

### Defra Group Management Consultancy Framework: Project Engagement Letter

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

Engagement details		
Engagement ref #	DPEL_61547_020	
Extension?	No	DPEL Ref. N/A
Business Area	Animal and Plant Health Agency (“APHA”)	
Programme / Project	Avian Influenza Outbreak	
Senior Responsible Officer	[REDACTED]	
Supplier	Deloitte LLP (“Deloitte”)	
Title	People Planner Delivery	
Short description	Supplier will provide the resources stated in this Engagement Letter to APHA to support the Avian Influenza Outbreak response covering resource planning and management information support. As the outbreak as continued this support is still required	
Summary of change	N/A	
Engagement start / end date	19/06/2023	15/11/2023
Funding source (CDEL/RDEL)	RDEL	
Consultancy Spend approval reference	N/A	
Expected costs 2023	£615,706 excluding VAT and expenses	
Dept. PO reference	TBD	
Lot #	TBD	
Version #	2.0	

### Approval of Project Engagement Letter

By signing and returning this cover note, APHA accepts the contents of this Project Engagement Letter as being the services required and agrees for Deloitte to provide the services in accordance with the agreed Supplier Proposal under the overarching contract (Lot





The People Planner tool was originally built to track employee availability to support in the AI outbreak response. APHA is seeking to re-build the tool to better meet the needs of the agency.

## 2. Statement of services

### Objectives and outcomes to be achieved

Supplier will provide resources for June 19<sup>th</sup>, 2023 to November 15<sup>th</sup>, 2023. Given the Business Unit's resourcing vision of managing staff resources efficiently to enable the agency to respond rapidly to shifting national priorities, scaling up and down at pace, and having a clear picture of staff skills and allocation across the organisation, this engagement will help achieve the following **objectives**:

- **Flexibility:** Building flexibility into ways of working to respond more quickly to emerging threats and shifting responsibilities.
- **Prioritisation:** Prioritising work more effectively, to better decide how to allocate limited resources to competing priorities.
- **Single source of truth:** Working to develop a unified and Agency-wide view of where staff are and what they are doing.
- **National approach:** Thinking nationally about work and sharing resources and knowledge beyond local hubs and offices.
- **Data driven:** Making data-driven decisions on resources, increasing visibility and status of resources across directorates
- **Accountability:** Encouraging individual and manager accountability for accuracy of availability forecasting.

The next phase of development of People Planner will provide the following value and **outcomes**:

	Value-Add	Outcome	Current or New Feature?
1	Future-looking tracker of employee availability to make strategic forecasted deployments	Increased <b>reactivity and accuracy</b> when planning resource allocation for all priority-level activities	Current feature, will be significantly enhanced
2	Resource reporting based on competency, specialty, allocation, and availability data	Management will make <b>data-driven</b> resourcing decisions and assessments	Current feature, will be significantly enhanced
3	Repository of trackable competencies, including competency level and currency, for each directorate against predicted demand	Management will have a holistic view of team competencies, allowing the <b>detection of training and recruitment</b> needs as needed	New feature
4	Forecasted deployments of resources against predicted demand	All Data accuracy will be strengthened and removes need for local trackers/spreadsheets	New feature

To support the realisation of these outcomes, Deloitte will provide the following services:

**1) Functional & Design Elaboration of People Planner**

- a) Detail, refine, and prioritise user stories (functional and non-functional) in the backlog alongside the DDTS development team and work closely with the Business Area to capture all required details in the user stories
- b) Capture required field data and reference data for the tool
- c) Provide front-end UX designs, which includes the relevant interfaces and interactions necessary to the DDTS team to deliver the agreed scope of user stories sprint-by-sprint
- d) Refine the product roadmap and vision to remain relevant throughout the delivery period, as necessary

**2) Engagement Delivery Management**

- a) Plan and run all relevant Agile ceremonies such as sprint planning, stand up, retrospectives and sprint demos as required
- b) Plan and run each delivery sprint in collaboration with your Product Owner to ensure that ongoing capacity planning is accurate and effective
- c) Provide weekly status reporting on project progress, scheduling and chairing associated review meetings, supporting the Business Area's governance and stakeholder engagement as required
- d) Provide a knowledge transfer plan for functional and design related work

## Scope

Deloitte will provide 5 daily resources to deliver the product, functional, delivery, and design requirements for the new version of the People Planner tool. These detailed requirements will be then passed on to DDTS for development and testing.

## Assumptions and dependencies

- Existing Excel, PowerPoint, SharePoint based tools will continue to be used.
- Work will be undertaken remotely, however travel to APHA offices for workshops will be conducted as required
- Supplier staff will work on APHA laptops
- Supplier staff will work under the Business Area's [REDACTED] supervision and control.
- **DDTS** will be responsible for the following:
  - Estimate and plan the user stories accordingly for the sequence of delivery sprints that form the basis of the main delivery plan
  - Accessibility and quality assurance testing of the functional solution





- Data will be accessible (e.g. SQL database) for the purposes the People Planner reporting functionality (Power BI)
- The People Planner will exclusively include allocation and competency data for Field Delivery/Animal Health for the initial Go-Live date of October 13<sup>th</sup> – the Business Areas can then incorporate additional data from agency Business Units as seen fit
- The Business Area will identify a team of resources to be responsible for People Planner Admin tasks, which will include adding additional allocation and competency data post-Go Live
- The need for data migration from the current iteration of People Planner will be assessed during the engagement and completed as deemed necessary
- The Supplier will commit to refining the Animal Health data to be entered into People Planner for the release date. We will support with refining the data for Plant & Bee, Science, and Vet with the assistance of full time People Planner Admins (2 required) who will support the collection of this data, and engage in proper knowledge transfer with Supplier team so they can confidently update data post-engagement. This means that by the end of the engagement, all data should be gathered and mapped to the defined taxonomy so the Business Area can roll out all field and reference data to the rest of organisation when appropriate without the support of the Supplier. The Supplier will support with user testing after the tool's release in the Hypercare period to ensure all directorates/users will extract the expected amount of value from the tool. The Supplier will ensure there is no loss of functionality to other parts of the business using People Planner.
- UX designs will be provided in a tool agreed upon between DDTS and the Supplier, and will align to appropriate service standards set out by DDTS for internally used products
- The Supplier will assess the technical and business requirements for integrating MyLeave and People Planner

### **AI Outbreak Demand Tool**

- After the time period for testing and review, as stated in the release letter for the AI Outbreak Demand Tool, we will undertake no further development work on the tool, and APHA will have been deemed to have accepted responsibility - if any further development work is required after this time period, this will be treated as a separate request
- The initial set of business rules (logic for how the number of required roles scales with level of outbreak) should be agreed by Friday 9<sup>th</sup> June, however we can provide limited support to change these if required.
- The tool needs to be handed-over to an APHA resource with a suitable background in Python programming and experience in data/analytics. Without such a handover, the tool will not be accessible
- The tool is currently hosted on the Defra Scientific Computing Environment (SCE), however this is a prototyping environment and SCE guidance states that it should not be used for production systems - the tool can currently only be accessed and used by technical users to access to the SCE virtual machine (VM) on which it sits.



- As it is a prototype, the tool has currently not undergone any formal testing process, and all aspects of ‘productionisation’ of the tool are considered out of scope - before the tool can be widely used, it should be taken through a formal process to release it to a production environment (including thorough testing, agreement of support model, etc.)
- During this engagement, or until handover has completed (if sooner), we can provide APHA with outputs from the prototype tool as needed, in .csv format
- APHA retains responsibility for any assumptions, input data and resulting projections in relation to the tool

#### **Outbreak Resourcing Dashboard / Red Cell Rotas**

- When the demand signal changes, I will provide APHA with the updated forecast (number of roles required by role type, team and day). An APHA resource will maintain the FOB rotas, updating red cells, etc.

#### **Detached Duty Rota Reporting**

- There is limited development work remaining to accommodate for changes to how data for Scotland and Wales will be captured (awaiting business decision)
- The report has been built in Power BI and will need to be handed over to a suitable resource from APHA

### **Risk management**

- There is a risk that significant increases in the number of Avian Flu cases prior to October 2023 means that the Client team does not have capacity to support the People Planner functional elaboration process. The Supplier will mitigate this risk by holding regular governance meetings between the Business Area and Supplier team to review agency capacity and agree any adjustments to the People Planner scope as necessary.
- Any form of data model that is delivered or made available to the Business Area, it is made available to the Business Area on condition that they understand and accept that:

The Supplier will discuss and agree the model’s specification with the Business Area and set out its agreed proposed content, form and functionality in a specification document. The Supplier will send you updates and drafts of the model during its development and populate it with the data you require. The Supplier will draft user instructions including key assumptions that have been agreed with the Business Area. Drafts and user instructions should be destroyed once they are superseded by the final version of the model, in order to avoid any confusion over version control.

The Supplier will subject the model to development testing before the final draft version is sent to the Business Area for acceptance testing, and the Supplier recommends that the Business Area carry out its own testing on it, so the agency can verify that it meets requirements. Under the model release process the Business Area will acknowledge that they have completed acceptance testing and accept

responsibility for the model, including its assumptions, input data, outputs and associated documentation. Please note that given the nature of a model, it is not generally possible to test it to verify that it is error-free.

## Deliverables

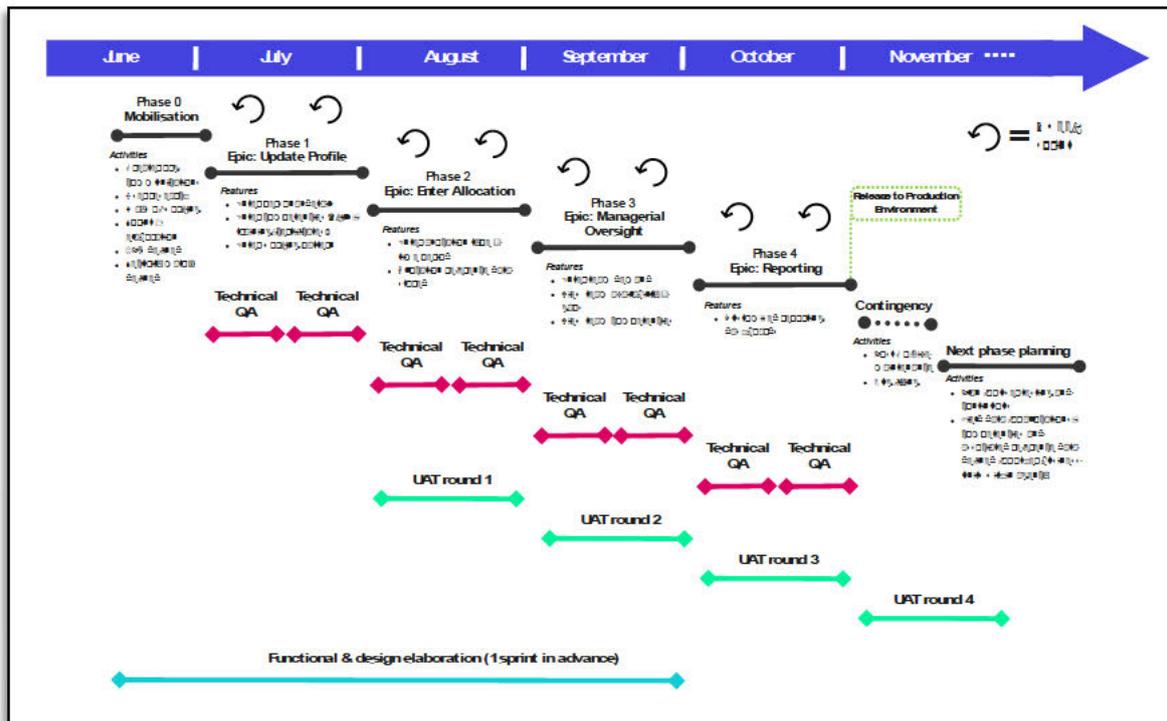
During the course of this Project Engagement, the Supplier expects to provide the following resources to perform the activities as listed below:

Deliverable	Success Criteria*	Milestone / Date	Owner (who in the delivery team?)
Phase 1 – Update Profile Epic	Fully detailed user stories (development-ready), reference data, and high-fidelity screens for desktop and mobile for the following features: <ul style="list-style-type: none"> <li>• Enter personal details</li> <li>• Enter competencies (skills, training, certificates)</li> <li>• Enter working pattern</li> </ul>	July 21 <sup>st</sup> 2023	██████████ ██████████
Phase 2 – Enter Allocation Epic	Fully detailed user stories (development-ready), reference data, and high-fidelity screens for desktop and mobile for the following features: <ul style="list-style-type: none"> <li>• Enter allocation type and time period</li> <li>• Allocation reference data stored</li> </ul>	August 18, 2023	██████████ ██████████
Phase 3 – Managerial Oversight Epic	Fully detailed user stories (development-ready), reference data, and high-fidelity screens for desktop and mobile for the following features: <ul style="list-style-type: none"> <li>• Enter team demand</li> <li>• View team availability and gaps</li> <li>• View team competencies</li> </ul>	September 15, 2023	██████████ ██████████
Phase 4 – Reporting Epic	Fully detailed user stories (development-ready),	October 13, 2023	██████████ ██████████

Deliverable	Success Criteria*	Milestone / Date	Owner (who in the delivery team?)
	reference data, and high-fidelity screens for desktop and mobile for the following feature: <ul style="list-style-type: none"> <li>• Customised reporting dashboards</li> </ul>		
Engagement Delivery Management	<ul style="list-style-type: none"> <li>• Scheduling and running of Agile ceremonies</li> <li>• Regular project governance reports</li> <li>• Regular project governance meetings</li> <li>• Support on business process change management</li> <li>• Provide Knowledge Transfer plan</li> <li>• Business Process Maps</li> </ul>	Throughout	██████████ ██████████

\*Note that features are subject to change based on Product decisions throughout the engagement.

The proposed timeline is as follows:



**Limitations on scope and change control**

Unless instructions to the Supplier are later amended in writing, the work undertaken will be restricted to that as set out in the above Deliverable section. 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**

Name	Role (link to stage/s resource will work on)	Responsible for	Grade	Daily rate	# of days	Cost
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

<p><b>Total resource</b></p> <p style="text-align: center;"><u>Total days*</u> Engagement Length**</p> <p><small>*Total days worked across all resources **Total working days in engagement</small></p>	<p><b>604 / 110 = 5.49</b></p>
---	--------------------------------

**Business Area's team**

- [REDACTED] - Service Delivery Director
- [REDACTED] - Director of Strategy, Planning & Innovation

#### 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 £615,706 excluding VAT.

We propose a monthly service charge to deliver this work, as set out in the table below.

Description	Cost	Due (link to milestone dates) in the Deliverables Table)
<b>Expenses (estimate)</b>		
All work assumed to be undertaken remotely. Any travel outside London to be agreed with Client in advance and charged in alignment with Defra T&S policy	[REDACTED]	Monthly pro rata, as seen below
Service charge for team of 5 people (plus QA/oversight) to develop the functional requirements, UX designs, and delivery management for People Planner. For the duration of this engagement, a pro-rated equal monthly Service Charge shall apply.	[REDACTED]	31/07/2023 31/08/2023 30/09/2023 31/10/2023 31/11/2023
<b>Grand total</b>	£+ expenses	£615,706

#### Expenses statement

Defra Group overarching contract rates include expenses for any travel to/from any UK location defined by the Business Area as the base office for the work. Only expenses for travel at the Business Area's request from this base can be charged. If appropriate, define permissible expenses to be charged.

#### Payment

The Supplier should invoice fees monthly in arrears. Defra Group will reimburse fees monthly on confirmation of approval of work delivered by the Business Area. The Supplier will keep an accurate record of time spent by staff in providing the services and provide this information and supporting narrative, if requested.

#### 5. Governance and reporting

As part of the Call-Off Contract, the Supplier and Business Area agree to provide reporting on the following:

- Completion of the time tracker on a monthly basis, to track days worked by our Deloitte resources.

### Key Performance Indicators

KPI	KPI Requirement	Description	Reporting Frequency	Who Measures	Method of Measurement	Performance Target
1	Phase 1 – Update Profile Epic	Fully detailed user stories (development-ready), reference data, and high-fidelity screens for desktop and mobile for the following features: <ul style="list-style-type: none"> <li>• Enter personal details</li> <li>• Enter competencies (skills, training, certificates)</li> <li>• Enter working pattern</li> </ul>	Weekly	APHA Product Owner	<ul style="list-style-type: none"> <li>• User stories in Azure DevOps</li> <li>• Screens in appropriate design software</li> </ul>	TBD – scope of user stories and designs dependent on DDTS capacity/velocity
2	Phase 2 – Enter Allocation Epic	Fully detailed user stories (development-ready), reference data, and high-fidelity screens for desktop and mobile for the following features: <ul style="list-style-type: none"> <li>• Enter allocation type and time period</li> <li>• Allocation reference data storied</li> </ul>	Weekly	APHA Product Owner	<ul style="list-style-type: none"> <li>• User stories in Azure DevOps</li> <li>• Screens in appropriate design software</li> </ul>	TBD – scope of user stories and designs dependent on DDTS capacity/velocity
3	Phase 3 – Managerial Oversight Epic	Fully detailed user stories (development-ready), reference data, and high-fidelity screens for desktop and mobile for the following features: <ul style="list-style-type: none"> <li>• Enter team demand</li> <li>• View team availability and gaps</li> <li>• View team competencies</li> </ul>	Weekly	APHA Product Owner	<ul style="list-style-type: none"> <li>• User stories in Azure DevOps</li> <li>• Screens in appropriate design software</li> </ul>	TBD – scope of user stories and designs dependent on DDTS capacity/velocity
4	Phase 4 – Reporting Epic	Fully detailed user stories (development-ready), reference data, and high-fidelity screens for desktop and mobile for the following feature: <ul style="list-style-type: none"> <li>• Customised reporting dashboards</li> </ul>	Weekly	APHA Product Owner	<ul style="list-style-type: none"> <li>• User stories in Azure DevOps</li> <li>• Screens in appropriate design software</li> </ul>	TBD – scope of user stories and designs dependent on DDTS capacity/velocity
5	Engagement Delivery Management	<ul style="list-style-type: none"> <li>• Scheduling and running of Agile ceremonies</li> <li>• Regular project governance reports</li> <li>• Regular project governance meetings</li> </ul>	Weekly	APHA project oversight	Completion of governance activities on agreed upon cadence	

### Feedback and satisfaction

Business Area and Supplier to agree regular reporting intervals for the duration of the engagement.

Defra Group reserves the right to hold review meetings during the assignment, discussing what went well, opportunities for improvement on future assignments and similar. This will incorporate any 'Show and Tell' documentation or transferable products that have been produced.

A post-engagement quality review of the engagement will be arranged where the Business Area rates the services provided.

### **Non-disclosure agreements**

The overarching MCF2 framework includes NDAs.

### **6. Exit management**

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

Deloitte is providing 5 daily resources to develop the functional and design deliverables required for the delivery of People Planner. Deloitte will be working in collaboration with DDTS and Business Unit SMEs throughout the engagement.

As the contract comes to an end, Deloitte will work with Business Unit and DDTS colleagues to properly transition all functional, design, and data knowledge to allow the agency to run the product independently.

All artefacts will be produced with the Business Unit and on their IT estate. Instructions will be completed and final deliverables as agreed with the Business Unit will be completed by the November 3<sup>rd</sup>, 2023.

### **Notice period**

The nature of these engagements require that Defra Group have the ability to terminate an engagement with notice. Defra Group's termination rights for this engagement are marked below.

The minimum notice period for termination is 5 working days regardless of engagement duration.

1. Business Area identifies a potential need for delivery support, initiates a conversation with DgC, confirms which approvals are required for an engagement to occur, e.g. Consultancy Governance Board if over £100k or DgC Corporate Services Delivery Board if under £100k.
2. Request Form completed by Business Area and submitted to DgC at:
3. The form is reviewed by the DgC team around which resource route is most appropriate (e.g. Lots 1/2/3) and may request additional information/edits from the Business Area if required.
4. Lot / Supplier is selected and briefed on the request by DgC, then introduced to the requesting Business Area for further discussion and confirmation of work to be delivered
5. A Project Engagement Letter is completed by the Business Area with input from the Supplier (with supporting proposals as appropriate) and then finally agreed between the two parties, including evidence of all required approvals either being in place or being progressed (e.g. PO) and forwarded to the DgC for review by the Consultancy Governance Board (CGB). Approval states are:

Approval state	Definition	Permissions
Full approval	<ul style="list-style-type: none"> <li>▪ DPEL agreed</li> <li>▪ DPEL signed: Supplier, Dept and CO</li> <li>▪ Purchase Order number</li> </ul>	<ul style="list-style-type: none"> <li>▪ Work can start</li> <li>▪ Supplier can invoice for work</li> </ul>

