ipsos MORI feel will ensure you obtain maximum value from the contract:

▪ Attending DWP team meetings where appropriate: this will be an efficient and effective way for us to understand the environment within which relevant teams are operating and understand any short or longer term aspirations and challenges.
▪ Lunch and Learns: these are informal sessions, jointly decided upon and run, to bring the DWP and Ipsos MORI teams together away from day-to-day delivery. Ipsos MORI envisage that topics would range from focusing on specific audiences and bringing together what Ipsos MORI know about what works when communicating to that audience, to discussing innovative approaches such as how

digital research has been used. The idea will be for individuals to present to the group, while allowing significant time for discussion about the implications and how they could apply to DWP communications.

- Monthly update of Ipsos MORI key data sent direct (including an issues index, technology tracker, political monitor and relevant surveys/releases that month).

- Invitations to free Ipsos MORI events. Ipsos MORI run a series of free events covering a range of pertinent issues (e.g. recent events have covered data privacy and digital techniques), as well as one-off events and series of seminars focussed on clients' needs.

- Access to cutting-edge digital techniques and platforms, with the potential for no-cost experiments. Ipsos MORI also have the ability to implement innovative and cost-effective solutions:
  - live testing digital communications by comparing online test and control groups
  - social listening tools to analyse social media
  - triggering SMS surveys based on location
  - tracking eye movements, e.g. food labels and on-screen advertisements
  - facial coding and implicit reaction tests used within campaign testing and impact evaluation
  - fast-turnaround surveys (within 24 hours) using Ipsos Instant

- Access to omnibus resources; having omnibus capabilities in-house means Ipsos MORI can have priority placement and rates (compared to external buyers of omnibus services).

- International resources. Ipsos MORI have presence in over 85 countries and can provide research across national boundaries without having to sub-contract.

Ipsos MORI offer a core team of researchers from the EWS team and the Qualitative Social Research unit which spans across research grade, meaning it is possible to have multiple teams managing projects simultaneously (including different directors where required). We are also able to draw on a flexible resource of around 170 social researchers across the company which means we can draw on staff at short notice. All projects would be led and managed by members of the core team to ensure consistency for the DWP project team and cross-project learnings.

The capacity of Ipsos MORI enables them to respond to urgent and changing requirements as we are able to put project teams in place at short notice. Ashley Ames, Director for this contract sits on the Public Affairs management board and has oversight for resourcing which allows him to move resources on to projects at short notice. This capacity is enhanced by the flexibility of our research team and their desire to deliver high quality research findings. Under our existing Pensions communications contract we regularly provide DWP with support at short notice, for instance checking findings prior to publication.

Ipsos MORI are also able to respond flexibly to changing circumstances to ensure that the project is delivered to a high standard.

Our capacity and ability to call upon a number of team members who are experienced at delivering outputs for DWP will mean that we are able to meet the volume and quality requirements of this contract.

(1.2) Commencement Date: 20th January 2017

(1.3) Price Payable by Authority

As per the Supplier's proposal of: 7th October 2016

REDACTED

(1.4) Completion Date: 09th January 2019 (2 + 1) **Extension end:** 09th January 2020

2 ADDITIONAL REQUIREMENTS

(2.1) Supplemental Requirements in addition to Call-Off Terms and Conditions:

Non Applicable.

(2.2) Variations to Call-Off Terms and Conditions

Non Applicable.

3. PERFORMANCE OF THE SERVICES [AND DELIVERABLES]

(3.1) Key Personnel of the Provider to be involved in the Services [and deliverables]:
REDACTED

(3.2) Performance Standards

The Authority will measure the quality of the Ipsos MORI's delivery by:

KPI/SLA	Service Area	KPI/SLA description	Target
1	Service Delivery	The Supplier will be open and cooperative in their relationship with the Authority, and flexible in response to changing Departmental requirements	100%
2	Service Delivery	The Supplier will respond to written briefs for Call-Off requests within 5 working days. The response must include costed proposals	95%

3	Service Delivery	The Supplier will adhere to the timescales/ project plans unless otherwise agreed by the Authority	98%	
4	Service Delivery	The Supplier will ensure that all of the services delivered address the requirements in the brief	100%	
5	Service Delivery	The Supplier will provide the Authority with daily progress reports while a survey is in field unless otherwise agreed by the Authority.	98%	
6	Account Management	The Supplier will acknowledge complaints and issues raised by the Authority and respond to phone calls and emails within 24 hours.	100%	
7	Account Management	Complaints and issues will be managed and resolved during the term of the contract within 5 working days unless otherwise agreed by the Authority	100%	
8	Account Management	Complaints and issues will be escalated to the Authority's representative through the agreed escalation route	100%	
10	Account Management	The Supplier with provide MI including a breakdown of expenditure against the rate cards in Appendix E – Price Schedule monthly within 10 working days of the last day of the previous month, unless otherwise agreed by the Authority	100%	
11	Service Delivery	The Supplier will provide a written report of the project outcomes and recommendations within 20 days, unless otherwise agreed by the Authority	100%	

Performance is to be reviewed every 2 months between the Supplier and Authority to ensure maximum value is being derived by the Authority.

The Authority will provide the Supplier one months' notice to improve on failings and a further one months' notice should the service be unsatisfactory.

The Authority expects the Supplier to maintain effective disaster recovery and business continuity plans to maintain communication with the Authority and secure minimum disruption to services.

(3.2b) Key Milestones

The Potential Provider should note the following project milestones that the Authority will measure the quality of delivery against:

Milestone	Description	Timeframe of Initial Requirement	Call-Off Requirements
1	Meet with supplier and brief them on initial research project	Within week 1 of Contract Award	5 working days
2	Outline approach for research from supplier	Within week 2 of Contract Award	10 working days
3	Approach agreed, plan put in place for future milestones and work commences on recruitment for sessions	Within week 3 of Contract Award	15 working days
4	Commence research and provide report which will be presented to the Authority by supplier	Within week 4 – 7 weeks of Contract Award	20 – 35 working days
5	Submit Invoice to the Authority representative a detailed breakdown of expenditure against the rate cards	Within 10 days of completion of work.	Within10 working days of completion of the work

(3.3) Location(s) at which the Services are to be provided:

As per section 1.1, various locations in order to carry out wide demographic research

(3.4) Quality Standards

The supplier will adhere to the Framework quality standards, as referred to in section B1-3-2 of the Framework agreement and with all standards stated within their tender , section 5.2 Account Management, supplemented below:

Ipsos MORI is accredited to ISO 9001:2000 (which superseded ISO 9002), ISO 20252 and BS 791111. Ipsos MORI became one of the first two companies to achieve accreditation under the Market Research Quality Standards Association (MRQSA), now BS7911. This sets out minimum standards for each stage of a market research project and is designed to enable accredited companies to provide a superior service to their clients.

Ipsos MORI was also the first UK Market Research company to achieve the new international standard in research project management, ISO20252.

However, Ipsos MORI regard their various standards as minimum requirements rather than goals in their own right, and are active in searching for on-going quality improvements.

Consequently, in addition to the regular surveillance visits carried out by external bodies in connection with IQCS, ISO and MRQSA, we have our own auditing and quality teams. With the help of feedback from our clients, the teams continuously monitor the quality of service we provide.

For projects under this call-off, Ipsos MORI would implement standard procedures to ensure we deliver a high quality service, such as monitoring at least 10% of interviews (including interviewer manner and data

entry), only using interviewers that have passed our rigorous selection and training programme (including attending a Training Assessment Day and on-the-job training from Supervisors), systematic and meticulous script checking, incorporating range of soft and hard checks and outputs checked and signed-off by the Project Director.

(3.5) Contract Monitoring Arrangements

As per section 1.1

4. CONFIDENTIAL INFORMATION

(4.1) The following information shall be deemed Commercially Sensitive Information or Confidential Information: -

REDACTED

BY SIGNING AND RETURNING THIS ORDER FORM THE PROVIDER AGREES to enter a legally binding contract with the Authority to provide the Service specified in this Order Form together with, where completed and applicable, the mini-competition order (additional requirements) set out in section 2 of this Order Form. Incorporating the rights and obligations in the Call-Off Terms and Conditions set out in the Framework Agreement entered into by the Provider and UK SBS and any subsequent signed variations to the terms and conditions.

For and on behalf of the Provider: -

Name and Title	REDACTED
Signature	REDACTED
Date	REDACTED

For and on behalf of the Authority-

Name and Title	REDACTED
Signature	REDACTED
Date	REDACTED