

## Schedule 1: Call-Off Order Under G5 Framework

<b>Date</b>	11th November 2014	<b>Order Reference</b>	PO 6960 - ICF M&E and Knowledge Platform
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**FROM:**

Customer	Department for International Development (and others) <b>"Customer"</b>
Customer's Address	22 Whitehall, London, SW1A 2EG
Invoice Address	Abercrombie House, Eaglesham Road, East Kilbride, G75 8EA
Principal Contact	

**TO:**

Supplier	Alpine Resourcing Limited (t/a Alpine Advantage) <b>"Supplier"</b>
Supplier's Address	20 Little Britain, London, EC1A 7DH
Account Manager	

<b>1. TERM</b>
<p><b>1.1 Commencement Date</b></p> <p>This Call-Off Agreement commences on: 11<sup>th</sup> November 2014</p> <p><b>1.2 Expiry Date</b></p> <p>This Call-Off Agreement shall expire on:</p> <p>1.2.1 September 30<sup>th</sup> 2016 or</p> <p>1.2.2 the second (2) anniversary of the Commencement Date; whichever is the earlier, unless terminated earlier pursuant to Clause CO-9 of the Call-Off Agreement.</p> <p><b>1.3 Services Requirements</b></p> <p>1.3.1 This Order is for the G-Cloud services outlined below. .</p> <p>1.3.2 G-Cloud Services</p> <p>1.3.2.1 Lot1 IaaS      None</p> <p>1.3.2.2 Lot 2 PaaS      None</p> <p>1.3.2.3 Lot 3 SaaS      Gaiasoft Performance Management, Monitoring and related software based upon Cloudstore reference number 5.G4.0230.213. Specific details of the Platform are set out in separate DfID Terms of Reference and accompanying Alpine G-Cloud Commercial Terms.</p>

1.3.2.4 Lot 4 Specialist Cloud Services	None
1.3.2.5 G-Cloud Additional Services	None

## 2. PRINCIPAL LOCATIONS

### 2.1 Principal locations where the Work is being performed

The Platform will be available to any location in the United Kingdom or overseas over the Internet as requested by DfID or its nominee organisations from time to time.

The Platform's data centre will be located entirely within the United Kingdom.

Work will be initially at DfIDs London locations, Gaisoft's offices or development locations, East Kilbride, or other domestic or overseas locations as agreed from time to time.

## 3. STANDARDS

### 3.1 Quality Standards

1. The Primary quality standards are ISO9001 and ISO 27001

### 3.2 Standards (Technical)

2. HMG IA Standard No. 1
3. Convergence to - ISO/IEC 27002 (ISO/IEC 17799) (Code of Practice and Management)
4. Convergence to - Cloud Security Principles (.GOV) adoption when finalised
5. Convergence to - HMG Infosec Standard No. 1, Part 1 (Technical Risk Assessment)

## 4. ONBOARDING

### 4.1 On-boarding

Please refer to the Implementation Planning in Sect. 12

Users will be on-boarded as requested by DfID.

Sand-box low security data and examples will be required from DfID for development and early testing, and demonstration purposes.

The Platform will provide a start-up list of questions on results data, evaluation data, and meta data, delivered by physical or encrypted email; that data being loaded initially by Alpine/Gaiasoft.

After initiation, remote ICF projects are expected to submit their data directly into the ICF Knowledge Platform.

All data received from DFID will attract the level of security indicated by its means of sending, unless otherwise advised by DfID.

## **5. CUSTOMER RESPONSIBILITIES**

### **5.1 Customer's responsibilities**

DfID's (or its nominee department or organisation) will provide a designated contact working with Alpine/Gaiasoft designated contact, to update user details accordingly. This is to assure that malicious individuals may not gain access by stealth or obfuscation.

Where inappropriate user behaviour is notified to Alpine/Gaiasoft or nominee, the user will be summarily suspended by Alpine/Gaiasoft from the platform, whilst their nominee department contact investigates their professional conduct.

### **5.2 Customer's equipment**

DfID or its nominees are responsible for the provision of all user computer or mobile devices, Internet telecommunications ISP connectivity, printing, encryption devices and software, certification; and all other facilities and capabilities for the user to access and work with the platform over the Internet.

There is no GSI/GSIX or PSN connectivity to this Platform for internal government use.

## **6. PAYMENT**

### **6.1 Payment profile and method of payment**

Payments against a valid invoice paid by direct bank transfer to a nominated Alpine account, in Pounds Sterling to a UK domiciled bank.

Please refer to the Terms of Reference for the payment staging.

**Indicate preferred payment profile by selecting one from:**

6.1.1 Payments for the Platform will be invoiced on availability to users; ongoing support will be invoiced monthly in arrears.

6.1.2 Not applicable

### **6.2 Invoice format**

The Supplier shall issue electronic invoices by email Monthly in arrears.

The Customer shall pay the Supplier within thirty (30) calendar days of receipt of a valid invoice, submitted in accordance with this paragraph 6.2 the payment profile set out in paragraph 6.1 above and the provisions of this Call-Off Agreement.

## **7. DISPUTE RESOLUTION**

### **7.1 Level of Representative to whom disputes should be escalated to:**

Alpine Group Managing Director

## **7.2 Mediation Provider**

In the event that a dispute that cannot be resolved amicably, then the first action is to request the President of the Centre for Effective Dispute Resolution (CEDR) to nominate a suitable professional to mediate, whose determination is to be entirely binding upon the parties.

The costs of such mediation to be born equally by all parties without subsequent recourse to the others.

## **8. LIABILITY**

**Subject to the provisions of Clause CO 11 'Liability' of the Call-Off Agreement:**

8.1 The annual aggregate liability of either Party for all defaults resulting in direct loss of or damage to the property of the other Party (including technical infrastructure, assets, equipment or IPR but excluding any loss or damage to the Customer Data or Customer Personal Data) under or in connection with this Call-Off Agreement shall in no event exceed £250,000.

8.2 The annual aggregate liability for all defaults resulting in direct loss, destruction, corruption, degradation or damage to the Customer Data or the Customer Personal Data or any copy of such Customer Data, caused by the Supplier's default under or in connection with this Call-Off Agreement shall in no event exceed £1 million.

8.3 The annual aggregate liability under this Call-Off Agreement of either Party for all defaults other than those covered in clause 8.1 and/or 8.2 shall in no event exceed £100,000.

## **9. INSURANCE**

### **9.1 Minimum Insurance Period**

Three (3) Years following the expiration or earlier termination of this Call-Off Agreement for professional indemnity purposes only.

**9.2 To comply with its obligations under this Call-Off Agreement and as a minimum, where requested by the Customer in writing the Supplier shall ensure that:**

- **professional indemnity insurance** is held by the Supplier and by any agent, Sub-Contractor or consultant involved in the supply of the G-Cloud Services and that such professional indemnity insurance has a minimum limit of indemnity of one million pounds sterling (£1,000,000) for each individual claim or such higher limit as the Customer may reasonably require (and as required by Law) from time to time;
- **employers' liability insurance** with a minimum limit of five million pounds sterling (£5,000,000) or such higher minimum limit as required by Law from time to time.

## **10. TERMINATION**

### **10.1 Undisputed Sums Time Period**

At least ninety (90) Working Days of the date of the written notice specified in Clause CO 9.4 of the Call-Off Agreement.

### **10.2 Termination Without Cause**

At least ninety (90) Working Days in accordance with Clause CO9.2 of the Call-Off Agreement.

#### **11. AUDIT AND ACCESS**

Twelve (12) Months after the expiry of the Call-Off Agreement Period or following termination of this Call-Off Agreement.

#### **12. PERFORMANCE OF THE WORK AND DELIVERABLES**

##### **12.1 Implementation Plan and Milestones (including dates for completion)**

##### **12.2 Not Used**

Milestone	Deliverables	Duration	Milestone Date	Customer Responsibilities
1.	Handover of Platform and make available to users.	20 days	30 <sup>th</sup> November 2014	See accompanying Terms of Reference (Outputs 1 to 6) for details of staging and responsibilities.
2.	Closure of Platform and off-boarding of Users and data by agreement with DfID.	10 days	September 30 <sup>th</sup> 2016	Format for off-boarding to be agreed.

12.1.1 If so required by the Customer, the Supplier shall produce within one (1) Month of the Commencement Date a further version of the Implementation Plan (based on the above plan) in such further detail as the Customer may reasonably require. The Supplier shall ensure that each version of the Implementation Plan is subject to Customer's written approval.

The Supplier shall ensure that the Implementation Plan is maintained and updated on a regular basis, as may be necessary to reflect the then current state of the implementation transition and/or transformation of the Work.

12.1.2 The Customer shall have the right to require the Supplier to include any reasonable changes or provisions in each version of the Implementation Plan.

12.1.3 The Supplier shall perform its obligations so as to achieve each milestone by the milestone date.

#### **13. COLLABORATION AGREEMENT**

In accordance with Clause CO-21 of this Contract, the Customer does not require the Supplier to enter into a Collaboration Agreement with another supplier.

**BY SIGNING AND RETURNING THIS ORDER FORM THE SUPPLIER AGREES** to enter a legally binding contract with the Customer to provide the G-Cloud Services. The Parties hereby acknowledge and agree that they have read the Call-Off Terms and the Order Form and by signing below agree to be bound by the terms of this Call-Off Agreement.

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

Name and Title	
Position	
Signature	
Date	

**For and on behalf of the Customer:**

Name and Title	
Position	Procurement and Commercial Manager
Signature	
Date	11 <sup>th</sup> November 2014

# **PO 6960 - Annex A**

## **Terms of Reference for the ICF Results and Knowledge Platform**

### **1. Introduction**

- 1.1 The UK Government is providing £3.87 billion of Official Development Assistance (ODA) over the period 2011/12 to 2015/16 to help developing countries achieve low carbon, climate resilient development that supports growth and reduces poverty. This funding is being delivered through the International Climate Fund (ICF) and represents a contribution towards developed countries' agreement to mobilise \$100 billion per annum of public and private finance by 2020 as part of the negotiations under the United Nations Framework Convention on Climate Change (UNFCCC).
- 1.2 The Department for International Development is responsible for the overall management of the fund and lead on adaptation and the Department for Energy and Climate Change (DECC) is responsible for mitigation and the Department for the Environment, Food and Rural Affairs (DEFRA) is responsible for forest-related activity.
- 1.3 Capturing and disseminating robust data, evidence, knowledge and re-usable good practice generated through ICF programmes is critical to demonstrating the feasibility and desirability of low carbon, climate resilient development – a key ICF objective. Equally, information to be gathered through this contract will supplement internal processes to strengthen public accountability and value for money from the ICF by supporting transparency and measurement-based performance management.
- 1.4 Currently a data collection system based on a series of excel worksheets is being used to internally report, collect and aggregate ICF results. Every ICF programme has its own worksheet for reporting, resulting in excess of 150 worksheets to be managed and kept up to date centrally. This approach has been tested over the past year and various challenges identified. For example, data entry is time consuming and prone to error; time lags exist between data reporting and aggregation; difficulties in sharing 150+ spreadsheets with interested users; and difficulties in presenting the data in different ways for further analysis. A further challenge is the inability of DECC and DEFRA to access DFID systems (e.g. Aries, Quest), and in the case of DECC have therefore established a separate reporting system, which presents further challenges for sharing and updating information.
- 1.5 The need for a dedicated knowledge and results platform has been identified which will be accessible for all ICF programmes, including those led by DECC and DEFRA to address these problems and make significant efficiency savings, in addition to enabling a more strategic use of results and programme level metadata. This has been discussed with BSD, FPID and DFID's Chief Statistician who see the merits of such an approach and are looking at the ICF experience as a potential pilot for the rest of the organisation.
- 1.6 This work requires provision, configuration and development of results data collection system and knowledge platform for ICF program using Gaiasoft software and Template Library. This assignment uses the agile development approach to maximise value and speed of delivery. The assignment will deliver the ICF knowledge platform

to include M&E of ICF projects and programs including data capture, scorecards and dashboards of results, overall program summary, interactive charting and other features as agreed with DFID during the agile development process. The service is based on the standard G-Cloud service offering “International Development by Gaiasoft” under the “Alpine Gaiasoft” listing.

1.7 An agile approach will allow feedback from users and other sources to be incorporated into the platform over time.

1.8 The later stages of platform development will address the networking and peer learning of ICF stakeholders and the exchange of knowledge, ideas, products and services between them. A business model will be developed whereby the economic activity of the marketplace could finance the ongoing costs of maintaining and improving the ICF knowledge platform as a resource for future use.

## **2. The objective**

2.1 The overall requirement of this assignment is to produce a results and knowledge platform to enable reporting, aggregating, management and sharing of quantitative and qualitative data from climate programmes by multiple users simultaneously.

2.2 An off the shelf but adaptable platform owned by Gaiasoft has been identified which will be accessible for all ICF programmes, including those led by DECC and DEFRA. The supplier will deliver a functioning version of this platform within the first two months of operation; this will then be used as a base to develop future iterations of the platform. This development will use an agile approach as objectives will be met incrementally and the project team will be able to make changes as needed based on feedback from users.

2.3 The platform will be designed to enable access by users across Whitehall (DFID, DECC, DEFRA, HMT, FCO) in the first instance and in the longer term limited access to agreed pages is planned to be made available to the public.

## **3. The recipient**

3.1 The primary recipient of the required services will be DFID, DECC and DEFRA officials working on delivering the ICF programme portfolio.

3.2 The UK public, National governments, international partners and civil society will also benefit when the ICF Results and Knowledge platform is deemed suitable to be shared externally.

## **4. The scope**

4.1 This programme of work will involve the development and delivery of a software package and related consulting and training for the capturing, analysis and sharing of ICF data. Please see Annex 1 for relationship between Outputs and key supplier milestones.



#### **Output 1: Development of data collection and access tools and systems:**

4.2 This output will deliver a data collection and reporting platform based on an off the shelf software package provided by Gaiasoft. After the platform has been set up and populated with relevant ICF data then the platform will be adapted to users' needs based on feedback and the agile development approach outlined under Output 6.

#### **Output 2: Development of data presentation and performance management tools:**

4.3 This output will deliver a series of searchable and dynamic data presentation tools i.e. interactive pages that allow the user to search for programme/s and view relevant data through appropriate visualisation tools. A base set of these requirements have already been identified but the ICF project owner may vary and/or add to what is needed during the project based on user feedback.

#### **Output 3: Sharing of results and knowledge information via the platform:**

4.4 This output will deliver information and systems that allows for the sharing of results and knowledge information collected through the platform. The base requirements for this output have been identified (see below) but the ICF project owner may vary and/or add to what is needed during the project based on user feedback.

#### **Output 4: Service management during lifetime of project:**

4.5 This output focusses on the management of a web based data collection and analysis tool during the lifetime of this project including maintenance of software, support of users and hosting of the platform under a contract provided under G-Cloud. The base requirements for this output have been identified (see below) but the ICF project owner may vary and/or add to what is needed during the project based on user feedback.

#### **Output 5: Service management plans after lifetime of development project:**

4.6 This output focusses on the preparation for a web based data collection and analysis tool subsequent to the lifetime of this project which means providing ongoing hosting, maintenance and support of the ICF data, knowledge and templates. The base requirements for this output have been identified (see below) but the ICF project owner may vary and/or add to what is needed during the project based on user feedback.

4.7 It is preferable that the after lifetime development of the project will be self-financing based on a business model that supports exchange of knowledge, products and services related to ICF. The after lifetime use of the platform will thereby multiply the impact of the ICF knowledge platform as measured by the ICF indicators. This is an area of work that is of a lower priority and the client will need to confirm before any work begins.

4.8 Training and support in implementation and upgrading support for a period of up to two years after system delivery. This should be costed on a 'call down' basis i.e. cost per day required as precise needs are not definable at this point.

#### **Output 6: Overall Development Approach:**

4.9 This output is focussed on the development of the process that will capture user feedback and then feed this into further development work.

## 5. The requirements

### Output 1: Development of data collection systems

5.1 The expected deliverables are listed below. However, the ICF project owner may vary what is needed during the project based on user feedback.

#### Platform - within first 2 months:

- The off-the-shelf G-Cloud software service to be configured and populated with existing data subset suitable for non-secure sandbox use. The sandbox use will enable sharing of the platform user interface with contracted web designers who are bound only by commercial non-disclosure. This will enable rapid development of the user interface without security risk to DFID data. The data to be loaded includes:
  - Results data
  - Evaluation data (focussing on delivery times and progress to date) - Programme metadata
- Install the off the shelf software onto G-Cloud or Sandbox server. Includes IBM licence purchase, G-Cloud cloud server initialisation, Scorecard Install, Definition and Configuration. And provision of 120 user accounts for later on-boarding.
- Results and knowledge platform system base configuration which includes design and implementation of meta data mapping between ICF structure and G-Cloud M&E platform features, functions and attributes.
- Definition of security groups and access rights which will address which roles can use the platform and whether they are a user, editor or administrator.
- Agree security level required for ICF data sets taking account of possibility of making some data subsets publicly available in future.
- Initial configuration for the standard ICF KPIs, including a mix of qualitative and quantitative indicators.

#### Medium term - 2 to 6 months:

- Implement security requirements for ICF data sets prior to making available through the platform.
  - Develop a process to report ICF results directly into the results and knowledge platform i.e. not via excel spreadsheets.
- Regular qualitative reporting (e.g. quarterly) at the programme level of feedback on progress/challenges
- Identify further items that may be tracked in further developments
  - Access to Data with simple query interface to quantitative ICF data in relational store. Further access to qualitative data for knowledge discovery will be developed through agile process.

#### Long term – 6 months onwards:

- Continued support in reporting and quality assurance of ICF KPI results data
- Support training for new user

### Output 2: Development of data presentation and access tools:

5.2 The expected deliverables are listed below. However, the ICF project owner may vary what is needed during the project based on user feedback.

#### Short term - within first 2 months:

Design and prototype user interface for the following in consultation with the Client:

- Ability to search by KPI results and programmes
- Dashboard tools for ICF Board performance reporting – requires Integrated Dashboard Template Library and Relational Data Bridge.

- Summary pages to include summary graphics and interactive charts for each of the:
  - KPI
  - Programmes
  - Thematic sectors
  - Qualitative questions
- Comparison and analysis tool including the ability to be able to interrogate disaggregated data for example by gender, income group etc
- Search tool which may be embedded in front page
- Further tools and functions to be developed based on user needs e.g. evaluation summaries, ICAI/MTE recommendations, financial spend etc

Medium term - 3 to 6 months:

Design and prototype user interface for the following in consultation with the Client:

- Continued work on development of systems and tools as listed above
- Further development and/or improvements based on user feedback
- Consider with DFID providing OLAP and MongoDB access to provide more value from ICF data. Development will be subject to agreement with DFID.

Long term – 6 months onwards:

- Finalisation of development based on user feedback

**Output 3: Sharing of results and knowledge information via the platform:**

5.3 The expected deliverables are listed below. However, the ICF project owner may vary what is needed during the project based on user feedback.

Medium term - 3 to 6 months:

- Ensure that this work stream ties in with the wider ICF knowledge and learning agenda
- Produce a report on how the results and knowledge platform can be used to help achieve ICF monitoring, knowledge and learning goals.
- User access to programme level monitoring data, qualitative feedback, project documentation
- Enable access by users across Whitehall (DFID, DECC, DEFRA, HMT, FCO).
- In time the intention is to make this available to the public (with different users having different levels of access) but not until the system is clearly providing value and has been field tested. Before this can take place we will need to obtain approval through the Digital Approval Panel and Government Digital Service.

Long term – 6 months onwards:

Establish Communities of Practice (Meshwork) and dissemination support. This will be addressed when outputs 1 and 2 have been delivered to a satisfactory level.

- Share information and knowledge across an ICF network and with partners, providing easy access to information to help new programming in design and implementation.
- Business Model Platform support for business model including marketplace for ICF related ideas, products, services and investments.

**Output 4: Service management during lifetime of this project:**

5.4 The expected deliverables are listed below. However, the ICF project owner may vary what is needed during the project based on user feedback.

Short term - within first 2 months:

- Given the limited duration of the ICF project, it is highly desirable that the ICF knowledge platform should be made fully functional as a results and knowledge platform as soon as possible. An initial deliverable will be made prior to July 24<sup>th</sup> in

order to be ready to demonstrate the vision and practical use of the ICF results and knowledge platform at the ICF Board meeting. This will include base platform existing functionality and user interface design for other functions as agreed with the sponsor and as time permits.

Long term – 6 months onwards:

- Ongoing management of the service ensuring that it accessible and useable at all times.
- Training and support to users during the lifetime of the project.

**Output 5: Service management plans after lifetime of this project:**

Medium term - 2 to 6 months:

- Financial Sustainability and Impact of ICF Knowledge Platform and ICF projects. Develop recommendations on a business model for sustainability.

Long term – 6 months onwards to Agreement Close:

- Operate and Improve ICF platform towards financial sustainability and magnified impact.

**Output 6: Overall Development Approach:**

5.5 An agile approach to development of the results and knowledge platform will be applied. This approach will broadly follow the Scrum method with repeated agreement of what is important to deliver next, within the larger scope of the Results and Knowledge Platform Service Design.

5.6 A key principle of Scrum is its recognition that during a project the customers can change their minds about what they want and need (often called requirements churn), and that unpredicted challenges cannot be easily addressed in a traditional predictive or planned manner. As such, Scrum adopts an empirical approach—accepting that the problem cannot be fully understood or defined, focusing instead on maximizing the team's ability to deliver quickly and respond to emerging requirements.

5.7 To fit with this approach, these Terms of Reference are a statement of what capabilities are expected to be delivered, but the ICF project owner may vary what is needed during the project.

5.8 A suggestions, issues and risk log will be maintained linking to each output. These suggestions, issues and risks may also be considered when defining next tasks to implement during the agile development process.

Short term - within first 2 months:

- Scrum Setup requires Output 1 to be completed before it can be completed. This will include a review of the configured results and knowledge platform as the starting point for agile development.
- Outline specific plans for Agile/Scrum and how this will work to ensure that the client understands clearly their and the suppliers responsibilities and the mechanics behind using this development method.
- Define core roles according to Scrum method.  
Agree frequency of Scrum meetings and who should attend.
- A suggestions, issues and risk log will be initiated and maintained linking to functional elements of each output.
- These suggestions, issues and risks may also be considered when defining next tasks to implement during the agile development process.
- Review Scrum Product Backlog and initial Sprint Backlog. Start with document review, interviews and 2 x 1 day workshops.
- Understand users' needs through:

- Agreeing with project team a set of information to be provided or gathered through workshops from interviews or discussions to understand what users wish to achieve. Information to inform the design process is expected to include:
  - o Board, Secretary of State and other key stakeholder needs
  - o Current concerns, issues, risks, according to these and other stakeholders
  - o Background ICF material including:
    - ICF project definition documents, data, reports
    - Listing of user and stakeholder roles (in ICF)
    - Responses to questions from key stakeholders
    - Tags and categorisations used in relevant DFID document management
    - Glossary of relevant terms

Medium term - 3 to 6 months:

- The Scrum method is an iterative process, whereby a Scrum Product Backlog will be updated through user feedback and consultation. A subset of this backlog will be selected as the Sprint Backlog for immediate implementation in months 3-6.

Long term – 6 months onwards to Agreement Close:

- After delivery of each Sprint Backlog, the Scrum Product Backlog will be updated through user feedback and consultation. A Sprint Backlog will be selected and implemented.
- This process will complete for the first year of the project, or until the major deliverables are completed to a satisfactory level.

## **6. Constraints and dependencies**

### **Constraints:**

- 6.1 The results and knowledge platform is to be delivered to work on different types of UK government desktop and laptop computers and in time subsets of the platform may also be made accessible to the public via the internet.
- 6.2 The G-Cloud may not be available to all users of the system, in this eventuality a workaround will be applied to enable this access.
- 6.3 The suppliers will need access to relevant stakeholders either in person or via email and questionnaires. To help enable this access the relevant HMG leads will provide the necessary support.
- 6.4 The suppliers will need to work with IT suppliers in the relevant Government Departments to ensure they can obtain access to IT systems and climate programme metadata stored on Departments administrative systems.

### **Dependencies:**

- 6.5 The initial setup of the Results and Knowledge Platform will need to be complete before the planned Agile (Scrum) approach to this work can be finalised.
- 6.6 The work under outputs 2 and 3 will be delivered using the agile process once this approach has been finalised.
- 6.7 The long term deliverable under output 3 will only be initiated when the basic requirements of Outputs 1 and 2 have been delivered to a satisfactory level and are functionally stable.

6.8 Work may be required to take place in London and East Kilbride. Where travel is required travel costs will be chargeable at DFID agreed rates. Other required travel and subsistence expenses associated with agreed travel for the project implementation will be charged at DFID agreed rates.

## **7. Implementation requirements**

7.1 Not applicable. As soon as the procurement process is complete we expect the supplier to be able to begin implementation of this work immediately. Items are required to be ordered from the G-Cloud catalogue in order for implementation to begin.

## **8. Reporting**

### **8.1 Verbal Reporting:**

- In the first month of the project the supplier will provide a weekly verbal update to the project lead.
- Following the first month these verbal reports will take place less often – to be agreed with the supplier.
- Verbal updates will consist of an update on progress and any issues that have arisen and how these are being addressed.
- Verbal updates should not prevent the supplier from raising issues outside these formal updates if they are likely to slow delivery.

### **8.2 Written Reporting**

- A Checkpoint Report to be delivered monthly via a project M&E web page to include the following:
  - Period covered
  - Follow-up actions - from previous reports
  - This reporting period
    - Products being developed
    - Products completed
    - Quality management activities carried out
    - Lessons identified
  - Next reporting period
    - Products being developed in next period
    - Products planned to be completed
    - Quality management activities planned
  - Project Package Status
    - How is delivery performing against
      - Cost
      - Time
      - Milestones
  - Issues and Risks

## **9. Time frame**

9.1 The project is expected to last for a minimum of 24 months from onset to completion starting November 2014 and ending November 2016. However, this time period may

be extended to enable completion of development objectives identified and agreed through the agile development process.

9.2 An agile development and software delivery practice will allow for concurrent delivery of a live managed service at the same time as development of future release versions. The first milestone delivery is planned prior to 30<sup>th</sup> November 2014. From this date an initial demonstration service will be available for use as “beta” based on a subset of ICF data. This version will then be under management. Subsequent improvements will be made by implementing a Sprint Backlog to develop and test a next release. Each such version will be released by refreshing/updating the template for the live beta version. In consultation with the client, the suppliers will agree when to declare the first version of the ICF Knowledge Platform. Subsequent versions will be managed while any development continues only on a development version.

## **10. DFID co-ordination**

10.1 Overall responsibility for contractual relations will reside with the Results Adviser in DFID’s Climate and Environment department (CED), with support from one of DECC’s M&E leads. This group will be responsible for the client side of the Agile Development process through deciding what is added to the Scrum Backlog and by facilitating the selection of Sprint Backlog for each successive delivery.

10.2 A cross Whitehall technical advisory group will be established. This will include one or more technical experts from DFID, DECC and Defra to provide advice and challenge directed through a single principle point of contact nominated by DFID. This group will input to the Agile Development process through adding to the Scrum Backlog and help to select the Sprint Backlog for each successive delivery. This technical advisory group will ensure the product meets relevant government IT standards based on Business Impact Level 2 security chosen for the platform. This group will also consider where and how the learnings and work products from this process can be applied to DFID’s wider needs, raising questions and opportunities that may result in additions to the Scrum Backlog and Sprint Backlog for subsequent releases.

## **Other requirements**

### **11. Security**

12.1 The supplier will ensure that the results and knowledge platform meets the required Business Impact Level 2 security requirement. Where different information sets require lower levels of security, this will be agreed in advance with DFID. DFID will advise on necessary Business Impact Level to be achieved and any specific CESG policy to be met (from the link below). Additional costs of meeting such CESG standards beyond agreed Business Impact Level will be charged to DFID from the total project budget.

<http://www.cesg.gov.uk/publications/Pages/categorylist.aspx?cat=IA+Policy+%26+Guidance>

### **12. Performance requirements**

14.1 The success of this project will be measured against agreed criteria set initially as:

- Delivery of outputs as described above
- Delivery to the agreed timescales and cost.

- Successful conclusion of user acceptance testing.
- Delivery of a web platform that meets the requirements of the users.
- A clear and effective engagement with users through the platform.