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Defra Group Management Consultancy Call off Contract: Project Engagement Letter

Completed forms and any queries should be directed to Defra Group Commercial (DgC) at ████████████████████. Please do not complete this form until you have liaised with DgC, and they have allocated you a lot to access Consultancies within and subsequent reference number.

Engagement details				
Engagement ref #	DPEL_61538_019			
Extension?	N/A		**DPEL Ref.**	DPEL_61538_019
Business Area	Business Area [ENV - International Biodiversity and Climate, International Advisory Panel on Biodiversity Credits]			
Programme / Project	International Advisory Panel on Biodiversity Credits, Secretariat Team			
Senior Responsible Officer	████████████			
Supplier	KPMG			
Title	IAPB Consultation 2 Analysis			
Short description	This project will provide qualitative and quantitative analysis of the responses to IAPB's second consultation. Specifically, it will utilise tech-enabled natural language processing approaches to code, and analyse the results of the second consultation, and present the key insights and detailed findings in the form of an IAPB-branded report.			
Engagement start / end date	Proposed start date 09/05/2024		Proposed end date 13/06/2024	
Consultancy Spend approval reference	N/A			
Expected costs 23/24	£ N/A			
Expected costs 24/25	£ 83,500.00 + VAT			
Expected costs 25/26	£ N/A			
Dept. PO reference	Dept. PO reference # To be raised after the DPEL has been signed			
Lot #	Lot 1			
Version #	0.2			

Approval of Project Engagement Letter

By signing and returning this cover note, [ENV- International Biodiversity and Climate, International Advisory Panel on Biodiversity Credits, Secretariat] accepts the contents of this Project Engagement Letter as being the services required and agrees for [KPMG] to provide the services in accordance with the agreed Supplier Proposal under the overarching contract (Lot 1 - Ref 28595), with Defra Group and confirms the availability of funding to support recharge for the services.

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Signatures		
Supplier	**Business Area**	**Defra Group Commercial**

1. Background

Briefly justify why support is required:

The IAPB has just launched its second consultation which builds on the issues highlighted through the Call for Views and focuses on understanding the range of possible market models for biodiversity credits and the key features that could influence their success. The consultation will remain open until the 24th of May 2024. The consultation is public and involves over 20 questions, a mix of Likert-scale and open-ended type, which invite highly technical responses. Based on plans to increase engagement, there is an objective of gaining more than 100 responses to the second consultation. The IAPB Secretariat lacks the capacity to deliver consultation analysis within the time period available. Therefore, we are procuring a supplier to deliver this work for us.

2. Statement of services

Objectives and outcomes to be achieved

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State and describe the aims of the engagement:

A supplier is required to code and analyse the results of the second consultation based on a tech-enabled natural language processing approach, and to present the key insights and detailed findings in the form of an IAPB-branded report.

The supplier will start to develop and test the codes/labels with an initial set of responses, while the consultation is open, and agree this with the technical team in IAPB's Secretariat.

The supplier will provide thematic coding analysis with details of tabulated results and charts. This will include a database of responses to explore sentiment, facilitate efficient re-performing and allow for segmenting by respondent groupings.

Finally, the supplier will deliver an IAPB-branded report including key insights and detailed findings supported by respondent data, highlighting the breadth and themes raised across the second consultation. The supplier will deliver the final output within the period of five weeks.

Scope

Define the scope of the services *(SMART):*

The work will comprise of **two phases**:
Phase 1 - Analysis:
- Utilising the Supplier's technology team to leverage natural language processing to support in aggregating unstructured free text data for each question. The closed questions (e.g. Likert, single select etc) will be analysed based on respondent proportions to question options and presented as part of the analysis output. The analysis will generally be composed of tabulated results and charts presented via PowerBI (visualisation software) or Excel, ensuring that the team can explore the data in a self-serve manner following the project. These tables and charts will be used as primary inputs for the report. This helps deliver initial and interim outputs at an earlier stage, enhancing efficiency and accuracy and focussing subject-matter experts (SMEs) on interpreting and reporting the key messages, whilst also ensuring outputs are flexible to accommodate further analysis as required.
- Due to the timescales required for report drafting and publishing (3 weeks after the second consultation closes), the team will start to develop and test the thematic coding against an initial set of responses, while the consultation is still open. This will allow for smoother analysis once all the responses are in, when the consultation closes on the 24th of May.
- During this phase the SMEs (leading report team) will work with IAPB to agree the structure, format and requirements for the IAPB-branded report, so that a template is agreed before the consultation closes.

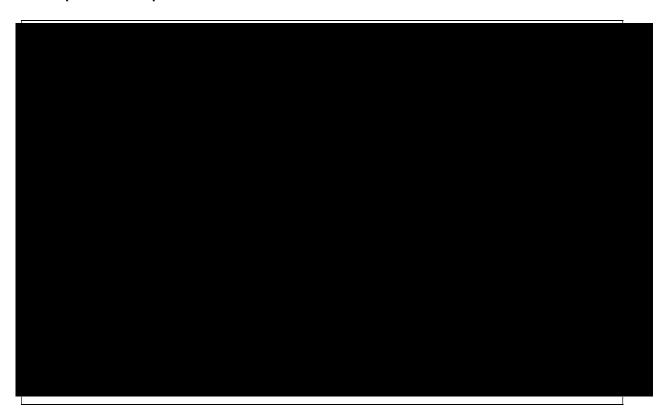**Phase 2 - SME analysis and reporting:**
- SME analysis will happen throughout the project, ensuring the outputs of the analysis align with IAPB technical team's expectations and are technically sound.
- SMEs will then use the outputs of the PowerBI dashboard to draft an IAPB-branded report to summarise the results of the consultation and allow the IAPB to publish.

Success will be measured by the completion of tasks referenced above to the high standards required, in line with the timetable set out below. The efficacy of the client-supplier relationship will also be tracked closely.

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The work will be completed by the 13th of June, with weekly check-ins, or more frequently as needed.

Assumptions and dependencies

Risk management

Provide further details of any foreseen risks with this project and how they could be mitigated:

Risk: The consultation responses are too broad or vague, and therefore deemed insufficient for conducting a thorough and accurate analysis based on a tech-enabled approach, or delivering a clear final product.
Mitigation: We will work closely with the supplier two weeks before the consultation closes on developing and testing the thematic coding against an initial set of responses. We will also work with the supplier on the structure and format of the IAPB-branded report, before the consultation closes, and help manage expectations around the final deliverables where appropriate.

Risk: Timelines are too tight to deliver the work in accordance with our expectations.
Mitigation: We will meet regularly with the supplier, i.e. on a weekly basis, to discuss progress and adjust deliverables' timelines within the original contract timeframe.

Deliverables

Describe what the supplier will produce:

We expect the supplier to provide the below products:
1. An overarching workplan, and regular progress updates
2. Thematic coding and IAPB-branded report templates

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3. A full review of the consultation responses
4. Draft and final IAPB-branded reports

Deliverable	Success Criteria	Milestone / Date	Owner (who in the delivery team?)
Project Stage A			
Overarching workplan and regular progress updates	Submission of a workplan, including a breakdown of deliverables, tasks/activities, deadlines and milestones and tasks' ownership/responsibility. Completion of regular progress updates meetings with the IAPB Secretariat technical team.	██████████	██████████
Project Stage B (additional stages can be added)			
Thematic coding and IAPB-branded report templates	Agreement on the coding categories with the IAPB Secretariat technical team, after conducting testing against an initial set of the responses. Agreement on the structure, format and requirements for the IAPB-branded report	██████████	██████████
Project Stage C (additional stages can be added)			
Full review of the consultation responses	Submission of thematic coding analysis with details of tabulated results and charts in excel or Power BI.	██████████	██████████
Project Stage D (additional stages can be added)			
Draft and final IAPB-branded report	Submission of the first draft and final reports in ppt, to be signed off by the IAPB Secretariat technical team.	██████████	██████████

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Deliverable	Success Criteria	Milestone / Date	Owner (who in the delivery team?)
		███████████	
Internal Capability Development Outcomes			
Social Value Outcomes			

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

Provide details of the agreed team members including their roles and responsibilities during the project.

Name	Role (link to stage/s resource will work on)	Grade	Daily rate	# of days	Cost
███████	███████	███████	███████	███████	███████

Name	Role (link to stage/s resource will work on)	Grade	Daily rate	# of days	Cost
██					
Total:				██████	£ 83,500

Total resource Total days* Engagement Length** *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 £83,500 inclusive of expenses and excluding VAT.

Provide costs for any particular stages to the engagement.

Stage	Cost	Due (link to milestone dates)
A - D		**DD/MM/YY**
A final set of thematic coding analysis with details of tabulated results and charts in excel or Power BI (discount applied to our typical fees reflecting discussions with IAPB). A final IAPB-branded report of the consultation responses.	£83,500	13/06/2024
Grand total	£83,500	13/06/2024

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

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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 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.

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

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KPI 1 - Reporting

1.1	The Supplier presents updates and reports required by the Business Area on time and includes required information.	Timetable of reports and updates as agreed in the Deliverables table above. List of reports and updates as agreed in the Deliverables table above. Other ad hoc report requests are included in this KPI unless agreed otherwise.	Weekly	Business Area contacts, as outlined above.	Performance tracked against deliverables table above.	Update reports are provided by required dates with the required information**.**
1. 2	All reporting and data provided to the Business Area is accurate and well evidenced. Should inaccurate reporting or data occur, this will be rectified with an explanation and updated reporting immediately upon discovery of any error.	This relates to errors that are 'material' and does not include grammar, spelling, formatting errors. Non-exhaustive examples include team availability inaccurately reflected in resource allocation, inaccurate risk reflection or risk outside appetite not identified for risk reports.	Weekly	Business Area contacts, as outlined above.	Track instances of outdated or incorrect information.	There are no instances of errors in the reporting of financial data or project delivery information provided to the Business Area.

KPI 2 – Engagement and Interaction with the Business Area team

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2	The Supplier will promptly respond to and resolve the Business Area's requests.	'Urgent' reflects queries where it is reasonably considered that an urgent response is required to mitigate a risk or issue to the programme or Defra. We will provide a named person and mobile contact number during working hours to be contacted for urgent queries. 'Routine' reflects standard queries at IAPB project level.	Weekly	Business Area contacts, as outlined above.	Track response rate	Requests marked Urgent: Acknowledgment of new urgent requests within 3 working hours. Agreed action or resolution plan within 1 working day. Routine requests: Acknowledgment of new requests within 1 working day. Agreed action or resolution plan within 3 working days.

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. Insert any additional NDA requirements here.

6. Exit management

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

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> Describe what the supplier will produce upon exiting the project engagement:
> A final set of thematic coding per question and a full review of the consultation responses with charts (spreadsheet or PowerBI).
> A final IAPB-branded report (in ppt)

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:

   ███████████████

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	• DPEL agreed • DPEL signed: Supplier, Dept and CO • Purchase Order number	• Work can start • Supplier can invoice for work

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