

## 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_024				
Extension?	N	DPEL Ref.	N/A		
Business Area	Environment Agency, Major Projects & Programme Delivery				
Programme / Project	Project and Programme Delivery Futures Programme				
Senior Responsible Officer	[REDACTED]				
Supplier	Methods				
Title	Project Data Analytics Approach				
Short description	<p>We are acting at pace to stand up the 'Project and Programme Delivery Futures Programme' to enable a step-change in how we deliver our major infrastructure investments, in the context of the climate and nature emergencies, and to stimulate local and national growth.</p> <p>We have concluded our discovery phase to analyse challenges and opportunities, and the following 4 distinct projects have been prioritised to align strategic direction, drive sustainability, reduce duplication and provide visibility:</p> <ol style="list-style-type: none"> <li>1) Lessons learned from our recently completed major infrastructure projects</li> <li>2) Data driven major infrastructure projects: real-time lessons learned</li> <li>3) Bespoke and Emerging Projects Governance</li> <li>4) <b>Project Data Analytics Approach</b></li> </ol> <p><b>This DPEL is for Project 4 only: Project Data Analytics Approach</b></p>				
Engagement start / end date	09/01/2023	24/03/2023			
Funding source (CDEL/RDEL)	RDEL				
Consultancy Spend approval reference	[REDACTED]				
Expected costs 22/23	£41,313.50				
Expected costs 23/24					
Expected costs 24/25					



Department  
for Environment  
Food & Rural Affairs

<b>Dept. PO reference</b>	Dept. PO reference # (to allow for Defra Group recharge)
<b>Lot #</b>	Lot 3
<b>Version #</b>	V1.0

### Approval of Project Engagement Letter

By signing and returning this cover note, the Bespoke and Emerging Projects Team (within the Environment Agency) 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**

## 1. Background

Delivery of our major projects and programmes are of a scale and urgency unprecedented. There are significant gaps in our capacity, capability, and tools to pilot, develop, and implement emerging practices and innovation in the project delivery space designed to tackle the nature and climate emergencies. As the Bespoke & Emerging Projects team (BEP) within Major Projects & Programme Delivery, it is our responsibility to address these gaps.

We partnered with Methods to conduct a discovery exercise to identify key challenges to project & programme delivery within the Environment Agency. The output from this exercise identified four emerging themes highlighting the greatest challenges and areas of opportunity for BEP and the wider Environment Agency community.

These themes included:

1. Vision & strategic alignment
2. Governance
3. Technology & tools
4. Change management

The discovery report for this piece of work can be found here: [REDACTED]

Looking strategically, pragmatically, and tactically at what can be delivered to address existing challenges and explore opportunities; the following distinct projects were prioritised as foundations to early success in the context of the climate and nature emergencies, and the drive to stimulate growth:

1. Lessons learned from our recently completed major infrastructure projects
2. Data driven major infrastructure projects: real-time lessons learned
3. Bespoke and Emerging Projects Governance
4. **Project Data Analytics Approach**

### Project Data Analytics Strategy

The BEP team are currently investing in data analytics projects, using the latest advances in technology to drive changes in project management including epics such as 'releasing capacity', 'executive level reporting and insights' and 'carbon and safety data'.

It is imperative that there are agreed principles, in how the data and information captured, is used, stored and shared to ensure the following (not a comprehensive list):

- legal compliance
- tools/technology selected is scalable
- data is accessible and shared (where appropriate)
- data is secure (as necessary)
- appropriate governance is in place

There are multiple teams across the Environment Agency and wider who consume, use and make decisions on our data. It is therefore essential an agreed set of principles are created to establish the above criteria in a consistent way across Environment Agency project delivery.

It is envisaged that our existing project data analytics principles will form the corner stone of a wider project data analytics approach, developed in collaboration with our stakeholders through workshop sessions.

An Environment Agency technical design forum / authority will be established to ensure our principles are adhered to and that business needs are met, working as part of our corporate data management governance.

## 2. Statement of services

### Objectives and outcomes to be achieved

#### Objectives:

- By 31/01/2023 complete a series of workshops with relevant personnel across the Environment Agency to agree our project data analytics principles, By 24/03/2023 establish terms of reference for a technical design authority (TDA)
- By 24/03/2023 Set up the first monthly TDA session.
- Propose next steps

#### Outcomes:

- Established project data analytics principles
- Established technical design authority terms of reference
- First technical design authority(TDA) meeting established

### Scope

Ensure existing project data analytics principles are fit for purpose  
Establish terms of reference for a technical design authority

To support the establishment of the TDA we expect the project to include the following features:

- Service Delivery Document (SDD) to ensure alignment between expectations and deliverables.
- Workshops – structured group activities to verify and explore implementation of our data principles.
- Delivery support – to establish the technical design authority Structured and robust knowledge and skills transfer from the Delivery Partner team to the internal programme staff to build capability for long term sustainability of the programme and its strategic objectives.

### Assumptions and dependencies

- The Bespoke & Emerging Projects team will facilitate and enable access for the Delivery Partner team to Environment Agency colleagues as appropriate and they will inform and validate activities.
- We will work together to set up collaborative online spaces using MS Teams, Miro, Mural or similar to share relevant documentation.
- BEP will provide a comprehensive stakeholder map with details of key individuals who will contribute to workshops.

### Risk management

- Capacity in Environment Agency project delivery teams to support and engage with the Delivery Partner. The 54 days effort for the engagement is allocated a window, until 27/03/23. Active participation will be required to attend workshops and support the new technical design authority set up. The associated outcomes may be impacted by a lack of active engagement.
- Single Point of Failure within the Bespoke & Emerging Projects team – it is a small team with limited resources. We will agree internal protocols so that the Delivery Partner is not adversely affected by unplanned absences, as far as possible.
- Single Point of Failure within the Bespoke & Emerging Projects team – it is a small team with limited resources. We will agree internal protocols so that the Delivery Partner is not adversely affected by unplanned absences, as far as possible. We will need a point of contact in the absence of the Programme Manager and Data Analytics Manager in addition to minimum monthly and adhoc meetings with the SRO.
- EA internal communication and change management plans are sufficient to encourage engagement.
- There is a planned change in SRO mid engagement, this may lead to a change in emphasis on the project.

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## Deliverables

This engagement will provide two core deliverables, see table below for detail.

Deliverable	Success Criteria	Milestone / Date	Owner (who in the delivery team?)
Verified set of principles for Project Data Analytics	The principles are agreed and signed off	31/03/23	Delivery Manager
Technical design authority terms of reference	The Terms of Reference are agreed and signed off	31/03/23	Engagement Lead / Delivery Manager
<b>Knowledge Transfer</b>			
Knowledge and skills transfer from the Delivery Partner team to internal EA staff to build long term capability	<ul style="list-style-type: none"> <li>• Work with BEP team (where possible/available) to proactively learn how to establish data principles, run and maintain a technical design authority.</li> </ul>	31/03/23	Engagement Lead / Delivery Manager

## 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
Assurance Lead	Director / Partner			
Engagement Lead	Management Consultant			
Delivery Manager	Consultant			
Data Service Designer	Management Consultant			

<b>Total resource</b>	<b>54 / 60</b>
<b>Total days* Engagement Length**</b>	<b>= .9</b>
*Total days worked across all resources **Total working days in engagement	

### Business Area's team

### 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 **£41,313.50** inclusive of expenses and excluding VAT.

Provide costs for any particular stages to the engagement.

Stage	Cost	Date
Initiation phase service delivery document completed		31/01/23
Workshops completed		28/02/23
Principles and ToR complete and project close		31/03/23
<b>Total</b>	<b>£41,313.50</b>	

#### Business Area considerations:

- Are the costs and fees appropriate (costs linked to deliverables, rates and drive value for money)?

### 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

Business Area to outline any additional governance and report requirements.

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;
- Reporting to be agreed with Programme Manager, all deliverables to be signed off by SRO

## Key Performance Indicators

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

KPI	KPI Requirement	Description	Reporting Frequency	Who Measures	Method of Measurement	Performance Target
1.	Availability of Methods	A named delivery contact or delegate will be available to the client for discussions within and outside of DPEL content during working hours and will respond within 24 hours to any email/communication if not sooner.	Ongoing for duration of DPEL	EA Programme Manager with Methods Engagement Lead / Delivery Manager	Escalation from client team if expected behaviour is not demonstrated	Measured against DPEL & Methods Lot 3 agreement.
2.	Regular checkpoints provided by Methods	Weekly reporting to ascertain delivery progress, key risks/concerns	Weekly	EA Programme Manager with Methods Engagement Lead / Delivery Manager	Regular project meetings	Measured against DPEL deliverables.



3	Delivery of agreed deliverables do not exceed agreed baseline dates outside of tolerance	Baselined plans detail agreed delivery dates, these will not be exceeded above tolerance without agreement between all parties	Weekly	EA Programme Manager with Methods Engagement Lead / Delivery Manager	Regular project meetings	Measured against DPEL deliverables.
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### Feedback and satisfaction

Business Area and Supplier to agree regular reporting intervals for the duration of the engagement. These are listed in the Service Delivery Document (SDD)

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.

## 6. Exit management

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

Describe what the supplier will produce upon existing the project engagement:  
Deliverables as set out in detail above with detailed knowledge transfer embedded and evidenced together with exit report on the engagement and recommendations for the future development of BEP.

### 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.



