



Department
for Environment
Food & Rural Affairs

Defra Group Management Consultancy Framework: Project Engagement Letter

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



Engagement details			
Engagement ref #	DPEL_61541_104		
Extension?	N	DPEL Ref.	61541_104
Business Area	Portfolio Directorate		
Programme / Project	DDP143 Portfolio Initiation: Service Development		
Senior Responsible Officer	<div></div>		
Supplier	Methods Business and Technology		
Title	Service Design and Development		
Short description	Based on evidence and lessons learned from previous phases and case studies, continue to develop a viable design for an Initiation and Delivery Support Service.		
Engagement start / end date	Proposed start date 20 th November 2023	Proposed end date 2 nd February 2024	
Funding source (CDEL/RDEL)	RDEL		
Consultancy Spend approval reference	Supplied by DgC		
Expected costs 22/23	£0		
Expected costs 23/24	£62,639		
Expected costs 24/25	£0		
Dept. PO reference	Dept. PO reference # (to allow for Defra Group recharge)		
Lot #	Lot 3		
Version #	V1		



Approval of Project Engagement Letter

By signing and returning this cover note, **Defra** accept the contents of this Project Engagement Letter as being the services required and agrees for **Methods** to provide the services in accordance with the agreed Supplier Proposal under the overarching contract [redacted] with Defra Group and confirms the availability of funding to support recharge for the services.

Signatures		
Supplier	Business Area	Defra Group Commercial
[redacted]	[redacted]	[redacted]
Supplier engages with Business Area to complete. Once agreed, Supplier signs front page and sends to Business Area	Business Area signs front page and sends to DgC	On approval, DgC signs and returns copy to Business Area and Supplier

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Supplier contact: [redacted]

Business Area contact: [redacted]

General Instructions

The Engagement Letter describes the services required and provided. When completing the Engagement Letter establish the context, explain why external support is required and distinguish between the objectives, outcomes, scope and deliverables. The rationale behind the costs should be made evident in the Fees section.

The Business Area considerations are guidance notes for the customer to support their evaluation of the Engagement Letter.



1. Background

The Portfolio is developing an Initiation and Delivery Support Service. This is with the aim of developing a delivery-centric platform, through which best-practice standardisation and implementation could be advocated and mandated across DEFRA.

By being a unified entry point for projects and programmes into the Portfolio, it can be the nexus around which diverse Portfolio change initiatives can coalesce, and a clear route for projects and programmes to access Portfolio SMEs.

This would see a drive toward a more delivery-centric and benefits led organisation. In turn, the Service would become a driving force behind enabling our projects and programmes to deliver on time, to budget and achieving the outcomes for DEFRA, the taxpayer, and the environment.

2. Statement of services

Objectives and outcomes to be achieved

The outcomes would be:

- An agreed programme of work and structure to implement the work needed for the successful embedding of the Initiation and Delivery Support Service.
- The increased ability for the Portfolio to articulate the Service, its outcomes and benefits to the organisation.
- Reviewed interim design and resourcing of a Service (ToM options).
- Reviewed Service artefacts.

Scope

The scope is focused around the design and communication of a proposed Service.

High-level Service Design Review: Development of existing user journeys.

Case for change review: Evolution of existing case for change.

Interim Revised Design and Structure: Based on learning from P&BH, concurrent CEFAS work, ToM SMEs and DEFRA client insight.

Service Implementation Plan: To include a workshop with SLT and based on existing dependencies roadmap.

Service Lead Role Profile: Based on lessons learned.



Assumptions and dependencies

Assumptions

- Initial Service assumptions and design are agreed from DPEL_61541_090 and require no rewriting.
- This DPEL makes up part of a series of Service development work, scheduled to conclude in approximately Mar 24. As such, deliverables at the end of this DPEL are an iteration of the Service design based on lessons learned up until this point, rather than a finalised and integrated model.
- Evidence from a CEFAS pilot will be integrated where possible and appropriate.
- That Methods staff will have access to key stakeholders who will engage meaningfully and promptly to provide information to support the outcomes.
- That Methods staff will have access to all key data sources as may be required to support the development of the deliverables and assess progress against the outcomes
- That clear guidance on required formats for product delivery will be provided to Methods staff.
- Methods staff will be given appropriate access to IT systems as may be required for the purposes of extracting relevant information, storing, and managing working documents and for any other legitimate purpose as may be necessary for the length of the contract.
- That all relevant stakeholders will be available as necessary for the purposes of knowledge transfer and the transfer of responsibilities, and that key topics of interest will be identified and communicated to the Methods team for this purpose.
- That there will be a formal review of the DPEL at the half-way point to determine which of the Delivery capabilities have been successfully transferred to the client teams and which services need to continue as determined by joint Defra and Methods Assurance, either as defined or on a reduced scale (**Note only for Knowledge transfer**)

Dependencies

- Transfer of responsibility (of services) is dependent on there being staff in place, with the capabilities to own their particular service and with sufficient time throughout the length of the engagement
- Strong leadership of the business area to ensure capacity and capability is built and staff are receptive to Methods knowledge transfer, coaching and able to undertake activities as required for their role
- Leadership across the programme is aligned in approach and thinking, works in a constructive manner to support the programme as a whole.

Risk management

Two layers of risk management shall be considered during this engagement:

- Risk to the service provided by Methods to the Client. These risks shall be recorded and mitigated by Methods staff and communicated to the named Point of Contact either through the regular governance structure or on an ad-hoc basis should a critical risk be raised.
- Risk to the projects which the Methods team are supporting the Client to deliver will be managed through project level risk processes via the PMO. Mitigations will be jointly developed

Key risks to the service delivery already identified include:



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- Insert Key Risks below.

A Methods Service Delivery level risk register will be produced as part of the SDD which will be shared with DEFRA so that all identified risks can be mitigated/managed appropriately.

Deliverables

Deliverable	Success Criteria	Milestone / Date	Owner (who in the delivery team?)
Service Definition Document	Detailing product descriptions with quality criteria, plan and project governance, once initial engagement is complete. It also contains service description for client communication to wider stakeholders	01/12/2023	DM
High-level Service Design Review	Human centred pathway design that users will take through the service.	15/12/2023	Design Lead
Case for change review	Find and review more detailed delivery performance data, and align delivery effectiveness to meaningful, real world environmental impacts to help state the need for delivery change and the Service	26/01/2024	Design Lead and Business Change Manager
Interim Revised Design and Structure	ToM options with Portfolio Lead to include resources and structure options	26/01/2024	ToM SME
Service Implementation Plan	Formulate an SRO prioritised implementation plan that interlinks cross-Portfolio work into an SLT agreed programme	15/12/2023	Programme Lead & Design Lead
Service Implementation Business Change Plan	Internal to the Portfolio: A plan to create awareness of service aspirations, and how their area will contribute to its success. External from Portfolio: Change Impact Assessment on external Personas, to feed L&D requirements to support implementation. An overview plan to make User Personas aware of Service, benefits, procurement mechanism, and their responsibilities in making the Service viable and embedded (e.g. Investment Committee)	26/01/2024	Business Change Manager
Onboarding Presentation	A Service-client centred presentation that includes: <ul style="list-style-type: none"> - DEFRA structure - Portfolio capabilities - Contact details of services and SMEs - Assurance process - Service background, definition and offers - The process they will go through with the service 	26/01/2024	Design Support
Diagnostic tool/process for identifying a project or programme	A quick and efficient tool to assess whether a referred client is suitable for the Service	26/01/2024	Design Support



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Deliverable	Success Criteria	Milestone / Date	Owner (who in the delivery team?)
Service Lead Role Profile	Based on lessons learned, develop a detailed role profile of the Service Lead	26/01/2024	Programme Lead and Design Lead

Limitations on scope and change control

Unless instructions to the Supplier are later amended in writing and approved by change control, the work undertaken will be restricted to that set out above. In providing the services detailed above, the Supplier will be reliant 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

The SDD will provide further detail of each of the services to be provided.

[Redacted content]			
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TOTAL COST			£62,639
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Total resource		<div></div>
<div><div>Total days*</div><div>Engagement Length**</div></div>		
<div>*Total days worked across all resources</div> <div>**Total working days in engagement</div>		

Business Area’s team

Outline Business Area staff allocated to support delivery team in completing the engagement including names, roles, responsibilities and any dependencies / scope they will deliver.
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4. Fees

Defra Group will reimburse the Supplier for approved work done according to the table below. The total fees for the scope of work detailed in this Engagement Letter will be £62,639, inclusive of expenses and excluding VAT.

Stage	Cost	Due (link to milestone dates)
Checkpoint Review		DD/MM/YY
Progress against the outcomes and deliverables as set out in this DPEL		
DPEL Completion		
Completion of all deliverables and successful outcomes as set out in this DPEL and finalisation of all knowledge transfer activity		
Grand Total	£62,639	

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 consultants;
- The business area, through the principal contact, will work closely and will require a minimum weekly progress report. All new risks to delivery should be reported immediately or as soon practicable

Key Performance Indicators

Business Area and Supplier to agree any specific key performance indicators related to this specific project engagement.

KPI	KPI Requirement	Description	Reporting Frequency	Who Measures	Method of Measurement	Performance Target
1.	Availability of Methods	A named delivery contact or delegate will be available to the client for discussions within and outside of DPEL content during working hours.	Ongoing for duration of DPEL	SRO or delegate, with Methods Assurance	Escalation from client team if expected behaviour is not demonstrated	Measured against DPEL & Methods Lot3 agreement.
2.	Regular checkpoints provided by Methods	Weekly reporting to ascertain delivery progress, key risks/concerns	Weekly	SRO with Methods Assurance	Regular project meetings	Measured against DPEL deliverables.
3	Delivery of agreed deliverables	Baselined plans detail agreed delivery dates. These will not be exceeded above agreed tolerance without agreement between all parties	Weekly	SRO or delegate, with Methods Assurance	Regular project meetings	Measured against DPEL deliverables.



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 [REDACTED] framework include NDAs.

It is expected that this work will be undertaken under the NDA as part of the Defra Consulting Framework. Any additional NDA agreements will need to be assessed and agreed separately.

6. Exit management

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

Knowledge Transfer:

Specific transfer outcomes will be tracked through regular reporting and evaluated through a review of completed knowledge transfer logs and reports, including sign off from individual knowledge recipients

The skills and expertise transferred back to the internal Defra team will help improve efficiency and effectiveness, and provide a framework to deliver future strategic projects

The supplier will provide: All documents, reports, excel files, presentations

The supplier will delete: any commercially information that is not required to be kept

The supplier will prepare a handover note of any outstanding issues

Notice period

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

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



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1. Business Area identifies a potential need for delivery support, initiates a conversation with DgC, confirms which approvals are required for an engagement to occur, e.g. Consultancy Governance Board if over £100k or DgC Corporate Services Delivery Board if under £100k.
2. Request Form completed by Business Area and submitted to DgC at:
[REDACTED]
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"> ▪ DPEL agreed ▪ DPEL signed: Supplier, Dept and CO ▪ Purchase Order number 	<ul style="list-style-type: none"> ▪ Work can start ▪ Supplier can invoice for work

