**DPS FRAMEWORK SCHEDULE 4: LETTER OF APPOINTMENT AND CONTRACT TERMS**

**Part 1: Letter of Appointment**

[Letterhead of Customer]

Dear Sirs

**Letter of Appointment**

This letter of Appointment dated [23/11/2021], is issued in accordance with the provisions of the DPS Agreement (RM6018) between CCS and the Supplier.

Capitalised terms and expressions used in this letter have the same meanings as in the Contract Terms unless the context otherwise requires.

|  |  |
| --- | --- |
| Order Number:  | [CCZZ21A38] |
| From:  | [Crown Commercial Services] ("Customer") |
| To:  | [BMG Research Ltd] ("Supplier") |

|  |  |
| --- | --- |
| Effective Date:  | [23/11/2021] |
| Expiry Date:  | End date of Initial Period [ 22/11/2023 ] End date of Maximum Extension Period [ 22/11/2024 ] Minimum written notice to Supplier in respect of extension: [ 30 days ] |

|  |  |
| --- | --- |
| Services required:  | Set out in Section 2, Part B (Specification) of the DPS Agreement and refined by: The Customer’s Project Specification attached at Annex A and the Supplier’s Proposal attached at Annex B; and |

|  |  |
| --- | --- |
| Key Individuals:  | For the Customer: **REDACTED TEXT under FOIA Section 40, Personal Information**For the Supplier: |

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|  |  |
| --- | --- |
|  | **REDACTED TEXT under FOIA Section 40, Personal Information** |
| [Guarantor(s)]  | N/A |

|  |  |
| --- | --- |
| Contract Charges (including any applicable discount(s), but excluding VAT): | N/A |
| Insurance Requirements  | As per Terms and Conditions of RM6018 |
| Liability Requirements  | **Suppliers limitation of Liability** (Clause **Error! Reference source not found.** of the Contract Terms); TBC |
| Customer billing address for invoicing: | **REDACTED TEXT under FOIA Section 40, Personal Information** |

|  |  |
| --- | --- |
| GDPR  | [complete Contract Terms Schedule 7 (Processing, Personal Data and Data Subjects] |
| Alternative and/or additional provisions (including Schedule 8(Additional clauses)): | N/A |

**FORMATION OF CONTRACT**

**BY SIGNING AND RETURNING THIS LETTER OF APPOINTMENT (which may be done by electronic means) the Supplier agrees to enter a Contract with the Customer to provide the Services in accordance with the terms of this letter and the Contract Terms.**

**The Parties hereby acknowledge and agree that they have read this letter and the Contract Terms.**

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**The Parties hereby acknowledge and agree that this Contract shall be formed when the Customer acknowledges (which may be done by electronic means) the receipt of the signed copy of this letter from the Supplier within two (2) Working Days from such receipt**

**For and on behalf of the Supplier: For and on behalf of the Customer:** Name and Title: Name and Title:

**REDACTED TEXT under FOIA Section 40, Personal Information**

Signature: **REDACTED TEXT under FOIA Section 40, Personal Information**

Date: 24/11/2021 **REDACTED TEXT under FOIA Section 40, Personal Information**

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**ANNEX A**

**Customer Project Specification**

Refer to Attachment 3 – Statement of Requirements

**1. PURPOSE**

1.1 Crown Commercial Service (CCS), a trading fund of the Cabinet Office (CO), may be referred to as the “Customer” throughout this document.

1.2 Crown Commercial Service (CCS) is inviting bids from research agencies for the continuous development and delivery of marketing campaign awareness tracking surveys to gain insight on 2021/22 and 2022/23 marketing campaign activity.

1.3 The Contract will be for a two (2) year period commencing upon Contract Award. There will be an option to extend the Contract for a further one (1) year term.

1.4 The Customer requires pricing for the option to extend the Contract for a further twelve (12) month term, commencing. This will be reviewed upon the expiry of the original Contract term and the Customer is under no obligation to take up the extension options. The option to extend is subject to budgetary approval.

**2. BACKGROUND TO THE CONTRACTING AUTHORITY**

2.1 CCS is the largest public procurement organisation in the UK. They help organisations across the whole of the public sector find the right commercial solutions for around £18 billion of spend each year (approximately 70/30 split between Central Government and WPS organisations). By helping organisations save time and money on the procurement of common goods and services, Crown Commercial Service can help deliver savings for the taxpayer.

2.2 As a trading fund of the Cabinet Office (CO), Crown Commercial Service also supports on implementing the UK’s public procurement policy and delivering government’s commercial policy priorities.

2.3 The areas of common goods and services Crown Commercial Service covers spans:

2.3.1 Technology: cloud, digital hosting solutions, network services, software and technology products and services.

2.3.2 Corporate solutions: travel, fleet, office solutions, financial services, marketing, communications & research and contact centres.

2.3.3 Buildings: facilities management, maintenance and repair, utilities and fuel and construction.

2.3.4 People: permanent and temporary staff (including clinical and educational staff), people services (such as apprenticeship training and learning & development) and professional services (such as consultancy and legal services).

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**3. Background to requirement/overview of requirement**

3.1 The Customer has identified a challenge in demonstrating the outcomes and impact of elements of its marketing and communications activities that are focused primarily on driving Crown Commercial Service brand awareness and increasing brand value.

3.2 The Customer is keen to continue with the current approach based on previous awareness research waves (wave 1 in 19/20 and wave 2 in 20/21) in 2021/2022 to evidence the contribution of our marketing activity (Prospect and lead generation) and their longer term effect in terms of “awareness of” and “propensity to use” Crown Commercial Service.

**4. definitions**

|  |  |
| --- | --- |
| **Expression or Acronym** | **Definition** |
| **CCS**  | **Means; Crown Commercial Service, the Authority** |
| **CG**  | **Means; Central Government** |
| **WPS**  | **Means; Wider Public Sector** |
| **CO**  | **Means; Cabinet Office** |
| **CCGs**  | **Means; Clinical Commissioning Groups** |
| **ALBs**  | **Means; Arm’s Length Bodies** |
| **NDPBs**  | **Means; Non Departmental Public Bodies** |

**5. scope of requirement**

5.1 The Supplier will be required to develop strategies and activities to support development and deliver the marketing campaign awareness tracking surveys to cover 2021/22 and 2022/23 marketing campaign activity.

5.2 The scope of the requirement extends to the following:

5.2.1 **Agree Sampling Approach;** The Supplier will be required to advise the Customer on the current sampling size and selection methods as part of this requirement and to optimise if required. The target audience will be selected from all sectors as outlined within section 6.8.

5.2.2 **Development of research questions;** The Supplier will work with the Customer to review the review the existing questions to ensure the questions set meets the needs and maintain consistency which will be delivered to the selected target audience in order to gain an insight to the overarching aim of driving Crown Commercial Service

brand awareness and increasing brand value.

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5.2.3 **Delivery of research survey;** to a pre-agreed audience in line with timescales below; The Supplier will work with the Customer to

agree the format of the survey which may include but not be limited to online, telephone, mail or focus groups:

5.2.3.1 Wave three (3) - Post Campaign Survey to be delivered by the end of March 2022

5.2.3.2 Wave four (4) - Mid campaign survey needs to be

completed by the end of September 2022

5.2.3.3 Wave five (5) - Post campaign survey needs to be

completed by the end of March 2023

5.2.3.4 Please note, firm dates will be agreed between the

Supplier and the Customer following Contract Award

5.3 Analysis and Evaluation Reports; Post survey reports containing an evaluation to be delivered after each wave of research.

5.3.1 The Supplier is required to work with the Customer to develop the best format for the analysis and evaluation of findings. However a suggested approach is for the Supplier to deliver a summary and analysis of their findings using an Excel document, pdf or csv of raw data results and the creation of a PowerPoint presentation.

5.4 The Powerpoint presentation is to be delivered at the end of each survey period.

5.5 Door to door delivery of surveys is out of scope for this requirement.

**6. The requirement**

6.1 Suppliers are required to provide pricing to the Customer for the design, development, delivery and analysis of marketing campaign awareness tracking surveys to cover 2021/22 and 2022/23 activity and any extension options if taken up. Please see timelines for this requirement outlined in section 5.2.3.

6.2 The Customer requires pricing for the following:

6.2.1 Agree Sampling Approach; Whilst the Customer is happy to provide some Crown Commercial Service Contacts, the Supplier will be

required to provide pricing for the availability of contacts that do not have a relationship with Crown Commercial Service. The Supplier will work with the Customer to agree how data will be stratified

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across key target audiences (if required) and sources of audience data.

6.2.1.1 The Supplier will be required to further discuss sampling during the Inception meeting. The Customer has access

to the following customer contact data that can be made

available to the Supplier following Contract Award if

required.

6.2.1.2 Schools (3086 records)

6.2.1.3 Scotland (1563 records)

6.2.1.4 Northern Ireland (607 records)

6.2.1.5 Wales (1241 records)

6.2.1.6 Health (2713 records)

6.2.1.7 Local Government (4761 records)

6.2.1.8 Universities & Colleges (1381 recipients)

6.2.1.9 Charities (850 records)

6.2.1.10 Housing Associations (573 records)

6.2.1.11 Emergency Services (Police, Fire and Rescue) (914

records)

6.2.1.12 Central Government (including ALBs and NDPBs) (14095 records)

6.3 Development of research questions;

6.3.1 As part of this requirement, the Customer require surveys to contain a minimum of twelve (12) **multiple choice** questions per survey per wave.

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6.3.2 The Customer requires the Supplier to use lessons learnt from initial surveys to improve subsequent surveys carried out within the term of the Contract and any optional extension periods if taken up.

6.3.3 As part of this requirement the Customer wish to gain an understanding of public perception and experiences of Crown Commercial Service looking at topics outlined below. The Supplier will be required to design, develop, deliver and analyse their research (but not limited to) the following areas;

6.3.4 **Awareness**

6.3.4.1 How much awareness does the target audience have of who Crown Commercial Service are, what Crown

Commercial Service do and how they can help?

6.3.5 **Media consumption**

6.3.5.1 The Customer wishes to understand the sum of

information and media taken in by potential customers;

6.3.5.2 What publications do the target audience read?

6.3.5.3 What are the most popular social media channels? 6.3.6 **Key Touchpoints**

6.3.6.1 What are potential customers looking for and what do they need from the Crown Commercial Service?

6.3.7 **Creative messaging**

6.3.7.1 Which marketing campaign messages resonate / are of interest the most, and why?

6.3.8 **Brand association and affinity**

6.3.8.1 What do potential Customers think of Crown Commercial Service?

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6.3.9 **Current / future usage propensity**

6.3.9.1 Who currently uses Crown Commercial Service?

6.3.9.2 Would they consider using Crown Commercial Service in the future?

6.4 As part of their bid submission Suppliers are required to demonstrate how their proposed approach will help to meet the challenges set out in these requirements.

6.5 Suppliers should show how their approach will help to satisfy key stakeholders including the Crown Commercial Service Board and the Government Communications Team, both of whom have responsibility for approving future spend.

6.6 6.6 Delivery of research survey

6.6.1 The Supplier is required to deliver pre/mid and post campaign surveys to a pre-agreed audience using the sectors and job

functions/types below. The Supplier will work with the Customer to agree the format of the survey which may include but not be limited to telephone, mail or focus groups:

6.7 The Customer’s target audience by sector for this research project is as follows:

6.7.1.1 Local Government

6.7.1.2 Health (NHS Trusts, Ambulance Trusts, CCGs)

6.7.1.3 Schools and Academies including multi-academy trusts 6.7.1.4 Colleges of Further Education and Universities

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6.7.1.5 Devolved Administrations

6.7.1.6 Emergency Services (Police, Fire and Rescue)

6.7.1.7 Housing Associations

6.7.1.8 Charities

6.7.1.9 Central Government, Arm’s Length Bodies and Non Departmental Public Bodies

6.8 The Customer’s target audience by job functions/titles includes (but may not be limited to):

6.8.1.1 Procurement/Purchasing Leads/Managers (e.g.

Commercial Directors, Commissioning/Procurement

Managers and Head of Procurement)

6.8.1.2 Finance Directors/Managers

6.8.1.3 Chief Executive Officers

6.8.1.4 Business/Office Managers (Schools and Charities only) 6.8.1.5 HR Directors/Managers/Staffing Managers

6.8.1.6 IT Managers/Chief Technology Officers

6.8.1.7 Estates/Facilities Managers/Energy Managers

6.8.1.8 Marketing/PR/Communications Managers

6.8.1.9 Administration Managers

6.8.1.10 Legal Services Managers

6.8.1.11 Transport/Fleet Managers

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6.9 Reporting provisions

6.9.1 The Customer requires a written report to be delivered electronically within two (2) weeks of the end of the fieldwork of each stage of the pre/mid and post survey campaigns.

6.9.2 The outputs of the research shall include the following:

6.9.2.1 A summary report detailing the outcomes of the research undertaken;

6.10 Presentations

6.10.1 In addition, a presentation of each stage of survey results is required by the Customer within two (2) weeks of the end of the

fieldwork of each stage. The format and delivery of each

presentation is to be agreed between the Customer and the

Supplier. The Customer does not require presentations to be face

to face, conference or video call presentations will be accepted by

the Customer, however should the Supplier choose to deliver the

presentation face to face, this will be at the Supplier’s own expense. 6.10.2 The content of each presentation will include:

6.10.3 Insights,

6.10.4 Learnings and;

6.10.5 Recommendations

**7. key milestones and Deliverables**

7.1 The following Contract milestones/deliverables shall apply:

**Milestone/**

**Deliverable Description Timeframe or Delivery Date**

**1 Contract Inception Meeting to be held; Within one (1) week of Contract Award;**

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**Supplier to provide detailed project plan to**

**2**

**ensure delivery of pre campaign survey to**

**agreed timeline;**

|  |
| --- |
| **Supplier to have created draft version of the third wave of the survey for the Customers approval** |
| **Completion of Wave (3) Survey fieldwork;**  |
| **Delivery of Wave three (3) report and presentation;** |

**Within week one (1) of Contract Award;**

**3Within week 3 of Contract Award;**

**4 Within week four (4) of Contract Award;**

**Within two (2) weeks**

**5**

**6Fieldwork for remaining polls to be carried out at agreed dates;**

**8. MANAGEMENT INFORMATION/REPORTING**

**of the end of the pre campaign survey fieldwork.**

**Within weeks 6 - 52 of Contract Award**

8.1 As part of the reporting requirement, the Supplier will be expected to provide progress reports to the Customer via email against agreed work milestones. This will be sent no later than three (3) working days before Contract Review Meetings as detailed within Section 10 Continuous Improvement. The Supplier will be required to keep regular contact with the Customer via telephone as and when required.

**9. continuous improvement**

9.1 The Supplier will be expected to continually improve the way in which the required Services are to be delivered throughout the Contract duration.

9.2 The Supplier should present new ways of working to the Customer. This will be carried out as part of three (3) Contract Review Meetings scheduled at the end of each survey period.

9.3 Changes to the way in which the Services are to be delivered must be brought to the Customer’s attention and agreed prior to any changes being implemented.

**10. quality**

10.1 The research and analysis will inform the delivery of the Customer’s hard marketing metrics (lead generation and digital platform registrations) and their longer term effect in terms of “awareness of” and “propensity to use” CCS. Therefore it is critical that the project runs to time, with all assumptions and caveats clearly highlighted.

10.2 This project will inform the methodology developed by the Customer and all the outputs and related materials should be of a high quality and publishable standard.

**11. PRICE**

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11.1 The budget per annum is £50,000 (excluding VAT). The Customer reserves the right not to take up extension options which are subject to budgetary approval.

11.2 Suppliers should set out the number of Contacts they have in each sector and job function/title as set out within Section 6 – The Requirement. Costs should be provided for the following activities:

11.2.1 Survey development and set-up;

11.2.2 Project management;

11.2.3 Provision of pre/mid and post survey activity;

11.2.4 Reporting and presentation of pre/mid and post survey results; 11.2.5 Any additional costs associated with Contract;

11.3 The Price Evaluation will be based on costs for the total contract term (including extension options).

11.4 The price evaluation will seek to achieve an average cost based on 500 respondents as an overage of the following anticipated respondents:

11.4.1 **Cost Element One (1):** Up to 200 respondents (Including all other costs);

11.4.2 **Cost Element Two (2):** Up to 400 respondents (Including all other costs);

11.5 Suppliers must include a cost for the average of 500 respondents which will form the evaluation.

11.5.1 Suppliers are required to provide costs for all cost elements up to 800 respondents identified within the Attachment 4 – Price

Schedule (Respondents tab) for information purposes only.

11.6 Prices are to be submitted via the e-Sourcing Suite Attachment 4 – Price Schedule excluding VAT and including all other expenses relating to Contract delivery.

**12. STAFF AND CUSTOMER SERVICE**

12.1 The Supplier shall provide a sufficient level of resource throughout the duration of the Contract in order to consistently deliver a quality service.

12.2 The Supplier’s staff assigned to the Contract shall have the relevant qualifications and experience to deliver the Contract to the required standard.

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12.3 The Supplier shall ensure that staff understand the Authority’s vision and objectives and will provide excellent customer service to the Authority throughout the duration of the Contract.

**13. service levels and performance**

13.1 The Authority will measure the quality of the Supplier’s delivery by:

13.1.1

**KPI/SLA Service Area KPI/SLA description Target 1 100%**

|  |  |
| --- | --- |
| **Service** **Delivery** | **Pre/mid and post campaign surveys to be agreed with the Customer, signed off and delivered within the** **timescales outlined within Section 6.1.** |
| **Service** **Delivery** | **Pre/mid and post campaign reporting provisions to be delivered within two (2) weeks of the end of the fieldwork for each survey.** |

**2 100%**

**3 Service Delivery**

**Pre/mid and post campaign presentations to be presented to the Authority within two (2) weeks of the end of the fieldwork of each survey.**

**100%**

13.2 In the event of the first poor performance through the failure to deliver KPI’s to time and of appropriate quality, the Customer shall meet with the Supplier to understand the root causes of the issue. The Supplier shall formulate a Performance Improvement Plan to rectify these issues and meet the requirements in this statement.

13.3 If poor performance continues, following formal written warnings, early termination of the Contract will also be considered.

**14. Security and CONFIDENTIALITY requirements**

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14.1 Any data provided by the Customer shall not be used or shared with colleagues that do not work on the project, and shall be owned by the Cabinet Office (CO). It will become officially sensitive upon receipt and shall be treated as such.

**15. payment AND INVOICING**

15.1 The Customer will make payments in three (3) instalments over the Contract following delivery of results for each poll.

15.2 Payment can only be made following satisfactory delivery of pre-agreed certified products and deliverables.

15.3 Before payment can be considered, each invoice must include a detailed elemental breakdown of work completed and the associated costs.

15.4 Invoices should be submitted to: supplierinvoices@crowncommercial.gov.uk **16. CONTRACT MANAGEMENT**

16.1 Attendance at Contract Review meetings shall be at the Supplier’s own expense.

**17. Location**

17.1 The location of the Services will be carried out primarily at the office(s) of the Supplier. Occasional travel to Customer’s offices in Liverpool or London may be required. In addition, team members may be required to travel to other locations within the UK in order to fulfil the requirements of the brief. No associated claim for T&S shall be paid by the Customer.

17.2 Crown Commercial Services Head Office address is as follows: 151 Buckingham Palace Road,

Victoria,

London,

SW1W 9SZ

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**ANNEX B**

**Supplier Proposal**

To be inserted post award

4.1 Our Approach and Methodology Introduction BMG Research have been delighted to work with Crown Commercial Service over the last two years to deliver your marketing campaign awareness research. We are familiar with your requirements and bring a strong understanding of what has worked well and where improvements could be made. We are therefore uniquely placed to apply this learning to the next phase of the research. Our approach will provide continuity with the previous surveys while embedding improvements designed to maximise the value that the research delivers to you and your stakeholders. Our recommended approach is outlined within the remainder of this section – with further detail supplied in other sections as requested. We outline our understanding of your challenge, how we would approach this methodologically, and specifically how we would ensure the sample is representative and effective. Meeting your challenges As the largest public procurement organisation, the Crown Commercial Service provides a diverse range of products, across the broad groupings of ‘buildings’, ‘corporate solutions’, ‘people’ and ‘technology’ with procurement solutions covering many different services. The breadth of your work means that you are aiming to reach a diverse range of organisations across different areas of the public sector and potentially a range of individuals within each organisation making decisions on procurement solutions. Crown Commercial Service also plays a key role in implementing government procurement policies and priorities, for example Net Zero and social value and procurement expertise is a core element of the ‘brand offer’. The Covid-19 pandemic presented unprecedented challenges for public procurement with urgent demands for products, staff and technology to help tackle the impacts of the pandemic, requiring very large-scale procurements needing to be delivered in an agile and flexible way. As your Chief Executive Simon Tse noted in Civil Service World, CCS agreements played a vital role in the public sector response to the pandemic. As a result of the pandemic, organisations’ expectations and needs for procurement services may have shifted and the channels through which marketing activity may reach them may also have changed. Your organisation continues to exist within a highly competitive market. Organisations have a range of choice of framework and procurement channel available when procuring suppliers and services. This is a hard choice for many of them as they simply may not know the best approach - and the decision is often made by individuals on a case by case basis and often with them having had to call you, or a competitor, to ask for advice. Your long-term success depends on being the first organisation anyone making a procurement calls – ensuring you don’t miss opportunities to work with them, and that you get the chance to advise and guide their briefs so that procurement through you is highly successful and becomes the norm. This is not easy. You need to build relationships with a hugely wide and diverse customer base and drive their loyalty, but also continuously acquire new customers. Usage can be infrequent, potential customers may already know you - but many will not. An effective marketing campaign is a prerequisite to be successful, but is a challenge in its own right – the campaign messaging and material must be effective across the range of roles to convince customers; you need the right media strategy to reach the target audience; and you are required to prove that the marketing investment is delivering ROI to stakeholders who could invest that budget elsewhere. The most recent survey we conducted for you in Autumn 2020 showed that CCS is increasingly recognised for its procurement expertise and that the sector 2 specific focus of marketing activity appeared to be showing positive results but challenges still remain in increasing brand awareness and perceptions across some sectors. Our original approach was designed to meet the following needs which we identified. Our experience of delivering the programme to date is that these still represent the core needs of this programme. • Robust, reliable data: That the data you receive and base your decisions is right should be a basic hygienic - you should be able to invest and assess marketing safe in the knowledge that decisions made were right and based on accurate and correct information. Our programme management processes and quality suite minimise risk and ensure you will not be making a bad investment based on inaccurate data. • Feedback from the right people: Your target customer base is large and diverse in sector and role. They are also busy, time poor and many will not be office based. Any marketing insight programme must provide a representative view of this customer base so you can trust your decisions – whilst including sufficient numbers of all groups to allow targeted analysis. Our sampling approach (below) is designed to

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achieve exactly that. • Measure the right aspects: This programme requires a range of KPIs and metrics. You need to understand your customers through the lens of the marketing funnel (awareness to usage), develop an effective measure for brand value that can be conveyed to senior stakeholders and takes the competitive context into account and measure campaign performance directly. We have a range of simple, yet accurate measure we can apply to the programme to assess the campaign performance, and measure brand value within a competitive context that we will deploy on this programme. • Demonstrate ROI to stakeholders: The research programme must identify how the marketing campaign has changed awareness and attitudes. Critically, it must also demonstrate that it has led to increased use of CCS and digital registrations. We will integrate behavioural, attitudinal and perception measures into the programme so we can identify the ROI and develop the business case for stakeholders to continue to invest in marketing. • Actionable insight to a range of users – The research programme must guide the decisions and thinking of the CCS marketing team. It must also deliver actionable insight to your media partners – creative agencies and media buyers. We will achieve this through our range of deliverables for different users and through actively participating in workshops and other media planning forums to guide each party. • Cost effective and efficient: The research programme must be delivered at a low absolute cost to you – minimising expenditure. It must also require only a low amount of your time to allow you to work on other tasks. We provide a full service through the whole programme and our programme management mean you remain informed and in-control without needing to actively manage us. • Enhance your reputation: This survey will touch many of your customers and prospective customers so they must find it an enjoyable experience and one that makes them feel you respect and care for them. We will avoid oversampling and use a positive interview experience to deliver this. • Continuity: continuity with the previous approach used will enable us to compare results over time. 3 Our recommended approach Having considered whether a change in the methodology should be introduced, we believe that an online self completion survey still presents the optimal methodology. We recommend this approach for the following reasons: • Flexibility for respondents: Participants can complete the surveys at a time of their choosing. The survey is also mobile enabled so it can be completed on a laptop, tablet or phone as the participant prefers. • Flexibility of question styles: Online surveys can utilise a range of question types – and enables us to show marketing materials to participants to gauge their recollection if appropriate. • Speed of interview: Online surveys are easier and quicker to complete – so take less time and are less onerous for participants. • Data quality: Online surveys use routing to ensure participants answer the right questions and all the questions they should. This means the data is always clean – unlike postal surveys which need a separate data cleaning phase. • Highly cost effective: The cost per survey is low so reducing your spend, enabling us to achieve your desired sample sizes within budget. A key challenge with the previous surveys was low response rates. While an online survey will have lower response rates than a telephone approach, we are confident that the response rates can be improved, primarily through improving sample quality as we discuss below. The steps that we will take to maximise the survey response rates will include: • Tailored survey invitations that clearly emphasise the benefits of taking part. For your existing contacts this will be positioned as enabling CCS to better understand your customer base and provide a better service to them. For new contacts we suggest that the invitations emphasise that CCS wants to understand the procurement needs that public sector organisations have and how they can best be met. This messaging will also be emphasised on the survey landing page. • Invitations sent directly via email to the email addresses in the sample so that individuals receive a unique survey link and facilitating close monitoring of response rates. We again recommend that the invitations have CCS branding so that recipients can be confident that this is a genuine survey. • Close monitoring of response at each stage so that we understand where issues may be arising (for example monitoring numbers of bouncebacks, visits to the survey landing page). • Reminders sent to invitees who have not completed the survey. We will send up to two reminder emails, varying the messaging in each contact to encourage response. • Soft launch of fieldwork to test the response rate and quality of sample. Sample and Sampling Our experience of delivering the surveys to date has been that the sample quality, particularly for non-customers was less than optimal and a key point of learning was that alternative sources of sample should be identified. We have assumed that the sample for each wave will again consist of a mix of existing contacts provided by CCS and new contacts which we will supply. 4 Our proposed approach is to utilise the contact directories available from Oscar Research who are an established provider of contact databases across the public sector. Oscar have databases for all sectors of interest to CCS with the exception of charities so we will discuss with you on commission the most appropriate solution for obtaining a sample of charities. We have based our

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costs on this approach but will agree the exact approach with you on commission and are happy to consider other sources of sample you may wish to recommend. We propose to use the process we established at the previous wave using a secure transfer protocol for secure transfer of sample from

CCS in an agreed proforma. We recommend refreshing the sample each wave (pre/mid/post) to ensure anyone who has been added can be included within the sample, and anyone who has been removed since the first wave. The sample for each wave of the survey will be selected at random from a stratified sample matrix. As with the previous surveys, we anticipate that the key sample mix elements are the sector and role within that. We would therefore build a sample matrix that crosses these two elements and identifies the number of contacts within each of these sample cells. Due to the high proportion of your contact base that is from Central Government (14095 - 44%) we will not just sample the customer base in proportion to the sample numbers. If we did that, we risk having a sample that is heavily skewed towards Central Government and the opinions of other sectors are not gathered in sufficient detail for sub-analysis and some groups may not be covered. Instead we would develop an asymmetrical sample design to ensure the programme covers the customer base. To achieve this, we will work with you to set minimum numbers of interviews for each sample cell. We will then target that many interviews as a minimum for each – but these may not exactly reflect the proportion of the total available customer sample that that groups covers. We anticipate that some cells will be more important to you than others due to their frequency of use, spend and volume of contacts so will set different minimums according to how important each group is. We will agree the exact split between CCS supplied sample and new contacts for each wave and suggest a broad 2:1 ratio, providing sufficient sample for comparison of each group with sufficient depth within your contacts. We will deduplicate the external sample against CCS contacts to ensure that the external sample is comprised of genuinely new contacts. Once the data has been collected, we will apply weighting factors to the data that mean it is representative of the total sample supplied. We will use a weighting matrix approach, based on the same sample mix elements as the sample was selected through i.e. role and sector. This approach will mean that for analysis, you will be able to look at the data overall, by role (combining sectors) and by sector (combining roles) and always have a representative view. It will also protect data quality by preventing 1-2 individuals in a small cell heavily skewing that cell’s results. We will only use as much sample as is required to complete the target number of interviews. We will base our design on an anticipated response rate of c.5% overall based on our experience of the surveys to date and assuming that sample quality will be improved from the previous surveys. We will use the response rates for each sector from the previous surveys as a guide to the relative response rates we can expect to achieve. This will be tested in the soft launch and as the programme progresses we can amend by sample cell to minimise the number of customers who are invited.

4.2 The Exact Specification Introduction We recognise that you need a solution that is not only effective in its conception, but is also well conceived and planned at a detail level. We have based our specification on our experience of delivering the surveys to date, ensuring that we can retain elements of the approach that have worked well and build in improvements using learning from the previous surveys. Within this section we will address three key areas: 1. the actual number of interviews that we recommend for each wave – and our rationale; 2. the questionnaire structure we would recommend to make this programme effective; and 3: the analytical groupings and sub analyses that we intend to use to deliver impactful findings that guide your marketing campaigns. Sample size Our recommended number of interviews is a balance to provide sufficient volume of data to accurately understand and manage the performance of your marketing activity and the need to minimise the number of times each of your customer contacts are invited to participate – ensuring reliable results and the long-term sustainability of the research programme. We have also taken cost into consideration, but it is important to note that our operating model means that the incremental cost of an online interview is small when using customer contacts provided by yourselves and the pricing arrangements for the external provider also have only a small incremental cost. The previous two surveys achieved sample sizes of over 900 per wave. This has proved sufficient to conduct analysis by sector and role as well as comparisons between existing customers and non-customers. We therefore recommend targeting the following sample sizes for each wave: •

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Pre: 1000 • Mid: 500 to course correct during the campaign • Post: 1000 Our rationale for these sample sizes is as follows: • 1000 pre and post interviews to provide a robust baseline and also a robust read of the impact of the campaign. These sample sizes also allow for statistical modelling to calculate the ROI of the campaign for evidence to stakeholders. • The ‘mid’ sample is lower as we expect you will have limited ability to change the marketing mid-campaign. The mid survey therefore acts as a pre-read/early warning on the campaign performance. As such it will be subjected to less in-depth analysis and can be effective at a smaller sample size. • This number of interviews requires an overall response rate of 7% - which we believe to be easily achievable • The margins of error within these sample sizes are small – 3% for pre and post and 4% for the mid at 90% confidence. The decrease in margins of error diminishes as sample sizes pass 500, so increasing the sample sizes significantly beyond the recommended levels will have limited benefit to the margins of error 2 • We believe these sample sizes will be sufficiently large to allow us to analyse the subgroups outlined below in sufficient detail, and cover all the key sample cells outlined in the ITT. We realise the importance of protecting your customer relationships throughout the fieldwork. Therefore, any customer who wishes to complete the survey during the fieldwork period will be able to do so and we will use their data in our analysis. If we did not do this, we risk damaging your customer relationships as the person takes the time to support you with their perceptions, only to find that they cannot complete the survey and feel snubbed. Our targeted number if interviews is based upon fully completed interviews i.e., interviews where the respondent has answered every question expected of them taking into account any routing. In any online self-completion survey, there will be a significant number of people who begin the survey but fail to complete it. We are able to include the responses from each of these people in our analysis if we wish. We recommend that, once the questionnaire is finalised and we have initial data, we decide with you a point in the questionnaire at which a respondent’s data can be included in the final dataset. Once agreed, we will include data from incomplete participants who have passed that point in our analysis. These responses will be in addition to the targeted completes outlined above. We will identify the appropriate point with you based on a point in which the questionnaire where the questions answered make the response useful for analysis, and on the points in the questionnaire at which participants tend to drop out. The questionnaire We recognise that the questionnaire will need to evolve to ensure it captures relevant aspects of CCS marketing campaigns. In particular, one reflection from our previous surveys was that more ‘why’ questions may be helpful for better understanding what drives satisfaction and perceptions. We will carry out an initial review of the questionnaire used at the previous wave with you to identify questions that should be retained, questions no longer needed, potential changes to questions and new questions which should be added. We recommend doing this in a virtual workshop format including your internal stakeholders where possible so that there is buy-in and consensus at the design stage and the questionnaire can be agreed in a timely way. We have mapped the key areas of interest identified in the ITT against the current questionnaire to help identify where additional content may be useful, in the table below. Topics Current questions Potential new questions Awareness How much awareness does the target audience have of who Crown Commercial Service are, what Crown Commercial Service do and how they can help? • Awareness of public buying organisations including CCS • Awareness of services offered by CCS Media consumption • What publications do the target audience read? • Publications • Social media channels • Refresh lists to ensure all relevant publications/ channels included 3 Topics Current questions Potential new questions • What are the most popular social media channels? Key Touchpoints What are potential customers looking for and what do they need from the Crown Commercial Service • Satisfaction with PBOs used (including CCS) • Likelihood of recommending CCS • Importance of different considerations when choosing a PBO to use (e.g., savings, social value, ease of use) Creative messaging Which marketing campaign messages resonate / are of interest the most, and why? • Campaign awareness • Channel • Ratings for relevance, believability, difference • Follow-up question to ask why campaigns considered relevant; • Consider rating by different aspects

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Brand association and affinity What do potential Customers think of Crown Commercial Service? • Perceptions of CCS alongside other PBOs • Review statements to ensure all aspects of CCS brand covered Current / future usage propensity • Who currently uses Crown Commercial Service? • Would they consider using Crown Commercial Service in the future? • Whether used CCS • Whether would consider CCS in future • If would not consider, why is this • Follow-up question for those who would consider using CCS to ask which products/ services they might be interested in In addition, we recommend retaining current questions on organisation metrics, respondent role in the organisation and decision-making capacity. We are confident that one additional open-ended question and 2-3 multi-choice questions could be added to the existing questionnaire without significantly increasing the questionnaire length (currently estimated average of 10 minutes), causing increased drop-off or increasing costs. Demographical and Sector Breakdowns We work closely with our clients through the programme to ensure we provide the analysis they require for their organisational needs. We focus on delivering insightful outputs with actionable recommendations they can deploy to enhance the performance of their organisation. This means we do not charge our clients according to their analytical needs – but focus on what deliverables they need. We also understand that your needs may change and will adapt with you to change the analysis we provide, and the breakdowns within that, accordingly. However, as a basic starting point we guarantee we will look at any data through the following breakdowns. Analysis will be undertaken using these breakdowns for each of the waves of the survey. 4 Demographic breakdowns: 1. Overall: Reviewing the results at an overall level identifies the overarching results and shows how the marketing campaign is performing and impacting at CCS at an organisational level. 2. By sector: This will demonstrate whether the campaign Is performing evenly across all sectors – or if there are specific sectors where it is stronger or weaker. 3. By role: This will identify whether the campaign Is performing evenly across all job roles – or if there are specific roles where it is stronger or weaker. We would also examine the roles according to whether the respondent is a decision maker, influencer or end-user. For both the sector and role analyses we anticipate that there will be some commonalities within the breakdowns. We anticipate that it may be best to group up some of the most granular/smallest groups for more robust analysis. In this instance we would work directly with you to establish which groups make most sense – either due to similarities in the types of role/sector or due to organisational responsibilities within CCS. 4. By reaction to the campaign: We would use the responses to questions on the actual campaign to identify and group those who have been most, and least impacted. Examining the data through these breakdowns will enable us to identify any common groups or segments that are being appealed to, or not engaging with the campaign. By understanding this we are then able to explore any underlying strengths or weaknesses of the campaign that can be used to enhance performance – either through increased prominence, or through corrective action.

4.3 Delivering and Sharing the data gathered Introduction BMG Research prides itself on developing and producing clearly communicated and actionable findings, both in verbal presentations and in written reports. We place importance on producing documentation that is thorough and comprehensive, clear, interesting and relevant, whilst also being accessible for audiences who may not be research literate. We dedicate ourselves to reducing large volumes of complex data to its core messages in a concise and easy-to-read fashion, including the use of appropriate graphics and tables. We also ensure that our reports go beyond simple narrative descriptions of data, and that they incorporate insights and comparative information that puts the results into context. We have worked closely with you to deliver the reports for the two previous waves of the survey and as such have a detailed understanding of the insight that you and your stakeholders need from the survey findings. We recognise that the programme must meet the needs of a wide range of stakeholders – convincing senior stakeholders, guiding the campaign and giving media and other partner agencies what they need to maximise campaign performance. Achieving this requires us to develop the right

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outputs and deliver and share them through the correct platforms and channels. We therefore propose that the outputs for each wave consist of: • Data tables setting out the results for each question by agreed breakdowns (for example, sector, role, awareness of CCS). • A full report of the survey findings delivered as a PowerPoint slide deck and consisting of a mix of charts, tables and text. • A presentation of the findings to your stakeholders. • An online dynamic reporting portal containing all data tables and PowerPoint reports. This gives you the ability to interrogate your data using a drag and drop function and to create native PowerPoint charts direct from the raw survey data. Focusing on your needs and delivering to stakeholders We realise that impactful insight and effective reporting occurs when we focus on the issues that matter most to you and address your actual questions. We ensure this by undergoing a thorough review process with the programme stakeholders to review how they will use the research findings, what decisions they will make on the basis of it and any ‘action standards’. We will use the report from the second wave of the survey as a starting point to understand how stakeholders have used the findings, what they found useful and what could be improved. We will summarise this back through a single document outlining: • Your Core Question – the key business/organisational objective you are attempting to tackle e.g. increased participation in energy saving activity. • Your Business Questions – the main questions you need to answer to tackle your Core Question e.g. Why don’t people participate, what would encourage them to do so, what would be the best communication channels? • The research/data questions – the analytical questions that must be answered to solve the Business Questions. 2 This framework will be shared with you to ensure everyone is satisfied it accurately describes your needs. It then provides a framework through which we are able to design your questionnaire or discussion guides and also approach our analysis – focussing on answering the specified questions and giving you clear answers to each. Going ‘back to basics’ on the research questions in this way will ensure that our outputs are focused on your current needs and not just repeating what we have done before. When reporting, we are able to use this framework to tailor the outputs – headline findings focussed around the questions for each element for summaries, and more detailed responses for those who need the detail. Analytical Techniques To inform the content of a report, we use multi variate statistical techniques to bring greater depth of analysis. This includes regression–based key driver analysis to identify the key factors leading to positive and negative perceptions of the campaign and cluster analysis or other segmentation techniques to identify the characteristics of sub-groups of customers in respect of their views of the marketing activity. The previous report used regression analysis to identify the key drivers of satisfaction with CCS and of advocacy. We would recommend repeating this analysis to provide greater understanding of customer needs and also to understand any changes over time. We will also include analysis of change over time to enable understanding of how your campaign activity is potentially driving levels of awareness and engagement. Report contents and formats Our reports include as a minimum, an executive summary, an introduction, methodology, analysis of all questions, significant demographic differences, recommendations on service areas for improvement and a sample profile. The structure and content of the report is discussed with you in advance of production to ensure that it meets clients’ requirements. The report is illustrated with colour graphics where appropriate and questionnaires are appended. Producing the report in PowerPoint enables us to maximise the use of graphics within the report so that stakeholders can quickly grasp key findings but we are happy to prepare the report in an alternative format such as Word if this is preferred. 3 We suggest structuring the report as before around the marketing funnel, taking the analysis through from awareness, to use, satisfaction and finally advocacy. We will also be happy to present the findings from each wave to your stakeholders. Presentations will be led by senior members of the research team who have been closely involved with the project. We will agree the content and format of presentations with you in advance. Integrating back data We view the programme as one programme with multiple waves, not a series of smaller programmes. Therefore, we design the reporting and data to grow over time. Each report will contain appropriate backdata from previous

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waves so that you can see how scores, metrics and performance develop over time. We will include each wave’s data into any datasets delivered so that you always have one single data file to work with, not one per wave.

5.1 Contract Management Introduction We understand the importance of effective contract and programme management. We pride ourselves on our successful delivery on programmes across a wide spectrum of client needs, specifications, approaches and methodologies. Much of this is down to our careful planning, programme management and governance processes. In this section we outline the core elements of these, alongside our initial timings and milestones plan. Contract management We have robust procedures for contract management with clear responsibilities and governance processes. Simon Wood (Head of Research) will be your Account Lead with overall strategic responsibility for the study. Simon will ensure that the research fully meets your requirements and quality standards. Vicky Clarke, Research Director at BMG will be the Project Lead and your primary contact, working closely with you throughout the contract. Vicky will be supported by Lucy Hallam (Research Manager) and Sara Suarez (Senior Research Executive). Vicky and Sara’s close involvement with the previous waves will ensure that there is continuity in approach and the team can hit the ground running. We recognise that this project will require a flexible and agile approach which will be underpinned by regular communication. We will hold an inception meeting as soon as possible after commission to agree the detailed approach, confirm timelines and agree ways of working. We then propose to hold weekly catch-up meetings to update on progress throughout the project (using Teams or your preferred video-conferencing software). We will provide written updates by email in advance of these meetings. We also expect to be in frequent informal contact by email and telephone as required. At the end of each wave we will hold a project review meeting with you to cover what went well, and what can be learnt for future in every aspects of the programme from questionnaire, through fieldwork, and into reporting and delivery – and including how we well we worked with you. Project Management Approach Delivery of this project will be underpinned by BMG’s tried and tested approach to project management. BMG successfully runs many large and small-scale research and evaluation studies in any one year – with an average of between 50 and 100 ‘live’ projects at any one time. BMG is therefore fully dependent on high standards of project management to ensure that the projects run smoothly and efficiently, and deliver a high-quality end ‘product’ for its many clients. To facilitate this, BMG operates the Prince2 (Projects in Controlled Environments) project management approach, adopting a number of key features including: • A focus on clear aims and objectives • A defined structure for project management • A task-based planning approach • Dividing the project into tasks, stages and milestones 2 Key BMG staff are Prince2 accredited. The stages adopted through the Prince2 approach ensures that we implement effective management of any research project, which includes: • Full project inception phase, involving a post-tender inception meeting with you, a familiarisation phase for the BMG team and an Inception Report for you. • Project planning, involving the identification of tasks, stages and milestones and the allocation of resources across the business (for example, researchers, sampling specialists, interviewers, data processing, analysts etc.). • Risk assessment (and associated actions). • Monitoring and controlling the different stages of the project through project meetings (internally as well as with the client), reviewing project plans and monitoring progress. • Managing successful delivery of research reports. • Ensuring final completion of projects, including end of project reviews (each wave) and final client ‘sign-off’. Throughout the project we will maintain a programme schedule. This will contain all actions required to complete the programme to its end, including long term developments. All decisions made along the way are captured within a ‘Decision Log’ within this. This acts a record of how and why all actions have been taken and can be used to induct new team members as well as preventing either you or us being unable to answer the question ‘why do we do that’. Continuous improvement We are committed to ensuring continuous improvement throughout our programmes. Much of this is driven through our

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internal and external governance processes outlined above. Within this programme we already believe there are three key areas to focus on: o Sample review – ensuring the sample is working as expected and generating the responses required. o Questionnaire review – identifying how well the questionnaire is working and whether any questions need refining or additional content is required. o Reporting impact – working with stakeholders to evolve the deliverables to ensure they meet their needs and that the programme develops a string internal reputation. Where areas of focus are identified, a dedicated team will be tasked with tackling these – without impacting on continual delivery. This team will be built of the relevant experts, depending on the nature of the issue. Meeting Project Timescales Underpinned by the processes outlined above, we have taken the following steps to ensure we can meet timescales for implementation and delivery: Sufficient resourcing: we ensure we allocate sufficient resource throughout the project lifecycle, using our central resource tool to book resource and monitor availability. Clear roles and responsibilities: BMG assigns a project lead for each project commissioned. The Project Lead is the main point of contact and will oversee all aspects of the research. Close working with clients: We schedule meetings and discussion with our clients throughout projects, and on different aspects of the research (for example questionnaire design) to expediate the process of agreeing deliverables and ensuring shared clarity on objectives. Frequent communication will be key to successful delivery and fast turnaround. 3 Change management We recognise that your needs may change during individual projects for example early findings may prompt changes to the ongoing questionnaires. We have an established process for change management to ensure we can respond flexibly and promptly while effectively managing any risks of implementing changes. Timetable and Key Milestones The below table shows our timetables for one wave and key milestones. We would create full timetables for the whole programme upon inception. Week Activity Responsibility Deliverables (where applicable) Week 1 Inception meeting CCS/BMG Project plan Week 2 Questionnaire workshop; finalisation of questions, materials and scripting; sample transfer BMG/CCS Finalised draft questionnaire Week 3 Testing of online questionnaire and sign off BMG/CCS Week 3 Soft launch – invitation 1 sent BMG Online instant analytics reportal access +1 day Soft launch data checked and full launch of invitation1 conducted BMG +2 day Review of bounce- back and undeliverable data BMG +4 days Reminder email 1 sent BMG + 3 days Delivery of interim raw data file and discussion on data tables BMG/ CCS Raw data (excel and/or .sav) + 4 days Reminder email 2 sent BMG Week 6 Completion of fieldwork BMG Data tables (excel) Raw data Week 8 Delivery of wave deliverables BMG Report and presentation Quality Assurance All of BMG's activities are governed by our Quality Management System (QMS), which is an integral part of the way in which we run our business and forms the cornerstone of all aspects of our service delivery. The QMS is a system that is designed to ensure that we continually develop the quality of our work and ensures compliance with our industry standards. Those standards are: • ISO 9001:2015; The International Standard for Organisational Quality • ISO 20252: 2012; The International Standard for Market Research • ISO 27001:2013; The International Standard for Information Security Management • Cyber Essentials, Plus certification • A Fair Data organisation • IQCS; The Interviewer Quality Control Scheme • The Data Protection Act • The Market Research Society Code of Conduct. In essence, it is a series of working directions (procedures) for everyone to follow and is a flexible system that gives everyone a clear understanding of the agreed processes to ensure we focus on delivering our promises. 4 We will agree a quality plan for the project with you during inception, setting out the quality checks and sign-offs which will apply to the project. We have established processes for quality assurance including: • Thorough checks of questionnaire scripts before launch • Monitoring of online data quality. BMG has a suite of sophisticated software to ensure that ‘speeders’, ‘straight-liners’ and duplicate respondents are flagged during survey completion • Data cleaning and checking protocols post-fieldwork • Deliverables including questionnaires and outputs reviewed and signed off by a Research Director before they are sent to you for comment and final sign-off. GDPR, Data Handling and Security We take the handling of all personal data highly seriously and have robust, audited

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processes in place to manage this. Consent and anonymity is clearly highlighted to all survey participants in invites and through explicit wordings and privacy policies shown as part of the survey so there is no risk of uninformed participation. As a registered Data Handler (Registration No. Z5081943), BMG has a dedicated team of database analysts, headed up by an ISEB (Information Systems Examination Board) qualified Business Systems Director, and has all of the necessary safeguards in place to ensure Data Protection procedures are adhered to. All aspects of data transfer will be made in accordance with the Data Protection Act (including GDPR) and MRS Code of Conduct and no data transferred from BMG Research will be attributable to an individual, unless specific permission was granted by the respondent. Rule B8 of the MRS Code of Conduct states that the anonymity of participants must be preserved unless they have given their informed consent for their details to be passed on. All personal / protected data is encrypted to FIPS 140-2 level 1 before electronic transfer. Our preferred route of delivery is via secure FTP transfer with password protected access, with passwords sent separately to any transfer. An automatic alert is sent to the system/network administrator once any data has been uploaded by a client, at which point it is removed to a secure server to which only authorised personnel have access. All data is automatically scanned for viruses and malware by Panda EndPoint protection. The data is then deleted from the FTP server. Under no circumstances is personal/protect data held in unencrypted form, on any wireless network or on removable media.

5.2 Meeting SLAs and Milestones Introduction We are entirely confident, based on our experience of delivering this programme so far, that we will be able to deliver the programme in accordance with your needs and requirements. We are aware that any programme has an inherent level of risk and this risk must be addressed and tackled to present issues arising. Below we list out the major risks we have identified for this programme, based on our experience of delivering this and similar projects – and our mitigations to prevent these being an issue: Risk Mitigation Setup Risk Assessment Counter measures / Contingencies Insufficient conceptual understanding of the study’s context and purpose Likelihood: Low Impact: High Thorough inception process Key team members (including Vicky Clarke and Sara Suarez) bring experience of delivering previous waves and thorough understanding of your requirements Collaborative design process and frequent communication with your team Data collection delay due to failure to agree questionnaire and sample Likelihood: Low Impact: Medium Early inception meeting for each phase of the research Ensure agreement of dates for key design elements Swift turnaround by BMG on receipt of feedback to drafts and final sign off Insufficient/ Poor quality sample affects data quality Likelihood: Medium Impact: Medium Use of CCS contacts as part of the sample Review external contact directory suppliers to ensure supplier can provide sufficient sample with relevant individuals Assess additional sample sources if additional contacts needed for one part of the sample Reputational damage through mismanagement of databases Likelihood: Low Impact: High BMG is accredited to ISO 27001, the international Information Security Management Standard Senior team allocated to project with significant experience Comprehensive quality control procedures at all stages Fieldwork risks Assessment Counter measures / Contingencies Data collection delayed through poor response rate Likelihood: Medium Impact: Medium Stress importance of project in introduction to survey Relatively long fieldwork period Manage fieldwork activity effectively, by monitoring quota achievement daily Survey planned with conservative response rate Data collection delayed by quota issues Likelihood: Low Impact: Medium Monitor all quota achievement on daily basis and allow backup resource to be pulled in early on if required Build contingency time into schedule Customer has difficulties in completing the online survey Likelihood: Low Impact: Medium Dedicated customer helpline and email address to help with any queries or issues Simple, intuitive navigation of online survey 2 Output Risks Assessment Counter measures / Contingencies Error or bias in data processing Likelihood: Low Impact: High BMG accountable for all data processes Dedicated DP executive working on the programme BMG has a dedicated validation unit for this purpose Report production

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delayed through drafting process Likelihood: Low Impact: High Report structure and style agreed in advance, including structure for score card reports Experienced personnel allocated to report writing Customer output needs change Likelihood: Medium Impact: Low Can be easily incorporated at short notice if required Programme is designed to be flexible and change to developing CCS needs Resource Risks Assessment Counter measures / Contingencies Key personnel on the project team are ill or leave Likelihood: Low Impact: Medium Keep/maintain records at all stages of the project, including project manual Transfer of knowledge and new team members brought onto the project Technical problems with Server Likelihood: Low Impact: Medium Robust systems and procedures with frequent testing, in line with Cyber Essentials Certification Data corruption through viruses etc. Likelihood: Low Impact: High Full back up in data handling and storage; daily virus checks Procedures in line with Cyber Essentials Certification Covid-19 restrictions introduced Likelihood: Low Impact: Low Procedures enabling offsite working with no degradation to data security Staff can log on to system remotely and have been working remotely for the majority of the time since March 2020 We would review these risks with you at the programme’s inception meeting and capture them within a ‘Risk Register’. This remains a live document we would continually update to ensure all risks are being fully mitigated throughout the programme. Problem resolution and escalation process In the unlikely event of poor performance under the contract, complaints being raised regarding the quality of the service, or queries about fieldwork outcomes, BMG will ensure that the appropriate levels of communication are in place to allow for the appropriate escalation of issues internally. In the case of queries about fieldwork progress, the whole project team will have access to the real time online dataset, allowing immediate assessments to be made. If there are issues relating to poor performance under the contract, these issues would be discussed at our regular meetings/telephone calls, with BMG providing details as to the corrective action(s) that we propose to put in place to address such issues. If a complaint is raised about the quality of the service, this would be escalated immediately to Simon Wood the Account Lead, and we would expect to engage in discussion regarding corrective action with the appropriate CCS representative. Project meetings will provide an opportunity to review all operational aspects of the contract, including any issues identified by end users of the data. These meetings will also ensure that yearly contractual obligations, such as the testing of contingency and business continuity plans, the review of IT security measures, are being upheld.

6.1 Evidence of Similar Projects 1) Advertising Standards Authority - Research on the effectiveness of the ASA advertising campaign (2019-2020): The challenge The Advertising Standards Authority (ASA) play a vital role in ensuring advertisements, including online advertising and brand websites, are decent, honest and truthful. In 2019, BMG was commissioned by the ASA to conduct a TV advertising campaign tracking evaluation. The campaign was designed to increase awareness of the ASA and their work around regulating advertising and built trust in the industry at a time when trust in advertising and advertisers was declining. The ultimate aim of the research was to evaluate the success of the campaign to allow the ASA to make medium to long terms decisions around future campaign strategy, targeting and resource allocation. More broadly, the project needed to provide the ASA with direct access to the voice of the public as a whole, reaching out beyond simply those who the ASA hear from day-to-day (i.e. via complaints) by conducing data-driven research and representative intelligence gathering. Our solution The campaign featured fresh takes on famous straplines from big brand names such as Churchill, IRN-BRU and Mastercard. It appeared in donated space across Scottish media, allowing the BMG team to measure its impact on awareness and trust among people in Scotland versus the rest of the UK. Taking a cross-sectional approach, the pre and post waves were drawn using a panel blending approach. A combined approach of a UK-wide tracker (c.1,500 respondents) and a Scotlandspecific wave (c.1,000 respondents) allowed us to make robust comparisons between Scotland and the rest of the UK. By blending completions across several online panels, we were able to guarantee a higher quality online sample that avoided the risks of relying on

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lowgrade and homogeneous recruitment methods. Working with the ASA, the BMG team built a series of core metrics capturing awareness, knowledge, word ‘trigger’ sentiment, creative recall, and trust – many of which were combined in a more holistic ‘impact funnel’. Most metrics were measured at two stages, once before and once following the campaign intervention, with fieldwork for each wave completed within five days. Insights & impact Our research highlighted various areas where the campaign had impact. The findings showed that around a third of Scottish adults recalled seeing or hearing the campaign, with an increase in Scottish adults certain that an organisation exists to complain to about advertising. The research also demonstrated trust in the ASA to be a driver of trust in the ad industry as a whole, with those who had seen the campaign around two-thirds more likely to trust the ad industry than those who had not. More generally, the research provided the ASA with the confidence and reassurance they needed to feel able to recommend the campaign be rolled out more widely across the UK. It 2 also highlighted key groups where cut-through was lower, allowing the ASA team to think about how they might fine-tune their approach to campaign execution and targeting. The programme also offered valuable insights for the advertising industry as a whole, allowing the ASA to continue to provide valuable thought leadership and discuss findings industry events such as the Advertising Association’s Trust Summit. What our client said about working with BMG “We’ve had a really positive experience working with BMG on our online campaign tracking survey. They’ve shown professionalism and flexibility throughout – both in terms of accommodating our business needs and in working around the limitations arising from Covid-19. They fully understood our objectives and provided brilliant guidance throughout to ensure a well structured piece of work that met our requirements. They were particularly efficient in their delivery of data and insights that have helped establish a strong benchmark for future studies.” 2) Crown Commercial Service Marketing Campaign Awareness Tracking (2019-2020) The challenge The Crown Commercial Service (CCS) needed to understand the effectiveness of its marketing activity in driving awareness, positive perceptions and usage of its public procurement products and services. The research was needed to inform future communications activity and to demonstrate the value of the organisation investing in marketing campaigns. CCS products cover a wide range of services and potential buyers are across all areas of the public sector. Our solution BMG conducted two iterations of the CCS Marketing Campaign Tracking Survey, first in June 2019 and again in September/October 2020. Individual links to an online survey were sent out via email to named contacts at public bodies. Over 900 people in buying roles within public sector bodies completed the survey in each wave. As a result, we achieved analysable base sizes by sub-groups. When it came to sampling, we used our established connection with BIP to purchase a database of people in buying roles within public sector bodies to complement CCS’ sample, which allowed us to reach non-customers as well as customers, and understand how the profiles and survey metrics differ among these two groups. At the data preparation stage, we weighted the data to ensure the results provided to CCS were representative by sector, so that analysis by sector could be carried out to help target communication activities. Insights & impact At the analysis stage we used a marketing funnel approach focusing on awareness, use, satisfaction and advocacy to uncover the areas that CCS could improve, as well as understanding CCS’ scores against those of competitors and whether these scores were changing over time so as to understand the impact of CCS’ communication activities. We then analysed significant differences in each of the funnel metrics by sector, organisation size, department worked at and product/service to gain an understanding on the profile of companies where CCS could improve its performance. 3 Our analysis also provided a profile of potential customers by showing the characteristics of those who are likely to consider using CCS in the future but have done so yet. Furthermore, we showed how CCS is viewed by customers and non-customers in relation to a wide variety of attributes such as ease of use, being experts, offering relevant solutions, saving organisations’ time, etc. We also showed CCS’ competitive position by portraying CCS’ perceptions as well as those of competitors. Regression analysis was then carried out to show which of these attributes are important for CCS to focus on to increase satisfaction and advocacy

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among customers and potential customers. Another important focus of the analysis was an assessment of CCS marketing campaigns in terms of recognition, relevance, credibility and originality. This provided an indication of the aspects that needed to improve to increase the effectiveness of communications and showed the effect of changes to the marketing campaign by tracking any changes in these metrics over time. We also showed the extent to which individual adverts were cutting through their target audiences. Additionally, our analysis showed what publications and websites customers and noncustomers use so that CCS can use the channels that have the biggest reach depending on the target group. Finally, we also provided summaries of key findings by sector in terms of funnel metrics, perceptions and channel use so that CCS could target their communications accordingly. In terms of lessons learnt, for future waves we agreed that it would be worth using another database that is not BIP, since response rates for additional clients were low (0.5% in wave 2). We therefore recommend exploring alternative options such as Oscar research. As per the recommendation on the last iteration of this study, we would also like to discuss with you the option of conducting exploratory research to uncover the most appropriate channels to reach non-customers since they were found to be less likely to use all channels listed and their use of social media declined from wave 1 to wave 2.

Simon Wood Head of Research, BMG Research Broad Expertise and Experience Education and Professional Status Skills and Expertise Sector Expertise: • Customer experience research design • Brand and communications research design • Stakeholder engagements including action planning and activation • Customer experience consultancy • Programme transition • Account leadership and development • All service industries including public sector, travel, leisure, automotive, financial services and telecommunications Bachelor’s Degree, History; University of York Member of Market Research Society Career Experience Simon leads the BMG research team. He provides consultancy and guidance on all aspects of quantitative research in all spheres with a particular focus in driving commercial and organisational action and developing customer strategy. Simon leads BMG’s relationship with major government clients including Home Office, Cabinet Office, DIT and DHSC. Prior to joining BMG, Simon was Divisional Head of Insight at Kantar. Before that he led Kantar’s UK Customer Experience practice for over 5 years. Simon is a thought leader in Customer Experience and broader research. He is a regular speaker at conferences and events and is the author of numerous articles, papers and blogs. Relevant Experience – Examples Public Transport Organisation – Customer experience, marketing evaluation and reputational management Brought together survey data, social media content and operational data to provide a 360 degree perspective on the organisation. Worked with key stakeholders to develop areas of focus for customer experience and strategic and tactical marketing development to drive behaviour change and revenue generation. Global Fuel Retailer – Brand strategy development and measurement Developed a unified brand measurement solution for brand health in over 60 countries to support the client’s expansion and new growth strategy. Integrated multiple sources of information to develop new insights at a granular level to provide strategic direction at a market level and key performance measurement for overall. Global Financial Services provider – Customer relationship research Established strategic customer relationship experience measurement for client and main competitors in multiple markets across 4 continents. Created relationship ranking for both KPIs and key driver attributes. Created score-card reports integrating competitive relationship KPIs by market. Vicky Clarke Research Director, BMG Research Experience Education and Professional Status Skills and Expertise • Specialist skills in strategic and evaluative research. • Significant experience in stakeholder tracking studies, mystery shopping and citizens’ panel management. • Expertise across a range of research methodologies, with particular strengths in B2B Performance/Sufficiency Assessments and large scale multiplemethodology projects. • High level of expertise in project management, client liaison and reporting. BA Hons. Business Studies - University of Durham Market Research Society Member

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Sector experience • Education and Training • Children and Young People • Leisure, Culture and Tourism • Local and central government Career Experience Vicky has over 10 years’ experience in the industry, specialising in complex quantitative and qualitative studies. Vicky leads many of our largest and most challenging quantitative studies for central government clients. She leads the Great Britain Tourism Survey, a monthly tracking survey for Visit Britain and recently led the Asymptomatic Testing Evaluation for DHSC. Vicky also leads our regular Perceptions Survey among local authorities for the Local Government Association. Vicky led the previous waves of the CCS marketing awareness research and is therefore very familiar with your requirements. Vicky started her research career at Ipsos MORI, where she joined as a graduate trainee in the Business Customer Satisfaction team. Here she worked on large scale international jobs, predominantly with c-suite business audiences. Research topics included customer and employee satisfaction, reputation, thought leadership and market understanding. In 2014 Vicky moved to the Market Opportunity and Innovation team at GfK. Here she specialised in market sizing, scoping and understanding studies amongst B2B audiences with blue chip clients, particularly in the technology sector. Prior to joining BMG Vicky worked for a research agency in central Birmingham, responsible for all work with professional services, industrial, public sector and consumer studies. Here, amongst other things, she furthered her qualitative experience, running studies and moderating focus groups with consumers and B2B audiences. Relevant Experience - Examples CCS Marketing Campaign Awareness Survey (2019-20): BMG were commissioned by CCS to conduct two waves of the marketing campaign tracking survey. Over 900 representatives of public sector organisations completed the survey at each wave. The survey examined awareness of CCS, use of its services, perceptions of the organisation, awareness and views of specific marketing campaigns and media usage. Food Standards Agency, Research with small businesses (2017): BMG Research were commissioned by the Food Standards Agency (FSA) to undertake a post implementation evaluation of the revised guidance on E-coli to ensure it had achieved its objectives, explore awareness and gather feedback from businesses and Local Authority Food Hygiene Enforcement Officers across England, Wales and Northern Ireland. As well as undertaking 500 CATI surveys with the person responsible for food safety in food businesses and 100 CATI surveys with Officers, the research also included an online focus group lasting 90 minutes with 8 Officers and 5 site visits with food businesses that lasted an hour and included a 15 minute observation of their food preparation and storage area. Key competencies for this framework • Questionnaire and sample design for quantitative surveys • Management of large scale CAWI surveys. • Data analysis and reporting on large scale quantitative surveys • Senior level client and stakeholder engagement • De-briefing/presentations • Complex project management Lucy Hallam Research Manager, BMG Research Broad Expertise and Experience Education and Professional Status Skills and Expertise Sector Expertise: • Qualitative programme evaluation • Campaign marketing communications evaluations, including cognitive and emotional takeaways • Qualitative cognitive testing for quantitative research design • Behaviour change research evaluation and design • Stakeholder engagement, from research design through to reporting needs for implementation of results • Integration of qualitative and quantitative research for reporting • Narrative, insightful, and actionable reporting of results • Third and public sector industries including: Government and politics, strategic communications, international development, charities and foundations. 1 st Class Bachelor’s Degree Geography and Modern Languages Newcastle University Career Experience Lucy joined BMG’s London office in 2020, where she manages a wide range of mixed methods research projects for a variety of clients. Her focus is on unearthing actionable insights to drive real growth, which she aims to do through robust client engagement and collaborative working. She does this through combining her research and methodology expertise with the client’s in-depth understanding of their business needs, and uses her natural curiosity and qualitative research experience to gain this initial knowledge, bringing it to the forefront of her research methodology design. Prior to joining BMG, Lucy worked as the qualitative lead for YouGov Special Projects in Erbil, Iraq, where she was responsible for integrating qualitative and quantitative research to feed into policy development

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and behavioural change campaigns. Here, she led a team of three media researchers, who conducted in-depth desk-based analyses and literature reviews to inform research design and methodology, as well as two junior qualitative researchers. Her experience here was mainly focussed on Government initiatives, but there was a strong focus on cultural integration and development, with strong links formed between cultural funding bodies and development. YouGov’s partner business here, a production company, would use insights generated from the primary research to create films and advertisements to address business objectives. Relevant Experience – Examples National NGO – Supporter insight framework design Developed a tracking framework to measure supporter sentiment using a range of strategic KPIs and key drivers, which fed into a brand health metric, to measure the overall impact of public campaigns and provide strategic recommendations for future communications and campaign activity. COVID-19 Rapid Survey of Adherence to Interventions & Responses Study (DHSC and Cabinet Office – 2020-21) Managed day to day delivery of this rapid turnaround large-scale polling study to inform the response to the Covid-19 pandemic. Data was collected online, with 2,000 interviews per wave among a UKrepresentative sample. Blending panel providers ensured that fieldwork could be delivered quickly (c. 1-2 days) and ensured results relied on robust and high-quality data. The evolving pandemic meant the project team had to rapidly re-focus reporting to accommodate emerging issues all whilst tracking core measures. Local Government – Impact of public sentiment on consumer confidence Designed and led the qualitative aspect of a local Government survey analysing the impact of decreasing oil prices on public sentiment towards the Government, trade and the economy, and consumer confidence. Brought together qualitative and quantitative research to recommend a national strategy for public communications on oil trading. National Government Department – Recruitment campaign evaluation research Designed evaluative quantitative research for a national recruitment campaign targeting different segments of the population, incorporating strategic campaign success measurement through KPIs, and recommending best steps forward to maximise campaign reach. Sara Suarez Senior Research Executive, BMG Research Broad Expertise and Experience Education and Professional Status Skills and Expertise • CAWI and CATI methodologies • Qualitative methodologies • Campaign evaluations • Project management of large scale quantitative studies. • Experience of a range of policies, incl. education and skills, health, food hygiene, housing etc. MA in the European Union and International Relations, Aston University (2017) BSc Hons French and English Language, Aston University (2015) Career Experience Since joining BMG in 2018, Sara has been involved in the successful delivery of a range of projects for public sector clients. This has included managing the previous waves of the CCS Marketing Campaign Awareness survey. In addition to this, Sara has managed from inception to reporting two waves of research into public perceptions of the police and fire services in England on behalf of Her Majesty’s Inspectorate of Constabulary and Fire and Rescue Services. She has also managed from inception to reporting a knife crime campaign evaluation on behalf of the Home Office. Four waves of this study were completed by BMG. Relevant Experience - Examples CCS Marketing Campaign Awareness Survey (2019- 20): BMG were commissioned by CCS to conduct two waves of the marketing campaign tracking survey. Over 900 representatives of public sector organisations completed the survey at each wave. The survey examined awareness of CCS, use of its services, perceptions of the organisation, awareness and views of specific marketing campaigns and media usage. Non-household customer insight survey (Market Outcomes and Enforcement), Ofwat/CCWater: BMG recently completed a study among non-household customers about awareness and switching activities in the water retail market. The study gauges the experiences and views of customers, including the extent to which customers have chosen to engage with the market, their needs and expectations have been met, and the reasons for these outcomes. It comprises a representative survey of 1000 businesses and a quota for an additional 1000 that have switched retailer or negotiated a better price. Key competencies for this framework • Client and stakeholder engagement • Management of large scale CAWI surveys • Project management • Data analysis and reporting, providing actionable findings Clive McDonnell

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Data Scientist, BMG Research, Since 2014 Broad Expertise and Experience Education and Professional Status Skills and Expertise • Extract and manipulate data from data warehouses using SQL Server 2008 • Produce and maintain Confirmit scripts for CATI, CAPI and CAWI projects • Data mining through SPSS and R. BSc (Hons.) Mathematical sciences Sector experience • Public sector surveys on a range of issues including ad-hoc survey design. • Quantitative research methods (surveys administered through telephone, in home, street, postal and online), including sample and questionnaire design, and final data interpretation and reporting. • Data mining through SPSS and R. Career Experience Clive has been working at BMG since September 2014. Clive previously worked as a Predictive Modeller, where he provided analytical support for insurance companies: analysing large data sets to provide insight using various statistical techniques. Clive now concentrates on statistical analysis, data modelling and data processing on a wide range of projects, mainly in the fields, factor analysis, segmentation, latent class analysis, regression models. Relevant Experience - Examples West Midlands Police: predicting drivers of confidence through various methods (polychoric correlation, sufficient dimension reduction regression, random forests), and contrasting the results from each output. DECC: initially clustering the sample to identify key potential customer groups according to present energy usage and demographic considerations. Subsequently, both ordinal regression and classification analysis were undertaken to identify the key observable elements (i.e. non-attitudinal variables) that might account for differing levels of interest in the client’s product. Newham Residents Survey: logistic regression examining factors that classify whether respondents were satisfied or not satisfied with overall council performance. Explanatory variables included attitudes towards individual services, and to the area in general. Over 80 explanatory variables were initially used, reduced to around 20 key variables through hierarchical dropping of non-significant terms. Key competencies • Hypotheses testing (χ2, F-test, z-test) • Regression models (ANOVA, ANCOVA, MANOVA, linear, binomial, ordinal); • Correlation/’key-driver’ models, using r, rho, tau, tetrachoric or polychoric models; • Observation clustering, including hierarchical clustering, kmeans & 2-Step, and Latent Class Analysis

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**Part 2: Contract Terms – Provided as a separate document**

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