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**Call Off Order Form for Management Consultancy Services**

**Provision of Delivery Partner to Programme CASTLE**

**To**

**Ministry of Defence**

**From**

**Deloitte LLP.**

**Contract Reference CCCC19A85**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

12/08/2013

**FRAMEWORK SCHEDULE 4**

**CALL OFF ORDER FORM AND CALL OFF TERMS**

**PART 1 – CALL OFF ORDER FORM**

**SECTION A**

This Call Off Order Form is issued in accordance with the provisions of the Framework Agreementfor the provision of **RM3745** dated 21st November 2017.

The Supplier agrees to supply the Services specified below on and subject to the terms of this Call Off Contract.

For the avoidance of doubt this Call Off Contract consists of the terms set out in this Call Off Order Form and the Call Off Terms.

|  |  |
| --- | --- |
| **Order Number** | To be confirmed by the customer |
| **From** | Ministry of Defence  **("CUSTOMER")** |
| **To** | Deloitte LLP  **("SUPPLIER")** |

**SECTION B**

**call off contract period**

|  |  |
| --- | --- |
|  | **Commencement Date**: Tuesday 02nd February 2021 |
|  | **Expiry Date**:  End date of Initial Period: Thursday 01st February 2024  End date of Extension Period: Friday 30th January 2026  NB: Any expressed extension provisions beyond the End date of the Initial Period for this contract will be at the sole discretion of the Customer.  Minimum written notice to Supplier in respect of extension: 1 month |

**Services**

|  |  |
| --- | --- |
| **2.1.** | **Services required**:  See Appendix A – Statement of Requirements |

**PROJECT Plan**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **3.1.** | **Project Plan**: Call Off Schedule 4 (Project Plan). The supplier will be a key element of joint Army/supplier delivery teams, each led by an Army team lead. Work on all tasks is already underway and is on-track to meet milestones and deliverables. Some dates have been updated to recognise the delay between tender and contract award.   | **Milestone/Deliverable** | **Description** | **Timeframe or Delivery Date** | | --- | --- | --- | | Annual Workforce Prioritisation - Programme Board authority to proceed | * Plan, develop, and pilot the AWP process. | Aug 2021 | | Annual Workforce Prioritisation – Process integrated into BaU | * Refine, adapt and change as required the AWP process to meet customer needs.. | Apr 2022 | | ATF Focus Groups complete | * Plan, deliver and exploit focus groups with a range of cap-badges and ranks. * Integrate outcomes and findings into communications products. | 2021 and 2022 | | ATF Pilot Study 4 | * Cohort: not fewer than 400. * Identify the desired outcomes of the trial and integrating it into the design of the pilot. * Conduct the pilot study, guided by the project manager. * Map skills and competencies of the pilot cohort onto the ATF Concept, including mapping newly created skills to current training levels, and then mapping all service personnel in the cohort against the newly created skills. | Jun - Aug 21 | | ATF Pilot Study 5 | * Cohort: not fewer than 1,000 * Identify the desired outcomes of the trial and integrating it into the design of the pilot. * Conduct the pilot study, guided by the project manager. * Map skills and competencies of the pilot cohort onto the ATF Concept, including mapping newly created skills to current training levels, and then mapping all service personnel in the cohort against the newly created skills. * Integrate pilot into MVP IT platform. | Dec 2021 | | ATF- Army-wide implementation commences | * Formal implementation of the ATF across the Army commences, having been informed by the previous pilot studies and informed by the outcomes. | Dec 21 | | Full ATF implementation complete | Formal implementation of the ATF across the Army is complete.All Army roles, and all Regular and Reserve personnel are ATF-compliant. | Dec 23 | | Capability Groups Project Plan | Detailed plan for the delivery of the Capability Group Project, including: refined requirements, scope and confirmed governance mechanisms, | NLT Mar 21 | | Capability Groups - Recommendations to the Programme Board for the implementation of capability Groups. | Present refined, costed and modelled options to the PB.A staff paper and presentation will be required. | Dec 21 (subject to refinement of project plan) | |
|

**contract performance**

|  |  |
| --- | --- |
| **4.1.** | **Standards**:  In Clause 11 of the Call of Terms |
| **4.2** | **Service Levels/Service Credits**: The Customer will measure the quality of the Supplier’s delivery by:Supplier performance will be discussed at the Monthly Contract Reviews, but issues with performance may be escalated through the Programme Director.Where the Supplier fails to deliver the required performance, the Customer will raise concerns formally through the Programme Director to the Supplier. The Supplier will be expected to produce a Service Recovery Plan which will then be instigated.Where the Supplier fails to produce a Service Recovery Plan or fails to deliver the agreed Service Recovery Plan to the required standard, the Customer reserves the right to seek early termination of the contract in accordance with the procedures set out in Attachment 5 Call Off Order Form and Terms and Conditions.The same process will be utilised where the Supplier identifies any concerns with delivery or engagement of Service or CS personnel.The following service levels and/or KPIs:  | **KPI/SLA** | **Service Area** | **KPI/SLA description** | **Target** | | --- | --- | --- | --- | | 1 | Delivery Timescales | Delivery of sprint task completion in line with the Key Milestones. | 100% | | 2 | Engagement and Relationship | Supplier engagement with CASTLE personnel and other wider stakeholders will be based on Army Values and Standards.Quality of engagement assessed on feedback from MOD and other wider stakeholders. | By exception through observation and stakeholder feedback | | 3 | Army Talent Framework | Consistency with comparable market solutions. | 100% | | 4 | Knowledge Transfer | Potential Provider to ensure knowledge management and transfer sessions with key staff, measured through assessments and feedback from Programme staff. | Completion of work packages | | 5 | Reporting | Provide monthly update on performance through a dashboard, plus a quarterly written report. | On time delivery | | 6 | Performance against Budget | Report monthly | Acceptable variance limit of 2% | | 7 | Delivery plans | Provide a project plan at the outset of each work package for the suppliers' outputs, and report against it. | 100% | | 8 | Risk management | Develop risk management plans in relation to the supplier’s role within the programme and progress against mitigations | 100% | | 9 | Mobilisation | Deliver in line with suppliers' mobilisation plan. | 100% | | 10 | Cost savings | Design and implement a mechanism for the delivery of cost savings. | 5% of contract value | |
| **4.3** | **Critical Service Level Failure**:  Not applied |
| **4.4** | **Performance Monitoring:**  See section 4.2 |
| **4.5** | **Period for providing Rectification Plan:**  In Clause 39.2.1(a) of the Call Off Terms |

**personnel**

|  |  |
| --- | --- |
| **5.1** | **Key Personnel**:  Customer  **REDACTED**  Supplier  **REDACTED** |
| **5.2** | **Relevant Convictions** (Clause 28.2 of the Call Off Terms):  In Clause 28.2 of the Call Off Terms |

**PAYMENT**

|  |  |
| --- | --- |
| **6.1** | **Call Off Contract Charges** (including any applicable discount(s) and expenses, but excluding VAT):  Call Off Rates:  **REDACTED**  Capped Cost Element:  **REDACTED**  **REDACTED**  The total contract value will therefore not exceed £15,172,041.25 (inclusive of all expenses but exclusive of VAT). A full breakdown of the overall costs for this contract is included below:  **REDACTED**  The contract rates are to remain firm for the full duration of the contract inclusive of all expressed extension options. |
| **6.2** | **Payment terms/profile** (including method of payment e.g. Government Procurement Card (GPC) or BACS): Invoicing should occur monthly in arrears. Payment can only be made following satisfactory delivery of pre-agreed certified products and deliverables.  Before payment can be considered, each invoice must include a detailed elemental breakdown of work completed and the associated costs.  The Contract will be managed using the CP&F system. Supplier access to the system will be required. |
| **6.3** | **Reimbursable Expenses**:  Permitted  The base location of the Services will be carried out at **REDACTED** however there may be a requirement to attend other sites in the UK. All UK T&S must be included in day rates. Overseas T&S must be in accordance with MOD policy and must be agreed in advance with the Customer.  Due to the current workplace restrictions resulting from COVID-19, it is anticipated that the Customer and Supplier will be required to conduct significant amount of working remotely. |

|  |  |
| --- | --- |
| **6.4** | **Customer billing address** (paragraph 7.6 of Call Off Schedule 3 (Call Off Contract Charges, Payment and Invoicing)):  **REDACTED** |
| **6.5** | **Call Off Contract Charges fixed for** (paragraph 8.2 of Schedule 3 (Call Off Contract Charges, Payment and Invoicing)):  Three Call OffContract Years from the Call Off Commencement Date |
| **6.6** | **Supplier periodic assessment of Call Off Contract Charges** (paragraph 9.2 ofCall Off Schedule 3 (Call Off Contract Charges, Payment and Invoicing))will be carried out on:  3 December of each Call Off Contract Year during the Call off Contract Period |
| **6.7** | **Supplier request for increase in the Call Off Contract Charges** (paragraph 10 of Call Off Schedule 3 (Call Off Contract Charges, Payment and Invoicing)):  Not Permitted |

**LIABILITY and insurance**

|  |  |
| --- | --- |
| **7.1** | **Estimated Year 1 Call Off Contract Charges**:  **REDACTED** |
| **7.2** | **Supplier’s limitation of Liability** (Clause 37.2.1 of the Call Off Terms);  In Clause 37.2.1 of the Call Off Terms |
| **7.3** | **Insurance** (Clause 38.3 of the Call Off Terms):  In Clause 38.3 of the Call Off Terms |

**TERMINATION and exit**

|  |  |
| --- | --- |
| **8.1** | **Termination on material Default** (Clause 42.2.1(c) of the Call Off Terms)):  In Clause 42.2.1(c) of the Call Off Terms |
| **8.2** | **Termination without cause notice period** (Clause 42.7.1 of the Call Off Terms):  In Clause 42.7.1 of the Call Off Terms |
| **8.3** | **Undisputed Sums Limit**:  In Clause 43.1.1 of the Call Off Terms |
| **8.4** | **Exit Management:**  Not applied |

**supplier information**

|  |  |
| --- | --- |
| **9.1** | **Supplier's inspection of Sites, Customer Property and Customer Assets:**  Not applied |
| **9.2** | **Commercially Sensitive Information**:  **REDACTED** |

**OTHER CALL OFF REQUIREMENTS**

|  |  |
| --- | --- |
| **10.1** | **Recitals** (in preamble to the Call Off Terms):  Recitals B to E  Recital C - date of issue of the Statement of Requirements:15 July 2020  Recital D - date of receipt of Call Off Tender:19 August 2020 |
| **10.2** | **Call Off Guarantee (Clause 4 of the Call Off Terms):**  Not required |
| **10.3** | **Security**:  Short form security requirementsshall apply |
| **10.4** | **ICT Policy:**  Not applied |
| **10.5** | **Testing**:  Not applied |
| **10.6** | **Business Continuity & Disaster Recovery**:  Not applied  **Disaster Period**:  For the purpose of the definition of “Disaster” in Call Off Schedule 1 (Definitions) the “Disaster Period” shall be N/A |
| **10.7** | NOT USED |
| **10.8** | **Protection of Customer Data** (Clause 35.2.3 of the Call Off Terms):  In Clause 35.2.3 of the Call Off Terms |
| **10.9** | **Notices** (Clause 56.6 of the Call Off Terms):  Customer’s postal address and email address:  **REDACTED**  Supplier’s postal address and email address:  **REDACTED** |
| **10.10** | **Transparency Reports**  Not Applicable |
| **10.11** | **Alternative and/or additional provisions (including any Alternative and/or Additional Clauses under Call Off Schedule 14 and if required, any Customer alternative pricing mechanism):**  AUTHORISATION BY THE CROWN FOR USE OF THIRD PARTY INTELLECTUAL PROPERTY RIGHTS    Notwithstanding any other provisions of the Contract and for the avoidance of doubt, award of the Contract by the Authority and placement of any contract task under it does not constitute an authorisation by the Crown under Sections 55 and 56 of the Patents Act 1977 or Section 12 of the Registered Designs Act 1949. The Contractor acknowledges that any such authorisation by the Authority under its statutory powers must be expressly provided in writing, with reference to the acts authorised and the specific intellectual property involved.  Call Off Schedule 14, Section of the Call Off Terms shall apply. |
| **10.12** | **Call Off Tender**:  See Appendix B – Supplier Tender |
| **10.13** | **Publicity and Branding (Clause 36.3.2 of the Call Off Terms)**  In Clause 36.3.2 of the Call Off Terms |
| **10.14** | **Staff Transfer**  Annex to Call Off Schedule 10, List of Notified Sub-Contractors (Call Off Tender). |
| **10.15** | **Processing Data**  Call Off Schedule 17   * + 1. The contact details of the Customer Data Protection Officer is:   **REDACTED**   * + 1. The contact details of the Suppliers Data Protection Officer is:   **REDACTED**   * + 1. The Processor shall comply with any further written instructions with respect to processing by the Controller.     2. Any such further instructions shall be incorporated into this Schedule.  |  |  | | --- | --- | | **Contract Reference:** | CCCC19A85 | | **Date:** | Friday 29th January 2021 | | **Description Of Authorised Processing** | **Details** | | Identity of the Controller and Processor | The Parties acknowledge that for the purposes of the Data Protection Legislation the Parties are independent controllers of Personal Data under this Framework Agreement. | | Use of Personal Data | Managing the obligations under the Call Off Contract Agreement, including exit management, and other associated activities, | | Duration of the processing | For the duration of the Framework Contract plus 7 years. | | Nature and purposes of the processing |  | | Type of Personal Data | Full name  Workplace address  Workplace Phone Number  Workplace email address  Names  Job Title  Compensation   |  | | --- | | Tenure InformationQualifications or Certifications | | Nationality | | Education & training history | | Previous work history | | Personal Interests | | References and referee details | | Driving license details | | National insurance number | | Bank statements | | Utility bills | | Job title or role | | Job application details | | Start date | | End date & reason for termination | | Contract type | | Compensation data | | Photographic Facial Image | | Biometric data | | Birth certificates | | IP Address | | Details of physical and psychological health or medical condition | | Next of kin & emergency contact details | | Record of absence, time tracking & annual leave | | | Categories of Data Subject | Current personnel  Contractors/Consultants  Customers  Public officers  Suppliers  Website end users | |
| **10.16** | **MOD DEFCONs and DEFFORM**  Call Off Schedule 15  The following MOD DEFCONs form part of this Call Off Contract:   |  |  | | --- | --- | | **DEFCON No** | **Description** | | DEFCON 76 | Contractor’s Personnel at Government Establishments | | DEFCON 530 | Dispute Resolution | | DEFCON 531 | Disclosure of Information | | DEFCON 532B | Protection Of Personal Data | | DEFCON 539 | Transparency | | DEFCON 566 | Change of Control of Contractor | | DEFCON 620 | Contract Change Control Procedures | | DEFCON 625 | Co-operation on Expiry of Contract | | DEFCON 642 | Progression Meetings | | DEFCON 658 | Cyber | | DEFCON 659A | Security | | DEFCON 660 | Official Sensitive Security Requirements | | DEFCON 703 | Intellectual Property Rights – Vesting in the Authority | |

**FORMATION OF CALL OFF CONTRACT**

**BY SIGNING AND RETURNING THIS CALL OFF ORDER FORM (which may be done by electronic means) the Supplier agrees to enter a Call Off Contract with the Customer to provide the Services in accordance with the terms Call Off Order Form and the Call Off Terms.**

**The Parties hereby acknowledge and agree that they have read the Call Off Order Form and the Call Off Terms and by signing below agree to be bound by this Call Off Contract.**

**In accordance with paragraph 7 of Framework Schedule 5 (Call Off Procedure), the Parties hereby acknowledge and agree that this Call Off Contract shall be formed when the Customer acknowledges (which may be done by electronic means) the receipt of the signed copy of the Call Off Order Form from the Supplier within two (2) Working Days from such receipt.**

|  |  |
| --- | --- |
| **For and on behalf of the Supplier:** | |
| Name and Title |  |
| Signature |  |
| Date |  |
| **For and on behalf of the Customer:** | |
| Name and Title |  |
| Signature |  |
| Date |  |

**Appendix A – Statement of Requirements:**



**Statement of Requirements**

**Contract Reference: CCCC19A85 Provision of a Delivery Partner for Programme CASTLE**

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Annexes:

1. CASTLE Blueprint
2. Tranche Plan.
3. Army’s Value and Standards.
4. Army Talent Framework concept report.
5. Capability Groups position paper.

# PURPOSE

## External Delivery Partner to support Programme CASTLE in transforming the Army People System for the Regular and Reserve Force in a Whole Force Defence context that will acquire, develop, employ and retain the diverse talent required in a 21st Century, winning Army.

# Background to requirement/OVERVIEW of requirement

## The CASTLE vision is:

### “The Army will be an adaptive modern force, capable of competing in the Digital Age, to implement attractive, relevant and sustainable career pathways which deliver greater organisational agility and enhance both institutional and individual choice. In so doing, the programme will maximise the opportunities for, and the talent of, the Army’s people so that they are motivated, ready and skilled to prevail in war.”

## CASTLE is a complex transformation programme that is already making widespread changes across today’s Army. The overall design of Tranche 1 has been endorsed by the Army’s senior leadership and is integrated with wider transformation measures across Defence. Hence we seek a partner to deliver and implement the designed changes, not to unpick or to re-design Tranche 1. Indeed we seek a partner who can deliver the full suite of outcomes, whose interests are aligned with the Army, and with whom we will have a working relationship that sustains that alignment.

## Delivery partners will be judged on their delivery of CASTLE outcomes. Regardless of how specific activities are defined and managed, the partner was deliver capability and capacity in three distinct areas:

### **Programme-level.** Leadership, control, coherence and trouble-shooting.

### **Project-level Definition.** Steering projects through difficult decisions in order that projects can be commissioned.

### **Project-level Delivery.** To deliver commissioned projects.

### Partners must also demonstrate the following:

### **Flexibility.** The requirement is not yet fully understood for all aspects of Tranche 1. Our understanding of projects may change over time and it will require processes for agreeing new tasks and changing existing ones.

### **Transparency.** The partner will be working at the heart of the programme. You will help commission and oversee the entire programme, including your own work. We require complete transparency of pricing, approach and performance at all times.

### **Integration.** There is a substantial military and civil service team already in place, with relevant knowledge and skills. You will also use other suppliers in some areas. The partner will work as part of combined teams and we will require suppliers to set out appropriate ways of working and mechanisms for knowledge transfer.

## CASTLE will result in a more agile Army; able to better and more frequently articulate its 'people' requirement and offer greater choice to the organisation and individuals.

## The drivers for change and CASTLE Benefits are set out in the CASTLE Blueprint at Annex A.

## CASTLE is currently the priority Army transformation programme and change initiative.

## CASTLE will deliver changes to the Army People System over three tranches. These are:

### Tranche 1: Building the foundations and momentum for change.

### Tranche 2: Building the system and sustaining momentum.

### Tranche 3: Optimisation and continuous adaptation.

## The Army is likely to provide 37 personnel and the remainder will be provided by the Supplier.

# definitions

| **Expression or Acronym** | **Definition** |
| --- | --- |
| ATF | Army Talent Framework. |
| APS | Army People System. |
| E&C | Engagement and Communication |
| PMO | Programme Management Office |
| AVC | Annual Value Cycle |
| Cap Gps | Capability Groups |
| HoC (+) | Head of Capability (Plus) |
| ToS | Terms of Service |
| CPD | Continuous Professional Development |
| ATMT | Army Talent Management Tool |
| V&R | Value and Reward |
| SoS | Spectrum of Service |
| DAM | Data Analysis and Modelling |
| DC | Decisive Condition |
| DP | Decision Point |
| EME | Early Market Engagement |
| KSE-B | Knowledge, Skills, Experience and Behaviours |
| L&D | Learning and Development |
| T&E | Transparency and Empowerment |
| LoS | Length of Service |
| PQO/S | Professional Qualified Officer/Soldier |
| TACOS | Terms And Conditions Of Service |
| DLOD | Defence Line Of Development |
| AOM | Army Operating Model |
| ATF-A | Army Talent Framework Authority |
| SDSR | Strategic Defence and Security Review |
| PMP | Project Management Plan |
| R2A | Roles, Responsibilities and Accountabilities |
| T&S | Travel and Subsistence |

# scope of requirement

## The CASTLE Tranche Plan is at Annex B, the requirement is to support the delivery of Tranche 1 only, and the continued development of the design for Tranche 2 onwards. To support the Tranche Plan work packages have been separated into general support tasks at the programme level that will be required for the duration of the delivery partner contract and project specific tasks which have specified durations.

## **Flexibility**. Flexibility is required to potentially provide additional personnel within the scope of this requirement through a change control process.

## **Engagement and relationship**. Regardless of the level of employment, collaboration is expected between the Supplier and the Customer and other wider stakeholders. Behaviours must be aligned to the Army’s Value and Standards which can be found at Annex C.

## **What is out of scope**?

### **'Army Talent Management Toolkit' and 'Simplicity & Coherence projects'**. These two Tranche 1 projects fall outside the scope of this Requirement because they do not require external assistance.

### **Delivery of Tranche 2 and 3 projects** are also outside the scope of this requirement, although some design and preparatory activity will be necessary as explained in this document.

### **Digital**. A number of the projects may require digital solutions to realise the full benefits. These will be delivered in-house by the Customer. The Supplier will be required to assist in the development and articulation of digital requirements to support projects, but the Customer will collate, cohere and deliver digital solutions.

### **Data and Modelling**. This will be delivered by a separate Supplier already engaged by the Customer. The modelling is used to inform programme decisions and does not have a dependency or interface with any other work packages. The Delivery partner will have access to this Data and Modelling as appropriate.

# The requirement

## **General support**. The following are the general support work packages:

| **Ser** | **Work Package** | **Ref** | **Requirement** |
| --- | --- | --- | --- |
| 1 | Advice and support to Programme leadership |  | This will support the current programme executive (Senior Responsible Owner, Programme Director and Programme Deputy Director) who provide direction and leadership to the programme.  This body monitor, control and report programme progress, risk, issues, assumptions and dependencies to the Programme Board and Sponsoring Group.  The programme leadership includes the Senior Responsible Owner (Army Major General), Programme Director (Army Brigadier), Deputy Director (Army Colonel) and Head Programme Management Office (Civil Service B2).  The partner will be expected to provide advice and support to the programme leadership by cohering, co-ordinating and delivering to Army standards the following: governance, leadership, resource management, planning, risk and issue management, dependencies, assumptions, and change control. |
| 2 | Engagement and Communications |  | The requirement is for professional skills in communications and product development to advise and support the current team of four personnel to identify and manage stakeholders and run the programme's communications plan.  Engagement and Communications must promote key messages, raise awareness, gain commitment, promote outcomes to maximise benefits, measure effectiveness and garner stakeholder opinions.  The Engagement and Communications team is formed of four military and civil service personnel. |
|  |  | 2.1 | **Plans**.  Advise and support the development and maintenance of communications plans, including but not exclusive to, high level strategic messaging, audience analysis, route to market and the evaluation of products throughout the life of the programme. |
|  |  | 2.2 | **Tools**.  Advise and support the development of stakeholder management tools, mediums and processes for the management of the programme for use with allies, partners across government and industry. |
|  |  | 2.3 | **User groups**.  Advise and support the provision of key user group engagement. |
|  |  | 2.4 | **Internal**.  Advise and support the provision and dissemination of programme internal communications through various channels, including the production of high quality multi-media products. |
|  |  | 2.5 | **External**.  Advise and support the provision and dissemination of programme external communications through various channels. |
|  |  | 2.6 | **Coherence**.  Advise and support the integration and management of enterprise level communications and engagement strategy. Whilst maintaining an oversight of project level communications to ensure a cohered and structured approach. |
| 3 | Programme Management Office |  | This requirement is for specialist capability on a 'call off' basis to advise and support the current team of six personnel who act as a centre of excellence for programme management.  The requirement will be reviewed on a monthly basis.  The PMO's role is to run the Programme level schedule, benefits management, risk, assumption, issue, dependency, opportunities and reporting processes and ensure project staff comply with them.  The PMO monitors the training needs within the programme team and advises on appropriate learning opportunities, including providing coaching.  The PMO is custodian of key programme documents including the mandate, blueprint and programme plan. As an indicator, the current level of external support provided to the PMO is two people. |
|  |  | 3.1 | **Reporting**. Assist in the collation of project level reports on a fortnightly basis to measure, progress against plans and escalate/resolve issues. |
|  |  | 3.2 | **Administer change requests**. Advise and support collation, administration, scrutiny, escalation and arbitration where applicable. |
|  |  | 3.3 | **Maintain registers**. Advise and support the utilisation of routine reports to update programme registers that monitor progress. |
|  |  | 3.4 | **Support and guidance to projects**. Assist in the provision of necessary support to project officers and in the production of guidance documents to ensure project uniformity and understanding. |
|  |  | 3.5 | **Standards of governance**. Advise and assist the introduction and maintenance of governance mechanisms which must be in line and integrated with existing corporate governance (e.g. Risk Management in accordance with Joint Service Publication (JSP) 892). |
|  |  | 3.6 | **Controls**. Advise and assist in the establishment of consistent practices and standards in line with programme governance (e.g. reporting, change control, risks, etc) and disseminate to projects. |
|  |  | 3.8 | **Financial monitoring**. Advise and assist the Programme Manager and Head PMO with programme budget control and maintain status reports on all projects. |
|  |  | 3.9 | **Assurance**. Advise and assist the assure of all programme and project level documentation and practices in line with relevant Defence or industry guidelines. Monitor projects to ensure adherence. |
|  |  | 3.10 | **Information management**. Handle programme information in accordance with Joint Service Publication (JSP) 441 (Information, Knowledge, Digital and Data in Defence). |
|  |  | 3.11 | **Resource management**. Advise and assist the management of resource allocation within the programme, including across projects. Assist in the maintenance of a database of resource skills, location and contact details. Maintain relations with external actors who can supply resources. |
|  |  | 3.12 | **Programme scheduling**. Advise and assist in the design and maintenance of the programme schedule that demonstrates a realisation of the benefits aligned with strategic objectives. |
|  |  | 3.13 | **Benefits management.** Advise and assist the programme in managing its benefits. Liaise with the wider programme team to ensure benefits are measured and progress tracked and forecasted at benefits reviews**.** |
|  |  | 3.14 | Advise and assist in the design of, preparation for and delivery of periodic Tranche Reviews. |
| 4 | Design and Coherence Team |  | The requirement is to advise and assist the current team of three personnel in the design team in maintaining design coherence across the whole programme, and developing and designing the projects to be delivered in tranche 2 and 3.  The Design and Coherence Team must maintain the coherence of Tranche 1 projects during delivery as CASTLE’s context changes within the Army and Defence, and as delivery progresses.  This includes maintaining oversight of all projects to ensure they remain aligned with the overall vision, resolving design conflicts between projects and developing and refining the work packages required to deliver tranche 2 and 3.  This will also include incorporating the outputs of the Tranche 1 projects, setting initial requirements, scoping options and the production of project initiation document. The key projects that must be planned for initiation in tranche 2 are:  Changes to terms of service: **Length of Service (LoS).** LoS policy and processes redesigned and delivered to increase the productive time individuals spend in the Army.**Contemporary Specialists.** Contemporary Specialist Terms and Conditions of Service (TACOS) structure redesigned and delivered to increase the productive time individuals spend in the Army.**Career progression.** Career progression rules harmonised to increase the productive time individuals spend in the Army.**Evaluation and Assessment.** How the Army Evaluates and Assesses performance and potential, exploring the use of other tools such as mentoring and 360 degree. This will require a scoping study to understand the options available.**Continuous Professional Development.** Determine the professional development interventions that will be required to support the ATF and wider learning and development changes.The development, scoping and design of tranche 2 projects will be led by a military project officer with delivery partner support. |
|  |  | 4.1 | **Analysis of Current systems**.  Advise and assist on the detailed analysis of current systems to diagnose problems and identify themes to inform future projects. This should include the integration of the outputs of CASTLE tranche 1 projects and continuous improvement initiatives delivered though BaU. |
|  |  | 4.2 | **Problem Solving.**  Advise and assist the team with solving complex problems,utilising different problem-solving techniques and facilitating stakeholder WGsto generate ideas andnew methods of approaching problems. |
|  |  | 4.3 | **HR Advice.**  Provide advice on HR best practice, how ideas from civilian industry could be applied to the military and the realities/practical implications of delivering different policies. |
|  |  | 4.4 | **Requirements Setting**.  Advise and assist in the synthesis of information from multiple sources to turn the vision into a set of requirements for delivery. |
|  |  | 4.5 | **Commissioning Projects**.  Advise and assist in the development of the plan to deliver the tranche 2 and 3 projects including the generation of Project Initiation Documents. |
|  |  | 4,6 | **Decision Support**.  Assisting with the production of papers and reports for senior leadership to make decisions and/or provide direction and guidance on complex issues. This will be a key requirement for preparing the terms of service project for delivery in tranche 2. |
|  |  | 4.7 | **Blueprint**. Advise and support the maintenance of the programme Blueprint to enable effective decision-making and set direction for delivery activity. |
|  |  | 4.8 | **Coherence**. Advise and support in ensuring coherence of the programme design across the projects and in the context of relevant wider initiatives across Defence. Advise on the resolution of design conflicts between projects. |
|  |  | 4.9 | **Assurance**. Advise and support the review of project designs and delivery activities for consistency with appropriate design practice and with the agreed Blueprint. |
|  |  | 4.10 | **Change Control.**  This requirement will assist the current postholder to manage the change control process |
|  |  | 4.11 | **Stakeholder Engagement**. Advise and the support the development and delivery of stakeholder plans to support the development of tranche 2 and 3 projects. Including engagement with user groups and possible surveys. |
|  |  | 4.12 | **Dependency Management**. Advise and Assist the identification and management of internal and external Programme Dependencies |

## **Tranche 1**. The following are the requirements for Tranche 1 work packages:

| **Ser** | **Work Package** | **Ref** | **Requirement** |
| --- | --- | --- | --- |
| 5 | Army Talent Framework (ATF) |  | The ATF provides the single common language that will define skills in the Army.  The governance of skills in the Army will be provided by the Army Talent Framework-Authority (ATF-A) which will direct and guide the implementation of the ATF in the Army. The ATF-Authority will also oversee the skills to ensure coherence and compliance, providing direction where required  The ATF will provide a common language to articulate the entire span of capability management in the Army; across Future Force Development, Career Management and employment, to Force Generation and operational use.  The ATF will work with Future Force Development to set the Personnel demand signal for people for emergent capability.  The ATF will be used for the Career Management and employment of all Army Regular and Reserve personnel, including the setting of professional and technical standards, the rules and regulations for promotion and advancement, or the different options available for employing someone within a particular capability.  The ATF will be the future language of Force Generation, allowing the Army to articulate the skills and competencies of its forces for 21st Century operations and tasks.  The ATF will be nested in a digital solution which provides the means for individuals, Career Managers and the chain of command to access information.  The guiding principles for the ATF design are simplicity, consistency, accessibility, practicality and its focus on the end-user. Given the demands on the Army from constant competition and inter-state conflict, and the nature of the workforce, the ATF must be simple, sustainable, adaptable and usable.  The role of the delivery partner will be fully integrated into the core of the ATF Project Team and will flex to the point of need as required by the Project Lead. |
|  |  |  | **Current Status**  The ATF design is mature. The Defence Common Capability Architecture provides a consistent taxonomy to use across Defence, and the skills and competency framework is being developed.  The ATF design has been endorsed. The role of the delivery partner is to plan and deliver its implementation across the Army. |
|  |  | 6.1 | **Test Common Capability Architecture (CCA).**  The Defence CCA provides a consistent taxonomy to define professions and roles.  The underpinning Defence CCA infrastructure is to be tested, including validation through Profession sponsors and their Subject Matter Experts. |
|  |  | 6.2 | **ATF Governance**. Design and implement the ATF governance system, nested within the ATF-Authority  Design the enduring elements of governance required, long term, to cohere emergent Army competency and skills frameworks.  Work on behalf of the ATF-Authority to cohere more widely across the Army |
|  |  | 6.3 | **Skill Creation**.  Define, test and refine the standard for new Army skills, to enable ATF policy on skill creation which will then be used to assist/support professions during the ATF’s Implementation. |
|  |  | 6.4 | **Role Profiles**.  Define and test the grouping of new Army skills and map against all current Army roles (c.15, 000), at Role level.  Identify the effect on career management policy for integration with other CASTLE projects.  Reflect dependencies in resulting ATF policy. |
|  |  | 6.5 | **Enabling Processes and Policy**.  Identify and empower Heads of Professions to sponsor functional skills areas, and assure the process.  Review and articulate the implications and priorities for career management. |
|  |  | 6.6 | **Technical Statement of Requirement (SOR)**.  Define the full Technical SOR for ATF delivery and support its development through empowered stakeholders (internal to CASTLE, across Army and including Defence).  The Technical SOR will provide full functionality for individuals, Career Managers and the chain of command, through the ATF Implementation and beyond. Specifically, the Technical SOR will detail the requirement for the digital platform that delivers the ATF and will include detail of the required functionality (from the data storage requirement, how the data interacts and how user groups at various levels within the organisation will be able to interrogate the data in terms of searching and viewing).  Given the nature of the workforce, the Technical SOR will support a solution which is simple, sustainable, adaptable and usable. |
|  |  | 6.7 | **Implementation Plan**.  Define, and following pilot activity, refine the plan and then support ATF implementation across every post and person in the Army.  Delivery will include the creation of Heads of Professions.  Delivery includes the creation of skills in each Profession area, mapping of those skills to current roles, creation of ATF policy to govern its use at the Profession level (includes mapping of all current training) and then implementation across all Army personnel and roles,  Implementation will include the use of a new skills self-assessment tool. |
|  |  | 6.8 | **Engagement and Communications**.  Work with the programme level E&C team to create communications products to support functional areas and units across the Army, as well as products for use with allies, partners across government, and industry.  Support the management of all internal and external stakeholders. |
|  |  | 6.9 | **Case Studies and Pilots.**  Support all ATF case studies and pilots.  Recent examples include Infantry, Defence Support and Cyber case studies, which are testing the mapping of roles to the CCA, identifying issues relating to skills governance and supporting the development of ATF policy.  Support and oversee the Royal Signals skills pilot to inform wider ATF development, ATF future pilots and implementation. Support to the pilot includes creation of skills, mapping of skills to current training and the assessment of SP against the skills.  Planning and implementation of two increasingly large scale pilots in 2021 to inform the Army-wide roll out of the ATF system.  Successful piloting in 2021 will constitute part of the initial implementation which will then be consolidated through the full implementation. |
|  |  | 6.10 | **Role assessments**.  As directed by the ATF project lead, all existing Regular and Reserve roles within the Army will be assessed against the ATF to determine and capture the required skills (KSE-B). |
|  |  | 6.11 | **Individual assessments**.  As directed by the ATF project lead, all Regular and Reserve Army personnel will be assessed against the ATF to determine and capture their current and previous earned skills (KSE-B). |
|  |  | 6.12 | **L&D assessments**.  As directed by the ATF project lead, existing Army-wide L&D interventions assessed and mapped against newly created skills within the ATF, and findings integrated into the design of Tranche 2 Continuous Professional Development Project. |
|  |  | 6.13 | **ATF Policy**.  As directed by the ATF project lead, creation of clear direction and supporting guidance in one ATF policy document, with sections relating to each Profession, for use by individuals and all levels of management across the Army. |
|  |  | 6.14 | **Capability Groups**. Work with colleagues to track and support the development of Capability Groups Project, and to manage the close dependencies between the Cap Groups and ATF Projects. |
|  |  | 6.15 | **Market Comparison.** Supplier to commission independent validation that the Army Talent Framework delivered is as good as or better than comparable market solutions. And that individual, role and L&D assessments areas accurate and comprehensive as comparable market solutions. |
|  |  | 6.16 | **Capability Groups**. Track and support the development of Capability Groups Project. Manage the close dependencies with the ATF Project. |
| 7 | Capability Groups (Cap Gps) |  | Capability Groups project is part of wider Army HQ Change. As the Project is still in the Concept phase, the requirement may change as this phase progresses.  It is envisaged the delivery partner requirement is focussed on the segmentation of the workforce into families of professions aligned by functional skills, with some advise and assistance to the military project officer that will be leading with the wider Army HQ element of the project  Linking into the wider capability development and delivery mechanisms of Army HQ, the project will ensure the Personnel Line of Development is fully integrated into Army processes.  It will be the mechanism through which the demand for, and supply of, the Army's people are set. This will require the Army to redesign how it develops, manages and employs our people based on the functional outputs they deliver, and supported by cap-badges.  It will be dependent on the Army Talent Framework to provide the functional skills framework and will need to support and engage with wider activity in Army HQ to integrate with wider (non-personnel) capability delivery.  It is to be assumed that there may be up to eight Capability Groups. However, the project will progress on the assumption the number of Capability Groups is variable and may change.  The Capability Groups project is likely to incorporate a digital requirement which will be articulated by the Capability Groups project and delivered externally to the project.  The Capability Group project is currently in the concept phase, therefore the requirements outlined below are subject to change. The key requirement for the delivery partner is to assist in developing the concept and plan to turn the vision into reality, and then assist with design and delivery of the Capability Groups.  As an indication of scale Capability Groups could require every role and individual within the Army to mapped to a newly identified and defined Capability Group. |
|  |  | 7.1 | **Project Management Support.** Advise and assist the military project officer in all aspect of project management, to ensure they remain aligned to P3M and the direction issued by the PMO. Including the delivery and subsequent updating of all project level artefacts and the project level maintenance of Project-on-Line. |
|  |  | 7.2 | **Project Governance**.Confirm thedependencies with wider Army HQ work and define the project governance structure to prepare for definition and delivery. |
|  |  | 7.3 | **Identification of underpinning systems and processes.** Identify current systems and processes that support current capbadge and capability structures, through acquire, develop, employ and retain. Identify areas of the current system that may need to change in order to deliver capability groups. |
|  |  | 7.4 | **Integration.** Iteratively integrate the outputs of previous pan-DLoD capability group studies and activity, wider on-going Army HQ workstrands and CASTLE projects eg ATF into the Capability Group concept. |
|  |  | 7.5 | **Define Capability Groups.** Define the functions of capability groups from a workforce segmentation perspective and their relationship with capbadges. |
|  |  | 7.6 | **Structure.** Define and test the composition, role and structure of Capability Groups,, including the management and resources. This should include the management structures and responsibility, authority and accountability of both the Capability group management structures and the Capbadge structures, especially defining the boundaries between the two. The structure must consider sustainability, the optimum mix and size, and overall complexity of different groupings. It must be coherent with the ATF. |
|  |  | 7.7 | **Capability Group Governance.** Develop proposals for the Capability Group governance structure. Develop and deliver terms of reference for the Heads of Capability Groups and their role in developing future and current Workforce requirements. Confirm the dependencies, authorities, hierarchy of command and policy and integration with wider Army HQ capability development and the ATF-A. |
|  |  | 7.8 | **Career Management.** Analyse the impact of capability groups on the current career management system. Develop options and recommendations for the criteria, rules and processes for the management of personnel by capability group rather than capbadge. Once recommendations have been accepted, incorporate into the implementation plan and/or into tranche 2 projects within Programme CASTLE/APC. |
|  |  | 7.9 | **Case Studies/ Pilots and Trials.** Identify suitable candidate areas to test elements of the Capability Group Concept, and develop and deliver case studies, proof of concepts or trials. |
|  |  | 7.10 | **Map roles/posts to Capability Groups**. Map current roles to capability groups, test for sustainability, refine as required and deliver recommendations and outline plans for the segmentation of the workforce. This must be coherent with the ATF framework and can draw on the resources of the CASTLE data modelling team to develop and deliver the options. |
|  |  | 7.11 | **Programme Board Approval**. Present refined, costed and modelled CoAs and recommendations to the Programme Board for an implementation decision. |
|  |  | 7.12 | **Implementation Plan.** Develop, test anddeliver an implementation plan for capability Groups, specifically the segmentation of the workforce into Capability groups, and the associated management structures required to deliver capability groups. The implementation plan must also include a mature change management plan. The change plan must be based on the concept of changing a living structure that must still deliver whilst undergoing change. |
|  |  | 7.13 | **Establish Cap Group Structures.** Establish the structures required to implement Capability Groups. |
|  |  | 7.14 | **Establish Capability Groups**. All roles and functions aligned to a Capability group owner. |
|  |  | 7.16 | **Engagement and Communications**.  Work with the programme level E&C team to create communications products to support functional areas and units across the Army.  Support the management of all internal and external stakeholders. |
| 5 | **Annual Workforce Prioritisation (AWP)** |  | The Annual Workforce Prioritisation project will create an annual and a five yearly process to support the delivery of the Army Command Plan (ACP) and the Strategic Defence and Security Review (SDSR). Creation of these processes will seek to match people resource with priority from a short to medium term perspective.The project requirement is for professional support to advise and assist the military project lead with project management, workforce planning and human resources knowledge.The Annual Workforce Prioritisation project is currently in Project Definition Phase and is led by a single military project officer.At the time of writing, the design and construct of Project Delivery is still uncertain.Support is sought for the following activities:Designing an annual cycle for workforce planning and workforce prioritisation.Designing a medium term (five-yearly) cycle for workforce planning and prioritisationProject managementProject governanceDesigning pilot studiesInteraction with the Programme Board |

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# MANAGEMENT INFORMATION/reporting

## Progress meetings will be held on a weekly basis with the CASTLE Programme Manager / Project Managers to check progress towards milestones and review any issues. A meeting will be held every two weeks with the CASTLE Programme Director/Deputy Programme Director to review progress against the milestones and agree outputs and deliverables for the following period.

# volumes

## As at 1 April 2020 there were approximately 80,000 Regular soldiers and 30,000 Reservists in the Army. Full details for the Army's personnel statistics are included in National Statistics Quarterly Service Personnel Statistics. The reports for 1 April 2020 can be found [here](https://www.gov.uk/government/publications/quarterly-service-personnel-statistics-2020/quarterly-service-personnel-statistics-1-april-2020).

# continuous improvement

## The Supplier will be expected to continually improve the way in which the required Services are to be delivered throughout the Contract duration.

## Changes to the way in which the Services are to be delivered must be brought to the Customer’s attention and agreed prior to any changes being implemented.

# quality

## Outputs shall be delivered in accordance with MOD policies and will be approved by the Programme Team as fit for purpose prior to sign off.

# STAFF AND CUSTOMER SERVICE

## The Supplier shall provide a sufficient level of resource throughout the duration of the Contract in order to consistently deliver a quality service.

## The Supplier’s staff assigned to this requirement shall have the appropriate qualifications and experience to deliver the Contract, including P3M qualifications and experience. The Customer reserves the right to reject an individual if they do not have the required knowledge, skills and experience.

## The Supplier shall ensure that staff understand the Customer’s vision and objectives and will provide excellent customer service to the Customer throughout the duration of the Contract.

## The Supplier will ensure where possible that staff are allocated for at least the first two months of the contract and thereafter that any changes are agreed with the Customer in advance.

# Security and CONFIDENTIALITY requirements

## All Supplier staff should be cleared to Security Checked (SC) level and certification must be provided in advance of arrival to enable access to the MOD system. BPSS clearance may be acceptable if required to enable access to the relevant SQEP for the requirement. This must be agreed on an individual basis in advance.

## The Supplier’s staff will be provided access to MOD systems where required and will need to comply with MOD security instructions (to be provide on arrival).

## The Supplier’s staff may utilise their own IT, noting that this must be in line with MOD security guidelines and the security classifications for handling of material. However, the Customer will arrange access to Army IT systems and process security pass applications. It is the Supplier’s responsibility to supply details of Security Clearances in advance of appointment.

# CONTRACT MANAGEMENT

## Contract review meetings shall be conducted quarterly to review performance including against KPIs. These will be chaired by CASTLE Director or Programme Manager and will include representation from Army Commercial.

## Attendance at Contract Review meetings shall be at the Supplier’s own expense.

**Appendix B – Supplier Tender:**

**REDACTED**