

**THE SECRETARY OF STATE FOR WORK AND PENSIONS**

**AND**

**[SUPPLIER]**

**TEST AND LEARN DPS**

**Project\_20559**

**Version: 1.0**

**SCHEDULE F2:**

**ORDER FORM TEMPLATE AND CALL-OFF SCHEDULES**

**Part A - Order Form Template**

**Contract Number:** [ ]

**From the ("Buyer "):** The Secretary of State for Work and Pensions, Caxton House,  
Tothill Street, London, SW1H 9NA

**To the ("SUPPLIER")**

**Name:** [ ]

**Registered Address:** [ ]

**Registered Number:** [ ]

**DUNS Number:** [ ]

This Order Form, when completed and executed by both Parties, forms a Call-Off Contract. Completion and execution of a Call-Off Contract may be achieved using an equivalent document or electronic purchase order system. The text below should be copied into any electronic order forms.

**DPS CONTRACT:**

This Order Form is issued in accordance with and subject to the provisions of the Test and Learn DPS Contract with the reference number [Insert] and dated [Day/Month/Year].

**CALL-OFF INCORPORATED TERMS**

The following documents shall be incorporated into this Call-Off Contract. If they conflict, the following order of precedence shall apply:

1. This Order Form other than the Paragraph entitled "Call-Off Tender".
2. The Core Terms (v2.0) and its Annex (Definitions).
3. The following Schedules (each taking equal precedence):
  - C1 (Contract Management v2.0)
  - C2 (DWP Minimum Security Requirements v2.0)
  - The following optional Schedule (where applicable)
  - C3 (Welsh Language Scheme) – [Applicable for CPA9: North Wales]
  - C4 (Staff Transfer)
4. The Call-Off Tender provided that any parts of the Call-Off Tender which offer a better commercial position for the Buyer (as decided by the Buyer) will take precedence over the documents above.

No other terms whether written on the back of, appended to this order, or presented at the time of delivery shall form part of the Call-Off Contract.

## 1. CONTRACT PERIOD

### (1.1) Start Date

*[Insert the date on which the Call-Off Contract is to take effect.]*

### (1.2) Expiry Date

Subject to earlier termination of the Contract in accordance with Clause 14 (Ending the Contract) or any extension under Paragraph 2.6 below, the Call-Off Contract shall expire on 31<sup>st</sup> March 2025.

## 2. SERVICES REQUIREMENTS

### (2.1) Services and Deliverables required

Peer Mentoring for Individuals with a Substance Dependency (as such terms are defined in the Call-Off Specification).

*[Insert Lof]*

The Services and Deliverables are set out in the Call-Off Specification (see Paragraph 2.2 below). A brief summary of some of the requirements set out in the Call-Off Specification is as follows:

Peer Mentoring for Individuals with a Substance Dependency is a voluntary trial that targets individuals with a drug or alcohol dependency. Peer Mentors (as defined in the Call-Off Specification) will use their lived experience of addiction and recovery to inspire, motivate, and support the Mentee (as defined in the Call-Off Specification) to manage their dependency, access appropriate support (including treatment, Universal Credit, housing services) and move towards employment.

The Supplier is required to:

- recruit Peer Mentors with lived experience of drug or alcohol dependency;
- suitably train Peer Mentors in supporting Mentees with complex needs, and ensure that they have a strong working knowledge and relationships with a range of support organisations in the local community;
- implement appropriate structures to manage, supervise and safeguard Peer Mentors and Mentees;
- confirm the potential Mentee's eligibility; deliver the provision in a location which is

## Schedule F2: Order Form and Call-Off Schedules Template v2.0

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<p>accessible to customers from the dedicated Jobcentre offices;</p> <ul style="list-style-type: none"><li>• raise awareness of the Peer Mentoring Trial (as defined in the Call-Off Specification);</li><li>• report timely, accurate and comprehensive management information; and produce and report against an implementation plan.</li></ul>	
<p><b>(2.2) Specification</b></p> <p>The Peer Mentoring for Individuals with a Substance Dependency Specification v1.0 as issued with Invitation to Tender documentation on <b>[Insert date]</b> 2023 via Jaggaer.</p>	
<p><b>(2.3) Categories under which the above Services are being supplied</b></p> <p>T2.2 Peer Support</p>	
<p><b>(2.4) Delivery Premises</b></p>	
<p><b>[Guidance: Include all addresses (including postcodes) of where the Services will be performed.]</b></p>	<p><b>And Buyer Premises (Y)</b></p> <p><b>[Text required]</b></p>
<p><b>(2.5) Supplier's Outline Security Plan</b></p> <p>The Draft Information Security Questionnaire was submitted with the tender response <b>[Insert date]</b>.</p>	
<p><b>(2.6) Special Terms</b></p> <p><u>Implementation Requirements</u></p> <p>See Section 3: Performance Management of the Call-Off Specification, paragraphs 3.1 to 3.2 (Performance Delivery and Expectations).</p> <p><u>Call-off Contract Extension</u></p> <p>The Buyer may extend the term of the Call-Off Contract for up to a further twelve (12) months (the "Extension Period") following the Call-Off Expiry Date set out in Paragraph 1.2 (disregarding any deemed amendment to the Call-Off Expiry Date) by giving the Supplier at least three (3) months' written notice prior to the Call-Off Expiry Date.</p> <p>In the event that the Call-Off Contract is extended the Call-Off Expiry Date (as set out in Paragraph 1.2) will be deemed amended to the last day of the Extension Period.</p> <p><u>Annual Contract Review</u></p> <p>Without prejudice to Schedule C1, annual contract performance reviews will be formally undertaken and documented. The Supplier will be expected to arrange where necessary</p>	

access to any of its delivery locations, including those operated by Subcontractors.

#### Exit Plan

Within twenty (20) Working Days after service of a Termination Notice by either Party or six (6) months prior to the expiry of this Call-Off Contract, the Supplier will submit for the Buyer's approval an Exit Plan (as defined below) in a final form that could be implemented immediately.

For the purposes of this Order Form an "Exit Plan" means a plan which is reasonably satisfactory to the Buyer and sets out as a minimum the following:

- 1.1.1 a detailed description of both the transfer and cessation processes, including a timetable;
- 1.1.2 details of any contracts which will be available for transfer to the Buyer upon the Expiry Date together with any reasonable costs required to effect such transfer;
- 1.1.3 proposals for providing the Buyer copies of all documentation relating to the use and operation of the Service and required for their continued use;
- 1.1.4 proposals for the assignment or novation of all services utilised by the Supplier in connection with the supply of the Services;
- 1.1.5 proposals for the disposal of any redundant Deliverables and materials;
- 1.1.6 how the Supplier will ensure that there is no disruption to or degradation of the Deliverables during the Termination Assistance Period; and
- 1.1.7 any other information or assistance reasonably required by the Buyer.

The Buyer and the Supplier will use their respective reasonable endeavours to agree the contents of the final form of the Exit Plan. If the Parties are unable to agree the contents of the Exit Plan within twenty (20) Working Days of the latest date for its submission, then such Dispute shall be resolved in accordance with the Dispute Resolution Procedure.

#### Exit Requirements following Expiry or Termination

In order to facilitate a smooth and orderly transfer of responsibility on the expiry or termination of the Call-Off Contract, the Supplier undertakes to:

- Comply with the Buyer's reasonable requests in preparing, agreeing and implementing an Exit Plan, setting out the duties and responsibilities of the Supplier and the Buyer, leading up to and covering the expiry or termination of the Call-off Contract.
- Save for any Commercially Sensitive Information, deliver to the Buyer any documents, information, manuals, and data in the possession or control of the Supplier which relate to the performance, monitoring, management and reporting of the Services and destroy securely any data as instructed by the Buyer.
- The Supplier agrees to provide such information and data as is reasonably required

by the Buyer for the purpose of any re-tender or transition process, such information and data to be provided to such timetable or deadlines as the Buyer reasonably requires.

- The Supplier shall ensure that all information and data provided to the Buyer in connection with any re-tender or transition process is accurate and complete in all material respects, to the best of the Supplier's knowledge (having made due enquiry). This requirement shall apply to all the information that may be requested by the Buyer and supplied by the Supplier in connection with the re-tender or transition process.

The Parties agree that for the purposes of this Call-Off Contract, **Controller, Processor, Data Subject, Personal Data, Personal Data Breach, Data Protection Officer** shall take the meaning given in the UK GDPR and the following definitions shall apply (where relevant in substitution for equivalent definitions in the Core Terms):

**Authorised Processing List**

the "Authorised Processing List" set out in this Order Form.

**Data Protection Legislation**

(i) all applicable UK law relating to the processing of personal data and privacy, including but not limited to the UK GDPR, and the Data Protection Act 2018 to the extent that it relates to processing of personal data and privacy; and (ii) (to the extent that it may be applicable) the EU GDPR). The UK GDPR and EU GDPR are defined in section 3 of the Data Protection Act 2018.

**Data Loss Event**

any event that results, or may result, in unauthorised access to Personal Data held by the Processor under this Agreement, and/or actual or potential loss and/or destruction of Personal Data in breach of this Agreement, including any Personal Data Breach.

**Data Protection Impact Assessment**

an assessment by the Controller carried out in accordance with Section 3 of the UK GDPR and sections 64 and 65 of the DPA 2018.

**Data Subject Request**

a request made by, or on behalf of, a Data Subject in accordance with rights granted pursuant to Data Protection Legislation to access their Personal Data.

**DPA 2018**

Data Protection Act 2018.

**Joint Controllers**

takes the meaning given in Article 26 of the UK GDPR.

**Law Enforcement Processing**

processing under Part 3 of the DPA 2018.

**Processor Personnel**

means all directors, officers, employees, agents, consultants and contractors of the Processor and/or of any Sub-Processor engaged in the performance of its obligations under this Agreement

**Protective Measures**

appropriate technical and organisational measures designed to ensure compliance with obligations of the Parties arising under Data Protection Legislation and this Agreement, which may include: pseudonymising and encrypting Personal Data, ensuring confidentiality, integrity, availability and resilience of systems and services, ensuring that availability of and access to Personal Data can be restored in a timely manner after an incident, and regularly assessing and evaluating the effectiveness of the such measures adopted by it including those outlined in Schedule C2 (Minimum Security Requirements).

**Sub-processor**

any third Party appointed to process Personal Data on behalf of that Processor related to this Agreement

**UK GDPR**

the UK General Data Protection Regulation.

Data protection

The Parties agree that, for the purposes of this Call-Off Contract, Clause 18 of the Core Terms shall be deleted and replaced with the following Clause 18 (comprising of Clauses 18.1 to 18.13):

**DATA PROTECTION**

- 18.1 The Parties acknowledge that for the purposes of Data Protection Legislation, the Customer is the Controller and the Supplier is the Processor. The only processing that the Processor is authorised to do is listed in the Authorised Processing List by the Controller and may not be determined by the Processor. The term “processing” and any associated terms are to be read in accordance with Article 4 of the UK GDPR.
- 18.2 The Processor shall notify the Controller immediately if it considers that any of the Controller's instructions infringe Data Protection Legislation.
- 18.3 The Processor shall provide all reasonable assistance to the Controller in the preparation of any Data Protection Impact Assessment prior to commencing any processing. Such assistance may, at the discretion of the Controller, include:
- (a) a systematic description of the envisaged processing operations and the purpose of the processing;
  - (b) an assessment of the necessity and proportionality of the processing operations in relation to the Services;
  - (c) an assessment of the risks to the rights and freedoms of Data Subjects; and
  - (d) the measures envisaged to address the risks, including safeguards, security measures and mechanisms to ensure the protection of Personal Data.
- 18.4 The Processor shall, in relation to any Personal Data processed in connection with its obligations under this Call-off Contract:

- (a) process that Personal Data only in accordance with the Authorised Processing List, unless the Processor is required to do otherwise by Law. If it is so required the Processor shall promptly notify the Controller before processing the Personal Data unless prohibited by Law;
- (b) ensure that it has in place Protective Measures, which are appropriate to protect against a Data Loss Event, which the Controller may reasonably reject. In the event of the Controller reasonably rejecting Protective Measures put in place by the Processor, the Processor must propose alternative Protective Measures to the satisfaction of the Controller. Failure to reject shall not amount to approval by the Controller of the adequacy of the Protective Measures. Protective Measures must take account of the:
  - (i) nature of the data to be protected;
  - (ii) harm that might result from a Data Loss Event;
  - (iii) state of technological development; and
  - (iv) cost of implementing any measures;
- (c) ensure that:
  - (i) the Processor Personnel do not process Personal Data except in accordance with this Call-off Contract (and in particular the Authorised Processing List);
  - (ii) it takes all reasonable steps to ensure the reliability and integrity of any Processor Personnel who have access to the Personal Data and ensure that they:
    - (a) are aware of and comply with the Processor's duties under this clause;
    - (b) are subject to appropriate confidentiality undertakings with the Processor or any Sub-processor;
    - (c) are informed of the confidential nature of the Personal Data and do not publish, disclose or divulge any of the Personal Data to any third Party unless directed in writing to do so by the Controller or as otherwise permitted by this Agreement; and
    - (d) have undergone adequate training in the use, care, protection and handling of Personal Data; and
- (d) not transfer Personal Data outside of the UK unless the prior written consent of the Controller has been obtained and the following conditions are fulfilled:
  - (i) the destination country has been recognised as adequate by the UK government in accordance with Article 45 UK GDPR or section 74 of the DPA 2018;



- (ii) the Controller or the Processor has provided appropriate safeguards in relation to the transfer (whether in accordance with UK GDPR Article 46 or section 75 DPA 2018) as determined by the Controller;
  - (iii) the Data Subject has enforceable rights and effective legal remedies;
  - (iv) the Processor complies with its obligations under Data Protection Legislation by providing an appropriate level of protection to any Personal Data that is transferred (or, if it is not so bound, uses its best endeavours to assist the Controller in meeting its obligations); and
  - (v) the Processor complies with any reasonable instructions notified to it in advance by the Controller with respect to the processing of the Personal Data;
- (e) at the written direction of the Controller, delete or return Personal Data (and any copies of it) to the Controller on termination of the Call-off Contract unless the Processor is required by Law to retain the Personal Data.

18.5 Subject to Clause 18.6, the Processor shall notify the Controller immediately if it:

- (a) receives a Data Subject Request (or purported Data Subject Request);
- (b) receives a request to rectify, block or erase any Personal Data;
- (c) receives any other request, complaint or communication relating to either Party's obligations under Data Protection Legislation;
- (d) receives any communication from the Information Commissioner or any other regulatory authority in connection with Personal Data processed under this Agreement;
- (e) receives a request from any third party for disclosure of Personal Data where compliance with such request is required or purported to be required by Law; or
- (f) becomes aware of a Data Loss Event.

18.6 The Processor's obligation to notify under Clause 18.5 shall include the provision of further information to the Controller, as details become available.

18.7 Taking into account the nature of the processing, the Processor shall provide the Controller with full assistance in relation to either Party's obligations under Data Protection Legislation and any complaint, communication or request made under Clause 18.5 (and insofar as possible within the timescales reasonably required by the Controller) including but not limited to promptly providing:

- (a) the Controller with full details and copies of the complaint, communication or request;

	<ul style="list-style-type: none"><li>(b) such assistance as is reasonably requested by the Controller to enable the Controller to comply with a Data Subject Request within the relevant timescales set out in Data Protection Legislation;</li><li>(c) the Controller, at its request, with any Personal Data it holds in relation to a Data Subject;</li><li>(d) assistance as requested by the Controller following any Data Loss Event;</li><li>(e) assistance as requested by the Controller with respect to any request from the Information Commissioner's Office, or any consultation by the Controller with the Information Commissioner's Office.</li></ul>
18.8	<p>The Processor shall maintain complete and accurate records and information to demonstrate its compliance with this clause. This requirement does not apply where the Processor employs fewer than two-hundred and fifty (250) staff, unless:</p> <ul style="list-style-type: none"><li>(a) the Controller determines that the processing is not occasional;</li><li>(b) the Controller determines the processing includes special categories of data as referred to in Article 9(1) of the UK GDPR or Personal Data relating to criminal convictions and offences referred to in Article 10 of the UK GDPR; or</li><li>(c) the Controller determines that the processing is likely to result in a risk to the rights and freedoms of Data Subjects.</li></ul>
18.9	<p>The Processor shall allow for audits of its Data Processing activity by the Controller or the Controller's designated auditor.</p>
18.10	<p>Each Party shall designate its own data protection officer if required by Data Protection Legislation.</p>
18.11	<p>Before allowing any Sub-processor to process any Personal Data related to this Agreement, the Processor must:</p> <ul style="list-style-type: none"><li>(a) notify the Controller in writing of the intended Sub-processor and processing;</li><li>(b) obtain the written consent of the Controller;</li><li>(c) enter into a written agreement with the Sub-processor which give effect to the terms set out in this Clause 18 such that they apply to the Sub-processor; and</li><li>(d) provide the Controller with such information regarding the Sub-processor as the Controller may reasonably require.</li></ul>
18.12	<p>The Processor shall remain fully liable for all acts or omissions of any of its Sub-processors.</p>
18.13	<p>The Supplier indemnifies and keeps the Buyer indemnified in full from and against all claims, proceedings, actions, damages, loss, penalties, fines, levies, costs and expenses and all loss of profits, business revenue or goodwill (whether direct or indirect) and all consequential or indirect loss howsoever arising out of, in respect</p>

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of or in connection with, any breach by the Supplier or any Supplier Personnel of this Clause 18.
<b>(2.7) Supplier's Business Continuity and Disaster Recovery Plan</b> N/A
<b>(2.8) Disclosure and Barring Service and/or other required vetting checks</b> N/A
<b>(2.9) European Social Fund</b> N/A
<b>(2.10) Call-Off Tender</b> Peer Mentoring for Individuals with a Substance Dependency Call-Off Tender as submitted by the Supplier via Jaggaer on <i>[Insert date and time]</i> .

<b>3. PERFORMANCE OF THE SERVICES AND DELIVERABLES</b>		
<b>(3.1) Performance Requirements</b>  See Section 3: Performance Management of the Call-Off Specification, paragraphs 3.1 to 3.2 (Performance Delivery and Expectations); and paragraph 3.3 (Service Levels).  When providing the Services, the Supplier shall as a minimum ensure that it achieves the following Service Levels:		
<b>Category</b>	<b>Respective Performance Requirement Description including remediation period (if any)</b>	<b>Critical Service Failure where failure to achieve (Y/N)</b>
Performance Management Information	Supplier to provide one hundred (100%) of the specified MI (including nil returns), as specified in paragraphs 3.4, 3.8 – 3.9 of the Call-Off Specification, on the correct template by the fifth working day of each month containing MI for the preceding calendar month.	Y
Mentee Tracker	Supplier to provide one hundred percent (100%) of the specified MI (including nil returns), as specified in paragraphs 3.4 to 3.7 of the Call-Off Specification, on the correct template by the fifth working day of each month containing MI for the preceding calendar month.	N
Initial meeting	Peer Mentor to conduct an initial meeting to decide on eligibility and encourage the Mentee to take part within a maximum of ten (10) Working Days of referral.	N

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Diagnostic Interview	Where the initial meeting results in the Mentee taking part in the Trial (as defined in the Call-Off Specification), the Peer Mentor shall conduct a Diagnostic Interview (as defined in the Call-Off Specification) within a maximum of ten (10) Working Days of the initial meeting.	N
SMART Action Plan	Peer Mentor to create and agree with the Mentee an individualised SMART Action Plan (as defined in the Call-Off Specification) within a maximum of ten (10) Working Days of the Diagnostic Interview taking place. This must be evidenced by electronic or wet confirmation from the Mentee, or other means by agreement with the Buyer.	N
Interventions	Hold a minimum of eight (8) Interventions between the Peer Mentor and the Mentee, with the first four (4) sessions taking place within six (6) weeks of the Mentee starting the provision.	N
Baseline Survey	Peer Mentor to administer the Baseline Survey during the first session with the Mentee.	N
FTE	Supplier to maintain the specified FTE (as set out in Annex C to the Call-Off Specification) of Peer Mentors throughout the Contract Period.	N
If the level of performance of the Supplier of any element of the Services during the Contract Period is a Service Failure which if it occurs would be identified as a Critical Service Failure in the table above, the Buyer shall be entitled to terminate this Call-Off Contract pursuant to Clause 14.4.7.		
<b>(3.2) Performance Monitoring Regime/Management Information</b>  See Section 3: Supplier Management Information of the Call-Off Specification, paragraphs 3.4 to 3.13.		

## 4. PRICE and PAYMENT

### (4.1) Charges payable by the Buyer (excluding VAT), and payment profile:

The Peer Mentoring payment model will have two elements:

- Implementation Costs; and

- Delivery Fee.

### Implementation Costs

The “Implementation Costs” are the Charges payable by the Buyer to the Supplier in line with the Contract Cost Register (as defined in the Call-Off Specification and set out at Annex A to this Order Form) [in respect of each month of the Implementation Period (as defined in the Call-Off Specification)], paid in arrears. The total Implementation Costs will not exceed thirty percent (30%) of the overall total Call-Off Contract value (being the aggregate value of the Charges payable over the Contract Period (disregarding any extension to the Contract Period or Call-Off Expiry Date)) as set out in the Contract Cost Register. The Implementation Costs relate to the cost of the Supplier establishing the Peer Mentoring Service in the relevant CPA by the end of the Implementation Period.

Up to fifty percent (50%) of the Implementation Costs due in any given month within the Implementation Period may be withheld at the Buyer’s discretion, should the Supplier fail to complete all planned activity for that given month. The balance of those Implementation Costs will only be paid to the Supplier once all planned activity for that given month has been completed to the satisfaction of the Buyer. In the event that the Call-Off Contract terminates or expires before the planned activity has been completed to the Buyer’s satisfaction then the withheld Implementation Costs will be retained by the Buyer and the Implementation Costs will be deemed to be reduced by such amount.

### Delivery Fee

The “Delivery Fee” will be the Charges payable by the Buyer to the Supplier in respect of each month, from the day following the end of the Implementation Period to the last day of the Contract Period (both dates inclusive), as set out in the Contract Cost Register. The Delivery Fee will be paid in arrears. The Delivery Fee payable for each month following the Implementation Period will be equal in value and will be calculated as the balance of the overall total Call-Off Contract value (as described above) after having deducted the Implementation Costs, divided by the total number of months following the Implementation Period up to the Expiry Date (disregarding the Extension Period for the purposes of this calculation).

During the Extension Period the Delivery Fee shall continue to be payable at the same monthly amount as was payable prior to the Extension Period.

Twenty percent (20%) of the Delivery Fee due in any given month will be deferred by the Buyer, should the Supplier fail to deliver the specified PMI to the timescales pursuant to Paragraphs 3.4 to 3.8. The balance of those Delivery Fees will only be paid to the Supplier once all PMI for that given month has been received.

### **Implementation Costs**

**[Insert if applicable]**

### **Delivery Fee**

**[Insert]**

**Total Contract Value****[Insert]****(4.2) Invoicing and Payment**

The Supplier shall issue monthly invoices in arrears and forward them to the Buyer as follows:

The Supplier shall submit an invoice, as soon as possible and in any case within five (5) Working Days after:

- a) during the Implementation Period, confirmation from the Buyer that the relevant Implementation activity (during the Implementation Period) has been achieved by the Supplier; and
- b) after the Implementation Period, confirmation from the Buyer that the specified Performance Management Information has been received at the end of the relevant month.

Invoices and Supporting Documentation shall be processed using the Basware web portal. Full guidance and support will be provided.

The Supplier shall include the following detail within an invoice:

- all appropriate references, including the unique purchase order reference number, which will be supplied to the Supplier by the Buyer within ten (10) Working Days of the Call-Off Start Date; and
- during the Implementation Period, a detailed breakdown of the activities completed within this Contract to which the delivered Services relate.

**Purchase to Pay**

Suppliers must be prepared to use electronic purchase to pay (P2P) routes, including Catalogue and eInvoicing. Suppliers must be prepared to work with DWP to set up and test all electronic P2P routes. This may involve creating technical ordering and invoice files, including working with our ERP system service suppliers and systems.

**METHOD OF PAYMENT**

Sort Code: **[Insert]**  
Account Number: **[Insert]**  
Bank: **[Insert]**  
Account Name: **[Insert]**

**5. NOTICES****(5.1) Address for Notices to the Buyer:**

As set out at the top of this Order Form or through Jagger Messaging/FileShare, and;

Notice Contact: **[Insert]**

## 6. DATA PROCESSING

### (6.1) Authorised Processing List

1. This Authorised Processing List shall be completed by the Controller, who may take account of the view of the Processor, however the final decision as to the content of this Schedule shall be with the Controller at its absolute discretion
2. The contact details of the Controller's Data Protection Officer are: **[Insert]**
3. The contact details of the Processor's Data Protection Officer are: **[Insert]**
4. The Processor shall comply with any further written instructions with respect to processing by the Controller.
5. Any such further instructions shall be incorporated into this Schedule.

Description	Details
Identity of the Controller and Processor	The Parties acknowledge that for the purpose of the Data protection Laws, the Buyer is the Controller, and the Supplier is the Processor.
Subject matter of the processing	<p>Peer Mentoring for individuals with a substance dependency. Voluntary provision whereby Peer Mentors use their lived experience to support and inspire Mentees to access the help and support needed to overcome their dependency and move towards or in to work.</p> <p>Diagnostic Interview, SMART Action Plan and Pre/Post Participant Survey completed. Face to face interventions held to progress the SMART Action Plan.</p> <p>Supplier to gather MI to inform the performance management and external evaluation of the Peer Mentoring Trial.</p>
Duration of the processing	<p>Contract start date: <b>[Insert]</b> 2023</p> <p>Contract End Date: 31<sup>st</sup> March 2025</p>
Nature and purposes of the processing	<p>As part of the referral process, the Provider will obtain an individual's contact details. If individuals agree to start the programme, Peer Mentors will collect individuals NINO number from their Work Coach if they are a DWP customer.</p> <p>Other personal details listed below will be obtained by the Peer Mentor when holding the Diagnostic Interview,</p>

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	<p>producing the SMART Action Plan and completing the Pre-Post Participant Surveys. The Provider will securely store and pass this personal information to the Buyer's contracted evaluator to inform the Trial's evaluation.</p> <p>Information about the total number of referrals, starts, initial meetings, diagnostic interviews, SMART action plans, sessions completed, along with anonymised SMART action plans, will also be collected by the Provider and securely shared with the Buyer on a monthly basis for performance management purposes.</p>
Type of Personal Data	<p>The Peer Mentoring programme collects and holds the following data, which includes but is not limited to:</p> <ul style="list-style-type: none"><li>• Participant Details (e.g., full name, phone number, email address, National Insurance number)</li><li>• Participant Characteristics (gender, age, ethnicity, addition type)</li><li>• Other Data Stored (barriers to work, benefit status, employment status and history, offending history, information about participation and outcomes achieved during the programme e.g., number of sessions completed, starts on treatment programmes, starts on employment programmes, readiness to work measures, wellbeing and health measures, substance treatment measures, employment related activity)</li><li>• Output Stored During Customer Journey (correspondence with customer, Buyer and third parties, SMART Action Plans, baseline surveys, marketing materials, cost register, invoices).</li></ul>
Categories of Data Subject	Individuals aged eighteen (18) or over, living within the Contract Package Area, who have a Substance Dependency that is a barrier to the individual obtaining sustained employment.
International transfers and legal gateway	Not applicable. Personal Data must not be transferred outside of the United Kingdom.
Plan for return and destruction of the data once the processing is complete	Details to be provided by the Supplier as part of their draft Exit Plan.

**For and on behalf of the Supplier:****For and on behalf of the Buyer:**



Signature:	<div></div>	Signature:	<div></div>
Name:	<div></div>	Name:	<div></div>
Role:	<div></div>	Role:	<div></div>
Date:	<div></div>	Date:	<div></div>

## Part B

### Call-Off Schedules

#### > C1 (Contract Management v2.0)



C1 - Contract  
Management v2.0.pdf

#### > C2 (Minimum Security Requirements and Plan v2.0)



C2 - Minimum  
Security Requirement

#### UK GDPR – Annex B – Security



UK GDPR - Annex B -  
Security.pdf

#### > C3 (Welsh Language Scheme) – CPA 9 – [North Wales only]

The Buyer has legal and regulatory obligations to verify that the suppliers it works with have a reasonable standard of security in place to protect the Buyer's data and assets. The Buyer is committed to the protection of its information, assets and personnel and expects the same level of commitment from its suppliers (and sub-contractors if applicable). In order to protect the Buyer appropriately, the Buyer has recently reviewed its "Security Supplier Assurance" process and requirements and have made the applicable changes in line with industry good practice.

These changes include but are not limited to:

- Updated 'Security Schedule'.
- The completion of the 'Information Security Questionnaire' as part of the tender submission and annually thereafter.
- Compliance with the Buyer's relevant policies and standards, found at [gov.uk](https://www.gov.uk).
- Compliance to industry good practice such as 'ISO27001' and certification to 'Cyber Essentials'.

Full information about UK GDPR and the Supplier's responsibilities are set out in the attached "UK GDPR – Annex B – Security" document.

## **Contract Cost Register**

The attached revised Contract Cost Register was submitted on 7 December 2022 following the conclusion of financial evaluation clarifications.

*[Insert Contract Cost Register here]*

**Schedule C4 (STAFF TRANSFER)**



Schedule C4 (Staff  
Transfer)