

## Defra Group Management Consultancy Framework: Project Engagement Letter

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

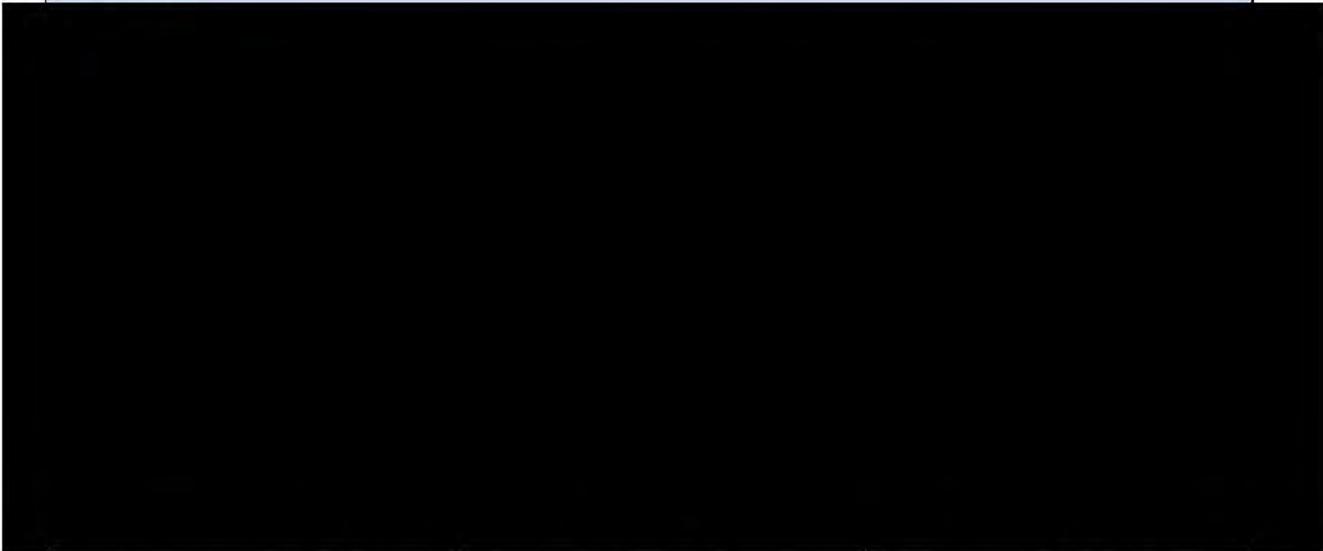
Engagement details		
Engagement ref #	DPEL_61541_046	
Extension?	N	DPEL Ref.
Business Area	Environment Strategy / CSAO	
Programme / Project	Natural Capital and Ecosystem Assessment Programme (tNCEA – Terrestrial)	
Senior Responsible Officer	[REDACTED]	
Supplier	Methods Business & Technology Ltd (Methods)	
Title	PMO development and coaching, user research and data modelling.	
Short description	The provision of programme development capability services to support the enhancement of tNCEA's PMO self-sufficiency and maturity, specifically in PMO design, development and delivery, user research, strategy development and data modelling, with associated coaching and knowledge transfer.	
Engagement start / end date	Proposed start date 18/08/22	Proposed end date 25/11/2022
Funding source (CDEL/RDEL)	tNCEA budget (CDEL)	
Consultancy Spend approval reference		
Expected costs 21/22	£0	
Expected costs 22/23	£287,854	
Expected costs 23/24	£0	
Dept. PO reference		
Lot #	Lot 3	
Version #	V0.10	



### Approval of Project Engagement Letter

By signing and returning this cover note, **Defra and tNCEA** accepts 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 (**Lot 3 - Ref 28595**), with Defra Group and confirms the availability of funding to support recharge for the services.

#### Signatures



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

Supplier contact: [redacted] Principal P3M Consultant, [redacted]  
[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 tNCEA programme started in July 2020 when HMT awarded DEFRA £5Mn for 20/21 to start the Terrestrial pilot of the 'Natural Capital and Ecosystem Assessment Programme' as part of DEFRA's Project Speed commitment to the Prime Minister.

Support is required to further develop and embed a PMO to underpin delivery of the tNCEA Programme focused on project controls, risk and issue management, reporting and financial management as priority considerations. Support will also be provided to develop user research and data planning capability.

The service must develop and deliver robust PMO mechanisms whilst simultaneously planning and executing transition of PMO services to Defra. A tailored mentoring & coaching programme will ensure upskilling of DEFRA staff to support a phased transition from Methods lead to Defra, resulting in a self-sustaining capability to support future requirements

This DPEL sets out the high-level delivery objectives during the course of the engagement and a Service Definition Document (SDD) will be developed by Methods staff by no later than the end of the first week of the contract which will provide a more detailed breakdown for each deliverable. This will be developed in conjunction with DEFRA staff and will allow Methods delivery to be more accurately monitored than is achievable through a DPEL alone. The SDD will be a deliverable in its own right.

## 2. Statement of services

### Objectives and outcomes to be achieved

The objectives for this work are separated into five key areas:

1. Programme Management Office (PMO) Design, Delivery and Development
2. Programme Management Office (PMO) Coaching and Knowledge Transfer
3. Definition of a minimum viable data-set and proof of concept functional planning tool
4. User research capability discovery development
5. Support to the data strategy next steps

#### 1. PMO Design, Delivery and Development

**Objective 1a:** To implement fit for purpose, proportionate PMO mechanisms to underpin tNCEA and support its delivery (specifically Project Controls, RAID Management, Communications, Reporting and Financial Management).



This area of delivery intends to support the development of the PMO from its current state to a self-sustaining model and will be measurable through internal and industry standard methodologies. This work will include establishing and embedding clear structures for PMO functions whilst also implementing effective and efficient reporting owned by the PMO to support the establishment of effective programme governance. This will include designing a clear PMO operating model and development plan as part of the implementation of the wider programme Target Operating Model. The service will work to ensure that the requirements of reporting processes/artefacts are compatible with Project Portal.

To achieve this objective, the managed service will:

- Assess options for, design, and communicate proportionate PMO processes, guidance, tools and templates including definition of roles and responsibilities.
- Develop, communicate and deliver the PMO processes, guidance, tools and templates.
- Focus on tNCEA PMO priorities that include Project Controls, RAID Management, Communications, Reporting and Financial Management given the compressed delivery timeframe and current level of PMO maturity.

**Objective 1b:** To deliver an effective, proportionate PMO service in line with the Programme Operating Model, that reflects tNCEA's needs and enables its effectiveness.

To achieve this objective, the managed service will:

- Deploy suitably skilled and experienced PPM professionals to ensure priority PMO processes can be delivered as they are being formalised.
  - Prioritised areas of tNCEA PMO delivery: Project Controls, RAID Management, Reporting and Financial Management

## **2. PMO Coaching and Knowledge Transfer**

**Objective:** To establish greater self-sufficiency for Defra in tNCEA's PMO delivery.

This area of delivery will establish greater self-sufficiency in PMO delivery, holding Methods to account for the upskilling of DEFRA colleagues. To achieve this objective, the managed service will:

- Undertake a planned but flexible approach to knowledge and skills transfer for priority PMO processes commensurate with onboarding timescales for Defra PMO resources.
- Plan for the gradual transfer of responsibility from Methods to DEFRA for the operation of the PMO from day one, transferring knowledge accordingly where resources are available.
- Measure maturity and routinely target knowledge and skills transfer activity accordingly.
- Provide access to key process documentation, tools, and key artefacts to support delivery of PMO processes.
- Maintain a record of knowledge transfer activity and recommend future development beyond the lifetime of this engagement.

## **3. Definition of a minimum viable data-set and proof of concept functional planning tool**

**Objective:** To create a minimum viable dataset using an initial MS Excel data model tool

This service will take the learning and output from previous discovery work to design and prove a capability concept to demonstrate the efficiency gains of having a single interrogable dataset.

The creation of a minimum viable dataset will demonstrate the utility and data gaps that will inform developing a functional planning tool. Existing datasets can be utilised to develop an initial MS Excel data model that can show the intentions of the planning tool. To achieve this objective, the managed service will:

- Re-engage stakeholders within the programme team, EA, NE, and FR



- Review previous commissioning and planning activities to identify best practices and data collections that reflect the business requirement needs
- From this activity will to create a set of commissioning guidance that sets out the data requirements for the tool specifically what and how to create unit costs
- Create a transparent taxonomy to classify data terms and consider whether a data catalogue of existing data across the programme is required
- Create a data standard for the minimum viable dataset
- Access the datasets
- Assess the structure and look to align the input data from the different sources
- Build a prototype model
- Document data flow and process
- Test and iterate with user feedback
- Work with tNCEA and ALB partners to determine future options for a viable product

#### 4. User research capability design and development

**Objective 4a** To conduct user research for the Change Detection project and establish greater self-sufficiency within [REDACTED] for user research. Conducting user research will document understanding of potential users of the product, what users do currently to meet their needs in this area, what pain points users may have now meeting their needs and whether the product currently meets those needs or could meet those needs in the future. This area of delivery will also build some independent user research capability within [REDACTED] to support future work. To achieve this objective, the managed service will use semi-structured research interviews.

- Depending on clarification around the targeting of user groups, 10 - 15 users (such as wildlife trusts) from different demographic backgrounds will be interviewed. The focus of these research interviews will be to establish user needs. Once established with a participant in an interview, the researcher will introduce the prototype as a concept to the participant to elicit additional needs.
- We will work with [REDACTED] to build a team understanding of needs and to knowledge transfer user research skills. This service will test and build a capability within [REDACTED] from which learning can be applied and extended to other partners.

This user research is focused on practitioner science i.e. those employed directly in the collection of environmental data.

**Objective 4b** Undertake a short discovery of work required to establish a Citizen Science Repository

Undertaking a discovery exercise to explore the requirements for user research in the development of a Citizen science repository. This service will be provided through engagement with key stakeholders and development teams.

This user research is focused on citizen science, i.e. engaging with the public, NGOs and the like who have an interest in providing environmental data.

#### 5. Support to the data strategy next steps

**Objective:** To support the delivery of the data strategy

- Support in making any amendments as required from the data strategy reviews and wider programme engagement
- Create a shortened version of the data strategy in Powerpoint for dissemination and use in engagement and workshops once the main strategy document is signed off



Department  
for Environment  
Food & Rural Affairs

- Support the development of an operations plan to prioritise the next steps and actions within the data strategy
- Support in the development of a data strategy communication and adoption plan
- Review terrestrial programme processes and advise on amendments so that the data strategy principles can be adopted into work packages
- Progress the identified key actions from the strategy and undertake knowledge transfer to key staff

### Scope

The scope of this work is limited to the deliverables for tNCEA as outlined in this DPEL and supporting SDD unless modified through formal change control processes.



## Assumptions and dependencies

### Assumptions

- For the purposes of this engagement, business case development is primarily a facilitation activity. Defra has identified and made available the required resources to author the necessary content to fulfil the written requirements of the business case document.
- That Methods staff will have access to key stakeholders who will engage meaningfully and promptly to provide information for inclusion within the deliverables.
- That Methods staff will have access to all key data sources as may be required to support the development of the deliverables.
- 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 that key topics of interest will be identified and communicated to the Methods team for this purpose.
- That there will be named individuals within the PMO Team to take on the responsibilities of each PMO role to be handed over, either at the start of the engagement or arriving soon thereafter, so that self-sufficiency is a viable aim.
- That there will be a formal review of the DPEL on 30<sup>th</sup> September to determine which of the services have been successfully transferred to the PMO team and which services need to continue.
- The MS Excel Proof of Concept will be used to assemble data and demonstrate the value of the data being in one place. It will not seek to validate the use of MS Excel for this purpose as MS Excel is not the recommended final tool.

### Dependencies

- Knowledge Transfer is dependent on there being DEFRA staff in place and with sufficient time throughout the length of the engagement.
- That the business case will complete Red Team Review before significant progress can be made on the coordination of the next necessary steps of its development
- User Research is dependent on ALB engagement with respect to people and data

## 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 deliver will be managed through project level risk processes.

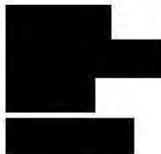
Key risks to the service delivery already identified include:

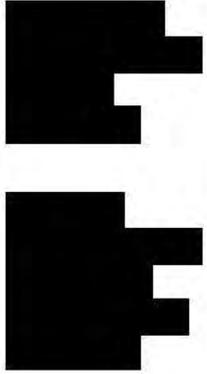
- Risk of insufficient ALB engagement and access to relevant people and data
- Risk of failure of Defra to recruit or otherwise resource personell to receive knowledge transfer to achieve this deliverable.

A service delivery level risk register will be produced as part of the Service Definition Document (SDD) which will be shared with DEFRA so that all identified risks can be managed appropriately.

**Deliverables**

Deliverable	Success Criteria	Milestone / Date	Owner (who in the delivery team?)
<b>Production of Contract Management Documentation</b>			
Service Definition Document	<ul style="list-style-type: none"> <li>• Further level of detail of each deliverable including sign-off governance</li> <li>• Document agreed between Defra and Methods and subjected to regular review to ensure the deliverables remain accurate and that progress is routinely monitored.</li> </ul>	[REDACTED]	[REDACTED]
<b>Objective 1 PMO Delivery and Development</b>			
PMO Vision and Design	<ul style="list-style-type: none"> <li>• Effectively re-baselines tNCEA's vision for its PMO – its structure, processes, guidance and RACI</li> <li>• Define vision and capability requirements for the PMO it's processes and its interactions with all stakeholders</li> <li>• With reference to the Programme TOM, define and document PMO operating model architecture and capability development plan</li> <li>• Plan, communicate and deliver an effective and efficient implementation plan to operationalise the PMO vision and design, embed processes and knowledge transfer.</li> <li>• Workshop with senior stakeholders to sign off the implementation plan.</li> </ul>	[REDACTED]	[REDACTED]
Artefact and Process Review	<ul style="list-style-type: none"> <li>• Refine the PMO artifacts to ensure their efficiency and effectiveness making recommendations as appropriate to reflect the developing programme context and PMO capability</li> <li>• Develop and communicate proportionate processes to support the use and embedding of the developed artifacts.</li> <li>• All templates and processes aligned with Project Portal templates / processes.</li> </ul>	[REDACTED]	[REDACTED]
RAID Management Build	<ul style="list-style-type: none"> <li>• Clearly articulated and communicated RAID management process, guidance and artefacts.</li> </ul>	[REDACTED]	[REDACTED]

Deliverable	Success Criteria	Milestone / Date	Owner (who in the delivery team?)
	<ul style="list-style-type: none"> <li>• Clear mechanisms for management of risk at the right level (project vs. programme) and clear pathways between levels.</li> <li>• RAID processes agreed with stakeholders and embedded in governance.</li> <li>• RAID processes fully operationalised and managed through PMO Alignment to future Project Portal templates / processes to be considered.</li> </ul>		
Financial Management service	<ul style="list-style-type: none"> <li>• Established proportionate financial management processes and guidance for tNCEA and its projects</li> <li>• Report highlighting lessons learned and best practice from similar engagements (mNCEA)</li> <li>• Design of tNCEA specific processes which align with Defra best-practice/guidance and results in the required information to feed timely senior management decision making</li> <li>• Consult on re-structuring of analysis codes to enable reporting at the right level</li> <li>• Set up of Finance trackers to monitor expenditure and ensure effective forecasting</li> <li>• Establishment of monthly meetings with ALBs to review expenditure and update finance trackers</li> <li>• Establishment of monthly meetings with SRO/ Budget holder and FBP</li> <li>• Creation of resource trackers to monitor resourcing and FTE</li> <li>• Respond to finance and resourcing commissions, including SR/ budget review and reporting into tNCEA Boards.</li> </ul>		
Highlight Reporting Build	<ul style="list-style-type: none"> <li>• Clearly articulated and communicated highlight reporting process, guidance document and artefacts.</li> <li>• Highlight reporting aligns with governance structure and mobilisation of secretariat function to ensure all boards receive timely information and reporting to enable effective decision making. Clear mechanisms for management of changes, escalations</li> </ul>		

Deliverable	Success Criteria	Milestone / Date	Owner (who in the delivery team?)
	and exceptions identified through highlight reporting. <ul style="list-style-type: none"> <li>Alignment to future Project Portal templates / processes to be considered</li> </ul>		
Programme Planning Service	<ul style="list-style-type: none"> <li>Baseline programme plan approved by delivery and change board.</li> <li>Iteration of existing programme plan in line with changing needs of tNCEA</li> <li>Maintains best-practice planning standards</li> <li>Additional detail added to commence development of L2 programme plan where this is available from the project teams</li> <li>Establishes clear view of known interdependencies – dependencies linked within MSP.</li> <li>Plans to work towards and established self-sufficiency and capability in internal Defra team developed, communicated and being implemented</li> <li>Programme plan and change controls understood and implemented effectively managed by PMO.</li> <li>Monthly POAP and milestone reporting produced</li> <li>Reporting at project level, ALB level and workstream level.</li> </ul>		
Communications and Engagement Planning	<ul style="list-style-type: none"> <li>Communications plan refined and presented to Senior Managers for agreement and authorisation</li> <li>Maintains (clear, concise, achievable, time-bound) and iterates communications plan in line with evolving tNCEA and stakeholder needs</li> <li>Delivery of clear and concise communications in accordance with the communications plan,</li> <li>Enhanced awareness of tNCEA and key messages across intended stakeholder audiences</li> <li>tNCEA core brief, key lines and Q&amp;A developed</li> <li>Review and update of ministerial briefing and documentation,</li> <li>Work collaboratively to develop joint nNCEA and tNCEA briefing</li> <li>Establish process for managing correspondence and PQs</li> </ul>		

Deliverable	Success Criteria	Milestone / Date	Owner (who in the delivery team?)
	<ul style="list-style-type: none"> <li>Respond to commissions and PQs and seek necessary clearance.</li> <li>Speaking notes for board meetings, town halls and other senior engagement activity.</li> </ul>		
Business Case Facilitation Service	<ul style="list-style-type: none"> <li>Coordinates the effective and proportionate development of the tNCEA business case.</li> <li>Plans and gathers input from key parties</li> <li>Maintains regular cadence of business case working groups to foster engagement from key parties and keeps key stakeholders informed of progress.</li> <li>Develop plan to take business case through HMT and IPA.</li> <li>Prepare documentation and oversee handling for MPRG/ IPA review.</li> <li>Preparatory work for GMPP on-boarding and reporting</li> </ul>	<p>[REDACTED]</p> <p>[REDACTED]</p> <p>[REDACTED]</p>	<p>[REDACTED]</p>
Benefits Management Service	<ul style="list-style-type: none"> <li>Builds upon existing tNCEA benefits management products and processes i.e. matures benefits mapping, profiling, planning</li> <li>Workshops to Establish benefits tracking mechanisms for priority measurement indicators delivered</li> <li>Assign benefit owners</li> <li>Benefits strategy drafted and agreed</li> <li>Seeks to create a more joined-up approach to benefits management across NCEA programmes</li> <li>Provides a feed into business case development</li> </ul>	<p>[REDACTED]</p> <p>[REDACTED]</p>	<p>[REDACTED]</p>
<b>Objective 3 Minimum viable data-set and proof of concept functional planning tool</b>			
Fieldwork sampling costs POC	<ul style="list-style-type: none"> <li>Identifies all relevant data subcategories collected by Data Owners and then jointly evaluated as to which are needed/useful for the Unit</li> </ul>	<p>[REDACTED]</p>	<p>[REDACTED]</p>

Deliverable	Success Criteria	Milestone / Date	Owner (who in the delivery team?)
(Minimum viable dataset)	<p>Effort Breakdown from the perspective of the NCEA programme</p> <ul style="list-style-type: none"> <li>• Allows the tNCEA programme to consider what types of cost breakdown would be important for planning and commissioning and give an indication to what extent accepting data owners' current unit costing breakdowns is acceptable for use in the tool.</li> <li>• Allows evaluation on what unit cost/effort breakdowns are actually feasible within the current data schemes and how these could best be applied/adapted to give the accuracy and useful insights needed for the tool</li> </ul>	[REDACTED]	
<p>Fieldwork sampling costs POC  (Functional planning tool)</p>	<ul style="list-style-type: none"> <li>• Accessible MS Excel tool</li> <li>• Allows users to see the potential inputs and outputs for informing decisions</li> <li>• Supports the development of the minimum viable dataset by highlighting strengths and weaknesses of current data assets for planning purposes</li> <li>• Recommendations for a ...</li> </ul>	[REDACTED]	[REDACTED]
<b>Objective 4 - User research capability design and development</b>			
<p>User research insight and user needs (Objective 4a)</p>	<ul style="list-style-type: none"> <li>• A full user research insight deck with                             <ul style="list-style-type: none"> <li>◦ Details of user groups to date</li> <li>◦ Details of the user research methodologies used including participant recruitment methods, sampling and research ethics</li> <li>◦ User research artefacts that tell a compelling story about what we've learnt from users (which could include personas, mindsets, empathy maps, video clips, audio clips and user journey maps)</li> <li>◦ Recommendations around next steps</li> </ul> </li> <li>• A series of any high-level user needs (epics) that have been identified, acting as a starting point for future product iteration.</li> </ul>	[REDACTED]	[REDACTED]
<p>Citizen Science repository user research discovery report (Objective 4b)</p>	<ul style="list-style-type: none"> <li>• Report sufficient to plan next steps and recommendations for proportionate user research</li> </ul>	[REDACTED]	[REDACTED]
<b>6. Objective 5 - Support to the data strategy next steps</b>			

Deliverable	Success Criteria	Milestone / Date	Owner (who in the delivery team?)
Support to the data strategy next steps	<ul style="list-style-type: none"> <li>• Make amendments as required from the data strategy reviews and wider programme engagement</li> <li>• Create a shortened version of the data strategy in Powerpoint</li> <li>• Support the creation operations plan to prioritise the next steps and actions within the data strategy</li> <li>• Support the development of a data strategy communication and adoption plan</li> <li>• Review terrestrial programme processes and advise on amendments</li> </ul>	[REDACTED]	[REDACTED]
<b>Coaching &amp; Knowledge Transfer (Objective 1b and throughout)</b>			
Sustainability Development: Knowledge Transfer Plan, Log and Report (across all deliverables)	<ul style="list-style-type: none"> <li>• Clear and concise KT planning</li> <li>• Evidence of effective knowledge sharing, upskilling civil servant tNCEA PMO professionals</li> <li>• Structured and tailored KT activity relevant to needs</li> <li>• Repository of evidence of knowledge transfer</li> <li>• KT Planning covers aspects of all services provided through this DPEL.</li> </ul>	[REDACTED]	[REDACTED]
Tailored Knowledge Transfer (across all deliverables)	<ul style="list-style-type: none"> <li>• Successful execution of knowledge transfer plans</li> <li>• Established greater sustainability through planned and tailored knowledge and capability transfer</li> <li>• Tailored coaching to each individual on the team to increase confidence and role specific knowledge.</li> <li>• Meetings to be held with each individual on the PMO team during first week of engagement to understand priority areas for coaching focus.</li> <li>• Recommendations for areas of individual focus for the duration of the contract and auditable action plan.</li> <li>• Records kept of coaching engagement for everyone.</li> </ul>	[REDACTED]	[REDACTED]
mNCEA/tNCEA PMO Information Sharing	<ul style="list-style-type: none"> <li>• Identification and facilitation of opportunities to shadow the mNCEA PMO function.</li> </ul>	[REDACTED]	[REDACTED]

Deliverable	Success Criteria	Milestone / Date	Owner (who in the delivery team?)
	<ul style="list-style-type: none"> <li>Organisation of opportunities for tNCEA PMO to observe how the mNCEA PMO operates to identify good practice and opportunities for common approaches</li> </ul>		
User research guidance	<ul style="list-style-type: none"> <li>A template consent form, information sheet and discussion guide that can be used in future user research activity.</li> <li>A guide on how to take notes during semi-structured interviews.</li> </ul>		

### Limitations on scope and change control

Unless instructions to the Supplier are later amended in writing, the work undertaken will be restricted to that set out above. In providing the services detailed above, the Supplier will be acting in reliance on information provided by the Business Area.

The Project Engagement Letter is the agreed contract of work between the Defra Group Business Area and the Supplier and can be varied under the change control process. Any changes to timescales, scope and costs will require approval by DgC.

### 3. Delivery team

Role (link to stage/s resource will work on)	Grade	Daily rate	# of days	Cost
Engagement & Finance Lead	Managing Consultant			
PMO OM and Risk & Reporting Analyst	Senior Consultant			
PMO Lead	Principal Consultant			
Senior PMO Support Officer	Consultant			
Business Case Advisor	Managing Consultant			
Business Case Coordinator	Senior Consultant			
Communications Lead	Senior Consultant			



Role (link to stage/s resource will work on)	Grade	Daily rate	# of days	Cost
Strategic Programme Advisor and Benefits Management Lead	Principal Consultant	■	■	■
Programme Planning Lead	Managing Consultant	■	■	■
Assurance Lead	Managing Consultant	■	■	■
User researcher	Senior Consultant	■	■	■
Data scientist	Principal Consultant	■	■	■
Business analyst	Senior Consultant	■	■	■
Data and tooling Consultant	Principal Consultant	■	■	■
<b>TOTAL COST</b>				<b>£287,854</b>

**Total resource**

Total days\*  
**Engagement Length\*\***

\*Total days worked across all resources

\*\*Total working days in engagement

**Business Area's team**

We will be working with the established Defra NCEA programme team, delivery partner leads, Defra Portfolio Directorate and governance primarily Partnership working Group, Delivery Group and Steering Group.

**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 £287,854, inclusive of expenses and excluding VAT.

Stage	Cost	Due (link to milestone dates)
<b>Checkpoint Review</b>		<b>DD/MM/YY</b>
Progress against PMO service, User Research and coaching deliverables as set out in DPEL.	■	■



Stage	Cost	Due (link to milestone dates)
<b>PMO development completion</b>		
Completion of all PMO and UR deliverables set out in DPEL and finalisation of all knowledge transfer.	████████	████████
<b>Dataset and planning tool</b>		
Completion of minimum viable dataset and MS Excel proof of concept	████████	████████
<b>Expenses</b>		
Where travel outside London (or agree base location) is required, further Purchase Order cover will be agreed to reimburse at the conclusion of the work, in line with Defra expense policy.	████████	████████
<b>Grand total</b>	<b>£287,854</b>	

### 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
	N/A	N/A				

### Feedback and satisfaction



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

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

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

### **Non-disclosure agreements**

The overarching MCF2 framework 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.



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:  
[consultancy2@defra.gov.uk](mailto:consultancy2@defra.gov.uk)
3. The form is reviewed by the DgC team around which resource route is most appropriate (e.g. Lots 1/2/3) and may request additional information/edits from the Business Area if required.
4. Lot / Supplier is selected and briefed on the request by DgC, then introduced to the requesting Business Area for further discussion and confirmation of work to be delivered
5. A Project Engagement Letter is completed by the Business Area with input from the Supplier (with supporting proposals as appropriate) and then finally agreed between the two parties, including evidence of all required approvals either being in place or being progressed (e.g. PO) and forwarded to the DgC for review by the Consultancy Governance Board (CGB). Approval states are:

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

