



Crown
Commercial
Service

Digital Outcomes and Specialists 5 (RM1043.7)

Framework Schedule 6 (Order Form)

Version 2

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Framework Schedule 6 (Order Form Template, Statement of Work Template and Call-Off Schedules)

Order Form

Call-Off Reference: **DDaT22085 - Digital Outcomes and Specialist Opportunity**

Call-Off Title: **DDaT22085 - Simple Energy Advice Beta**

Call-Off Contract Description: **Beta is focused on testing and refining the prototype for the new user journey identified in Alpha and launching the new construction of SEA to the public. By end of Beta, there will be an end-to-end service, with complete security and accessibility testing, and handover for the live service team.**

The Buyer: Department for Business Energy & Industrial Strategy

Buyer Address: 1 Victoria St, London SW1H 0ET

The Supplier: Softwire Technology Limited

Supplier Registered Address: Gallery Court, 28 Arcadia Avenue, London N3 2FG

Supplier Office address: 110 Highgate Studios, 53-79 Highgate Road, London, NW5 1TL

Registration Number: 3824658

Applicable Framework Contract

This Order Form is for the provision of the Call-Off Deliverables and dated **Thursday 21st April 2022**

It's issued under the Framework Contract with the reference number RM1043.7 for the provision of Digital Outcomes and Specialists Deliverables.

The Parties intend that this Call-Off Contract will not, except for the first Statement of Work which shall be executed at the same time that the Call-Off Contract is executed, oblige the Buyer to buy or the Supplier to supply Deliverables.

The Parties agree that when a Buyer seeks further Deliverables from the Supplier under the Call-Off Contract, the Buyer and Supplier will agree and execute a further Statement of Work (in the form of the template set out in Annex 1 to this Framework Schedule 6 (Order Form Template, Statement of Work Template and Call-Off Schedules)).

Upon the execution of each Statement of Work it shall become incorporated into the Buyer and Supplier's Call-Off Contract.

Call-Off Lot

Lot 1: Digital Outcomes

Call-Off Incorporated Terms

The following documents are incorporated into this Call-Off Contract. Where numbers are missing, we are not using those schedules. If the documents conflict, the following order of precedence applies:

- 1 This Order Form including the Call-Off Special Terms and Call-Off Special Schedules.
- 2 Joint Schedule 1 (Definitions) RM1043.7
- 3 Framework Special Terms
- 4 The following Schedules in equal order of precedence:
 - Joint Schedules for RM1043.7
 - Joint Schedule 2 (Variation Form)
 - Joint Schedule 3 (Insurance Requirements)
 - Joint Schedule 6 (Key Subcontractors)
 - Joint Schedule 11 (Processing Data)
 - Joint Schedule 12 (Supply Chain Visibility)

- Call-Off Schedules for RM1043.7
 - Call-Off Schedule 5 (Pricing Details and Expenses Policy)
 - Call-Off Schedule 7 (Key Supplier Staff)
 - Call-Off Schedule 9 (Security)
 - Call-Off Schedule 10 (Exit Management)
 - Call-Off Schedule 15 (Call-Off Contract Management)
 - Call-Off Schedule 20 (Call-Off Specification)
 - Call-Off Schedule 26 (Cyber Essentials Scheme)

5 CCS Core Terms (version 3.0.9)

6 Joint Schedule 5 (Corporate Social Responsibility) RM1043.7

7 Call-Off Schedule 4 (Call-Off Tender) as long as any parts of the Call-Off Tender that offer a better commercial position for the Buyer (as decided by the Buyer) take precedence over the documents above.

No other Supplier terms are part of the Call-Off Contract. That includes any terms written on the back of, added to this Order Form, or presented at the time of delivery.

Call-Off Special Terms

The following Special Terms are incorporated into this Call-Off Contract:

None

Call-Off Start Date: **Monday 25th April 2022**

Call-Off Expiry Date: **Friday 15th July 2022**

Call-Off Initial Period: **12 weeks, 8 weeks private Beta, 4 weeks public Beta**

Call-Off Optional Extension Period: **3 weeks (25% of 12 week call-off initial period) and £67,625.00 excluding VAT (20% of 12 week initial call-off contract value)**

Minimum Notice Period for Extensions: Framework standard is no less than 4-week notice

Call-Off Contract Value: **£338,125.00 excluding VAT. The initial contract value for 12 weeks shall not exceed £338,125.00 excluding VAT with up to an additional £67,625.00 excluding VAT should Department for Business Energy & Industrial Strategy decide to utilise the up to 20% contingency margin to accommodate any changes to the SOW deliverables during the term of the SOW as stated in the DOS framework agreement. However, there is no commitment to spend up to this amount.**

Call-Off Deliverables

(Call-Off Specification)

| | |
|------------------------------|---|
| Organisation the work is for | Department for Business Energy & Industrial Strategy – Energy Efficiency & Local |
| Why the work is being done | <p>The Simple Energy Advice (SEA) website, designed to provide bespoke advice to the public on improving home energy efficiency, will be achieved on the recommendation of the Central Digital and Data Office (formerly Government Digital Services). An improved service will be developed on GOV.UK, in accordance with the GOV.UK proposition.</p> <p>Thus far, a discovery has been completed and this identified the user need for the service to transition to GOV.UK and opportunities for improvement to the existing content. In January 2022, the Alpha stage commenced, focusing on identifying the user journey for the new service on GOV.UK, creating a prototype, and establishing how the existing SEA content will be transitioned across to fit within the new user journey.</p> <p>The Beta phase is the next necessary stage in transitioning SEA to GOV.UK. It will focus on testing and refining the prototype developed in Alpha and launching the new construction of SEA to the Public.</p> |
| Problem to be solved | <p>SEA must transition to GOV.UK due to the removal of the Central Digital and Data Office (formerly Government Digital Services) GOV.UK exemption. The Beta is a necessary stage in this transition.</p> <p>The key objectives of the Beta are:</p> <ol style="list-style-type: none"> 1. Test and refine the prototype for the new user journey identified in Alpha. 2. Launch the new construction of SEA to the public. <p>The key outcomes from the Beta include:</p> <ol style="list-style-type: none"> 1. A full end-to-end service 2. Testing for accessibility and security complete 3. Assisted digital support implemented 4. An understanding of future resources required for the service |

| | |
|--|---|
| | <p>5. A continuous improvement plan established (based on factors such as KPIs and user feedback)</p> <p>6. Documentation and handover for the live service team</p> |
| Who the users are and what they need to do | <p>Homeowners – need recommendations to improve the energy performance of their home, access to tradespeople and information on Government support schemes to reduce their energy bills.</p> <p>Landlords – need recommendations to improve the energy performance of their property to ensure compliance with Energy Efficiency Standards, access to tradespeople and information on Government support schemes to reduce tenants' energy bills.</p> <p>Tenant – needs to know their rights regarding the energy performance of the property they rent and know actions they can take to improve energy performance to reduce their energy bills.</p> <p>100 character limit - Wordcount: 87</p> |
| Early market engagement | Not applicable |
| Any work that's already been done | <p>A discovery has been completed which identified the user need for the service to transition to GOV.UK and opportunities for improvement to the existing content. The Alpha project will focus on identifying the user journey for the new service on GOV.UK and how the existing SEA content will be transitioned across to fit within the new user journey.</p> <p>The 10-week Alpha phase commenced in January 2022, to conclude on March 25th 2022. The key objectives of the Alpha are identifying the set-up of the new website on GOV.UK and creating the prototype for the new user journey that combines the existing SEA content. Outputs will be made available when complete.</p> <p>Previous outputs/backlogs/etc. will be shared with all shortlisted suppliers.</p> |
| Current phase | Alpha is ongoing until March 25 th 2022. The phase we are procuring for is Beta, which will commence with private Beta. |
| Existing team | <p>The supplier will predominantly be working with:</p> <p>The Energy Efficiency & Local team in BEIS, in particular the Home Energy Retrofit Consumer Advice and Information Team (5 key staff members)</p> |
| Address where the work will take place | <p>With the team working remotely, it is expected the supplier will do the same. However, if the need arises, the supplier's team may need to travel to the 1 Victoria Street HQ in London for a meeting/workshop(s).</p> |
| Working arrangements | <p>The supplier staff will be expected to be available during the typical working hours of the policy team (Monday to Friday 9:30am-5pm) in order to maximise knowledge transfer.</p> <p>We require the supplier to hold agile ceremonies as well as weekly updates. 'show and tell' sessions for BEIS stakeholders, taking place over MS Teams. Other tools such as JIRA, Azure DevOps, Mural, Microsoft Whiteboard and Office 365 can/may be used for collaboration too.</p> |
| Security clearance | All individuals must have BPSS as a minimum. |
| Latest start date | 19/04/2022 |
| Expected contract length | 12 weeks: 8 weeks private Beta, 4 weeks public Beta |

| | |
|---------------------------------|---|
| Additional terms and conditions | Not applicable |
| Budget range | £ 341,875 |
| Summary of the work | <p>Beta is focused on testing and refining the prototype for the new user journey identified in Alpha and launching the new construction of SEA to the public. By end of Beta, there will be an end-to-end service, with complete security and accessibility testing, and handover for the live service team.</p> <p>50 word limit: 50 words</p> |

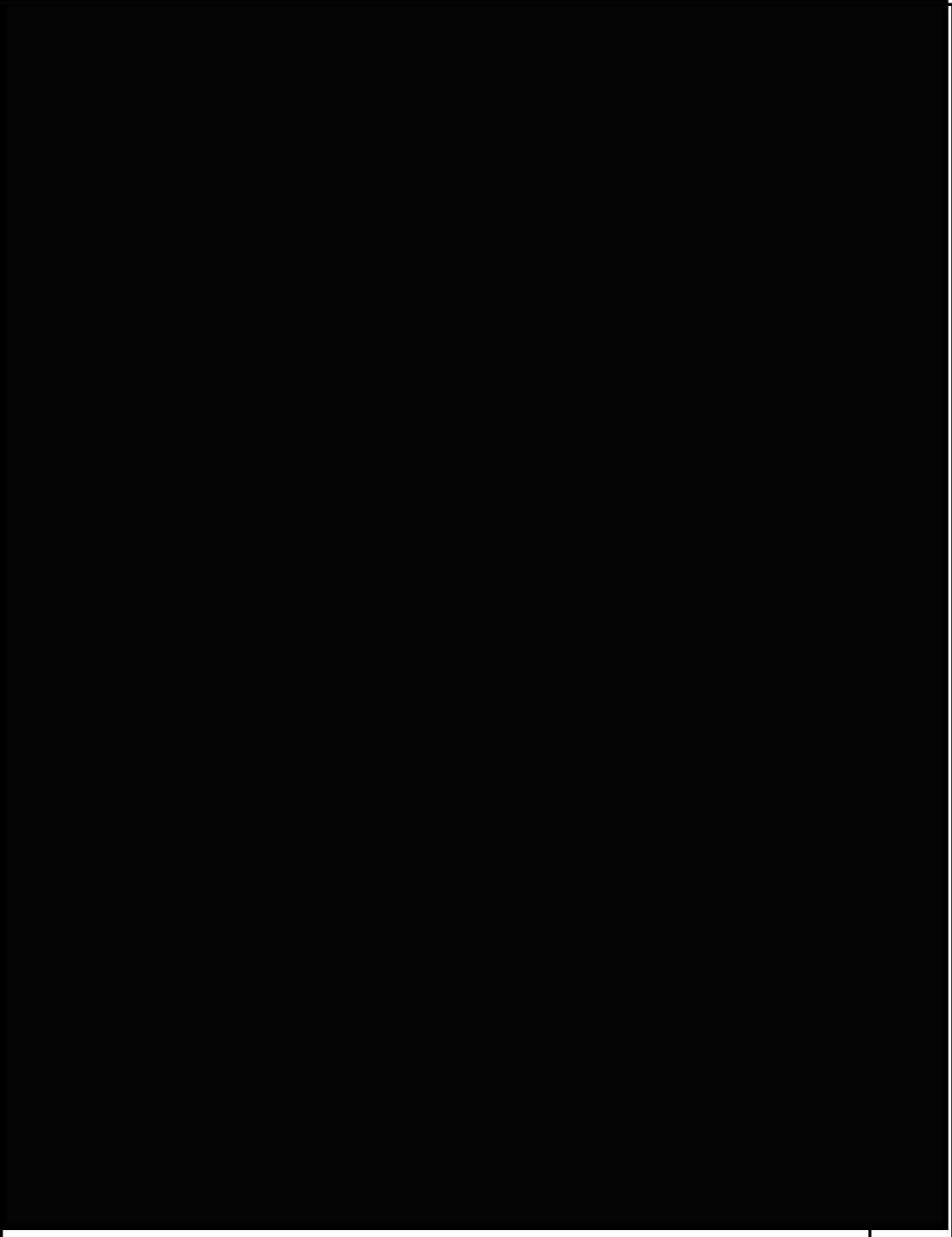
Suppliers Response

| | |
|--------------------------|---|
| Approach and Methodology | <p>Describe the approach and methodology you will apply to Beta, including how priorities will be determined and emerging findings presented (5%)</p> <div></div> |
|--------------------------|---|

SECRET

| | | |
|-------------|----------------|--|
| <div></div> | | |
| | Team Structure | |

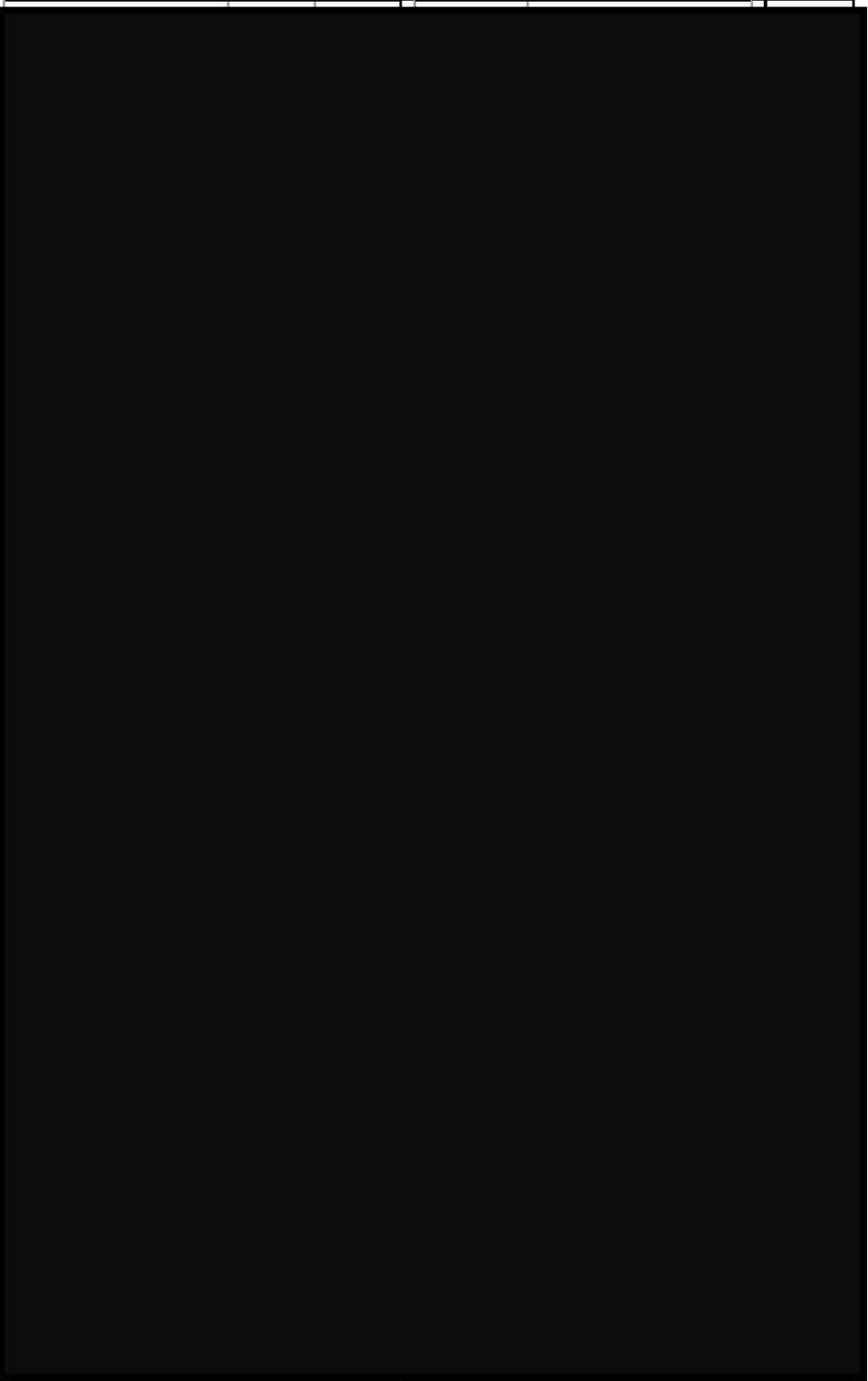
| | | |
|-------------|---------------------|--|
| <div></div> | | |
| | Proposed Timescales | |

| | |
|---|--|
|  | |
| | |
| | |

Framework Schedule 6 (Order Form Template, Statement of Work Template and Call-Off Schedules)

| Risks and Dependencies | |
|------------------------|--|
| | |

Framework Schedule 6 (Order Form Template, Statement of Work Template and Call-Off Schedules)

| | | |
|--|---|-----------------|
| |  | |
| | | |
| | | Value for Money |

[illegible]

Framework Schedule 6 (Order Form Template, Statement of Work Template and Call-Off Schedules)

Buyer's Standards

From the Start Date of this Call-Off Contract, the Supplier shall comply with the relevant (and current as of the Call-Off Start Date) Standards referred to in Framework Schedule 1 (Specification). The Buyer requires the Supplier to comply with the following additional Standards for this Call-Off Contract:

None

Cyber Essentials Scheme

The Buyer requires the Supplier, in accordance with Call-Off Schedule 26 (Cyber Essentials Scheme) to provide a **Cyber Essentials Certificate** prior to commencing the provision of any Deliverables under this Call-Off Contract.

Maximum Liability

The limitation of liability for this Call-Off Contract is stated in Clause 11.2 of the Core Terms as amended by the Framework Award Form Special Terms.

The Estimated Year 1 Charges used to calculate liability in the first Contract Year is **£338,125.00** excluding VAT

Framework Schedule 6 (Order Form Template, Statement of Work Template and Call-Off Schedules)

Call-Off Charges

1 Capped Time and Materials (CTM)

| | |
|--------------------------|--|
| SOURCING REFERENCE: | DDaT22085 |
| SOURCING DOCUMENT TITLE: | DDaT22085 - BEIS – Simple Energy Advice Beta |
| BIDDER NAME | Softwire |

Please complete the shaded yellow sections only

Bidders are required to complete all yellow highlighted cells.

All costs provided are fixed and firm for the full duration of the contract.

Where bidders are not offering a discounted day rate please ensure that the day rate price is copied into the discounted cell.

Variant bids / options are not permitted and will not be accepted.

For the avoidance of doubt the total compiled within cell F53 shall be used for evaluation purposes.

Section 1: Day Rates

| Role Title | List Day Rate Total Cost excluding VAT | Discounted Day Rate Total Cost excluding VAT | Number of Days | Total Cost (ex VAT) |
|--|--|--|----------------|------------------------|
| | | | | |
| TOTAL (CAPPED TIME AND MATERIALS PRICE) | | | | £ 338,125.00 |

All prices are exclusive of VAT

Where non-UK Supplier Staff (including Subcontractors) are used to provide any element of the Deliverables under this Call-Off Contract, the applicable rate card(s) shall be incorporated into Call-Off Schedule 5 (Pricing Details and Expenses Policy) and the Supplier shall, under each SOW, charge the Buyer a rate no greater than those set out in the applicable rate card for the Supplier Staff undertaking that element of work on the Deliverables.

Framework Schedule 6 (Order Form Template, Statement of Work Template and Call-Off Schedules)

Reimbursable Expenses

None

Payment Method

BACS (30 days in arrears upon receipt of a valid invoice)

All invoices to be submitted monthly

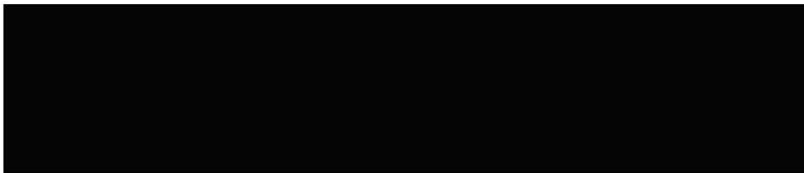
All invoices must be sent to



Buyer's Invoice Address

The Department for Business, Energy and Industrial Strategy
c/o UK SBS
Polaris House
North Star Avenue
Swindon
SN2 1FF

Buyer's Authorised Representative



Buyer's Environmental Policy

Available online at : [beis-environmental-policy.pdf \(publishing.service.gov.uk\)](#)

Buyer's Security Policy:

Available online at: [Security policy framework - GOV.UK \(www.gov.uk\)](#)

Supplier's Authorised Representative

Softwire UK
110 Highgate Studios
53-79 Highgate Road
London
NW5 1TL

Supplier's Contract Manager



Framework Schedule 6 (Order Form Template, Statement of Work Template and Call-Off Schedules)

Progress Report Frequency

On the first Working Day of each calendar month

Progress Meeting Frequency

Quarterly on the first Working Day of each quarter

Key Staff

| Name | Role | Details |
|------|------|---------|
| | | |

Worker Engagement Route – This requirement is outside of IR35

Key Subcontractor(s)

Energy Saving Trust Enterprises Limited
30 North Colonnade,
Canary Wharf,
London,
E14 5GP

Company Number: 07805748

Contacts:



The subcontractor are not an affiliate of the supplier.

Commercially Sensitive Information

Please see Joint Schedule 4

Balanced Scorecard

Not Applicable

Material KPIs

Not Applicable

Framework Schedule 6 (Order Form Template, Statement of Work Template and Call-Off Schedules)

Additional Insurances

Not applicable

Guarantee

Not applicable

Social Value Commitment

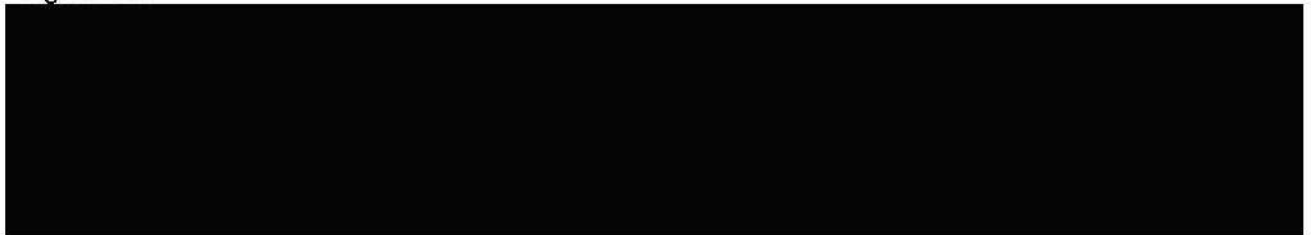
Not applicable

Statement of Works

During the Call-Off Contract Period, the Buyer and Supplier may agree and execute completed Statement of Works. Upon execution of a Statement of Work the provisions detailed therein shall be incorporated into the Call-Off Contract to which this Order Form relates.

For and on behalf of the Supplier:

Signature:

A large black rectangular box redacting the signature of the Supplier.

For and on behalf of the Buyer:

A large black rectangular box redacting the signature of the Buyer.

Framework Schedule 6 (Order Form Template, Statement of Work Template and Call-Off Schedules)

Annex 1

Statement of Works (SOW) Details

Upon execution, this SOW forms part of the Call-Off Contract (reference below).

The Parties will execute a SOW for each set of Buyer Deliverables required. Any ad-hoc Deliverables requirements are to be treated as individual requirements in their own right and the Parties should execute a separate SOW in respect of each, or alternatively agree a Variation to an existing SOW.

All SOWs must fall within the Specification and provisions of the Call-Off Contract.

The details set out within this SOW apply only in relation to the Deliverables detailed herein and will not apply to any other SOWs executed or to be executed under this Call-Off Contract, unless otherwise agreed by the Parties in writing.

Date of SOW: 25th April 2022

SOW Title: Simple Energy Advice Beta

SOW Reference: DDaT22085

Call-Off Contract Reference: DDaT22085

Buyer: Department for Business, Energy and Industrial Strategy

Supplier: Softwire Technology Limited

SOW Start Date: 25th April 2022

SOW End Date: Projected for 15th July 2022

Duration of SOW: Approximately 12 weeks

Key Personnel (Buyer):

Key Personnel (Supplier):



Subcontractors: Energy Saving Trust Enterprises Limited, 30 North Colonnade, Canary Wharf, London, United Kingdom, E14 5GP, Company number 07805748

Framework Schedule 6 (Order Form Template, Statement of Work Template and Call-Off Schedules)

Call-Off Contract Specification – Deliverables Context

SOW Deliverables Background:

There are two streams of work: Build and Enhance.

The Build stream is focused on building the minimum viable product (MVP).

The Enhance stream is focused on refining areas of the journey that weren't finalised during the Alpha phase of the Simple Energy Advice project.

Delivery phase(s): Beta

Overview of Requirement: Delivery

Buyer Requirements – SOW Deliverables

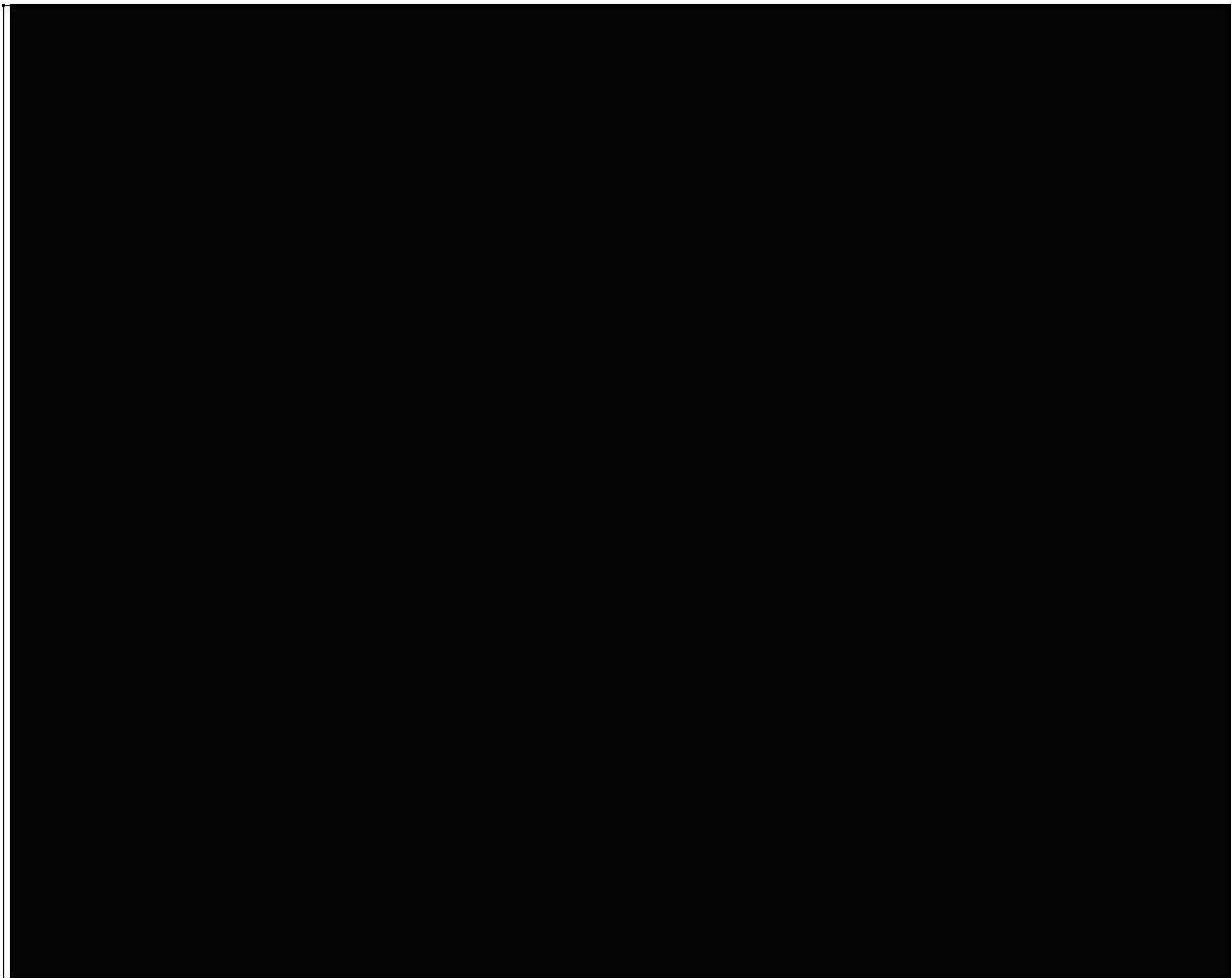
Outcome Description:

| Milestone Ref | Milestone Description | Acceptance Criteria | Due Date |
|---------------|-----------------------|---------------------|----------|
| | | | |

Delivery Plan:

See next page

Joint Schedule 2 (Variation Form)

Delivery Plan

Dependencies:

| Risks and Dependencies | Buyer or Supplier Risk/Dependency | Likelihood of Issue | Severity of Issue | Mitigations |
|--|--|----------------------------|--------------------------|---|
| Recruitment for re-search: recruiting users who fit within each of the key user groups | Supplier risk | Low | High | Supplier has a proven approach and track record of recruiting users who fit within 'hard to reach' categories (e.g., fuel poor in previous phases of SEA) |
| Meeting user expectations: serving a wide range of user needs and expectations regarding depth and range of advice | Supplier risk | Medium | Medium | Supplier will develop, test and iterate design elements with a view to enabling intuitive navigation to additional advice and further details for those who want it, while maintaining the integrity and usability of the core user journeys. |

Joint Schedule 2 (Variation Form)

| | | | | |
|--|------------------|--------|--------|---|
| Policy and scope changes: Supplier expects Buyer to provide insight to help the project team understand existing and potential policy changes. | Buyer dependency | Low | Medium | Supplier is working with the Energy Saving Trust, which has a high degree of understanding of the domestic energy context. Supplier will work closely with Buyer contacts to comply with policy goals. This will involve regular interactions throughout the project and seeking input of Buyer contacts into key decisions. |
| Technology challenges: changes in the APIs available (e.g., the potential change from Open EPC) will affect requirements | Buyer risk | Medium | Low | Supplier will have an open dialogue with Buyer, other government organisations and data providers to ensure that data remains available and up to date. The tech stack recommendations will reflect the need to adapt to reflect new data sources and APIs. |
| Supplier's existing Beta plan assumes no CMS will be built. | Buyer risk | Medium | Medium | Supplier will engage with Buyer early to ensure Supplier understands if the need for a CMS arises. The results of the project alpha phase suggested a CMS was not needed. If this changes, we will replace lower priority features of the MVP to accommodate a CMS provided that the overall level of Services to be provided under this SOW remain the same. |
| Users may struggle to continue their online journey effectively once they have left the service, due to a lack of coordinated digital support across the rest of gov.uk and beyond | Buyer risk | Medium | Medium | Supplier will liaise with other departments and service providers to maximise the potential for integration within the beta phase and create appropriate holding content to manage expectations for onward journeys where friction is likely. |

Joint Schedule 2 (Variation Form)

Supplier Resource Plan:

| Role | Supplier Staff | Contact Details |
|------|----------------|-----------------|
| | | |

Security Applicable to SOW:

The Supplier confirms that all Supplier Staff working on Buyer Sites and on Buyer Systems and Deliverables, have completed Supplier Staff Vetting in accordance with Paragraph 6 (Security of Supplier Staff) of Part B – Annex 1 (Baseline Security Requirements) of Call-Off Schedule 9 (Security).

If different security requirements than those set out in Call-Off Schedule 9 (Security) apply under this SOW, these shall be detailed below and apply only to this SOW:

N/A

Cyber Essentials Scheme:

The Buyer requires the Supplier to have and maintain a **Cyber Essentials Plus Certificate** for the work undertaken under this SOW, in accordance with Call-Off Schedule 26 (Cyber Essentials Scheme).

SOW Standards:

Not applicable

Performance Management:

Not applicable

| Material KPIs | Target | Measured by |
|----------------|--------|-------------|
| Not applicable | | |
| | | |

Joint Schedule 2 (Variation Form)

Additional Requirements:

Annex 1 – Where Annex 1 of Joint Schedule 11 (Processing Data) in the Call-Off Contract does not accurately reflect the data Processor / Controller arrangements applicable to this Statement of Work, the Parties shall comply with the revised Annex 1 attached to this Statement of Work.

Key Supplier Staff:

SOW Reporting Requirements:

[Further to the Supplier providing the management information detailed in Paragraph 6 of Call-Off Schedule 15 (Call Off Contract Management), the Supplier shall also provide the following additional management information under and applicable to this SOW only:

| Ref. | Type of Information | Which Services does this requirement apply to? | Required regularity of Submission |
|------|---|--|-----------------------------------|
| 1. | Status Reports | | |
| 1.1 | Budget tracking, current development progress, risks and issues for | All Services | weekly |

Charges**Call Off Contract Charges:**

The applicable charging method(s) for this SOW is:

Capped Time and Materials

The estimated maximum value of this SOW (irrespective of the selected charging method) is £338,125.00 (excluding VAT)

Joint Schedule 2 (Variation Form)

Rate Cards Applicable:**Supplier Day Rates**

| Role Title | Day Rate (Ex. VAT) | No. Person Days | Total Charge (Ex VAT) |
|------------|--------------------|-----------------|-----------------------|
| | | | |

Reimbursable Expenses:

Use
the

Signatures and Approvals**Agreement of this SOW**

BY SIGNING this Statement of Work, the Parties agree that it shall be incorporated into Appendix 1 of the Order Form and incorporated into the Call-Off Contract and be legally binding on the Parties:

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

Joint Schedule 2 (Variation Form)

Annex 1**Data Processing**

Prior to the execution of this Statement of Work, the Parties shall review Annex 1 of Joint Schedule 11 (Processing Data) and if the contents of Annex 1 does not adequately cover the Processor / Controller arrangements covered by this Statement of Work, Annex 1 shall be amended as set out below and the following table shall apply to the Processing activities undertaken under this Statement of Work only:

| Description | Details |
|---|---|
| Identity of Controller for each Category of Personal Data | The Parties are Independent Controllers of Personal Data The Supplier is an Independent Controller for the purposes of the Data Protection Legislation in respect of Personal Data of user research participants |
| Duration of the Processing | For the term of this SOW and any other optional variation of term included within this contract |
| Nature and purposes of the Processing | Collection, recording, organisation, structuring, storage, adaptation, retrieval, consultation, use, disclosure by transmission, dissemination, restriction, and destruction of data to support user research. |
| Type of Personal Data | Name, age, email, pay, social grade, postcode, marital status, housing situation |
| Categories of Data Subject | Members of the public acting as user research participants |
| Plan for return and destruction of the data once the Processing is complete UNLESS requirement under Union or Member State law to preserve that type of data | The Supplier will be working on Supplier systems and no Personal Data of user research participants will be required to be exported outside of Supplier systems. As such, Personal Data will be destroyed in accordance with Supplier policies and Data Protection Legislation. |