

CONTRACT ORDER FORM

This Contract Order Form is issued in accordance with the provisions of the Apprenticeship Training Provider Dynamic Marketplace (DMP) Agreement for the provision of **Finance Apprenticeship Training Services**. Dated 16 October 2024.

The Supplier agrees to supply the Goods and/or Services specified below on and subject to the terms of this Contract.

For the avoidance of doubt this Contract consists of the terms set out in this Contract Order Form and the Contract Terms

Order Number	SR1947913659
From	HMRC ("Customer")
To	First Intuition Limited ("Supplier")

1. CONTRACT PERIOD

1.1	Commencement Date	16 October 2024
1.2	Expiry Date (Apprenticeship programme completion date / End Point Assessment completion date)	<p>The maximum Contract Period will be 11 years.</p> <p>The Contract will initially cover a period of 8 years with an option to extend the contract on a 1 year term for 3 years (8+1+1+1). During the initial contract period, there would be intakes of new apprentices on a maximum of 3 years apprenticeship programmes plus their End Point Assessment. This is to ensure that there is contractual cover for any break in learning during the initial contract period.</p> <p>In addition to any Termination clauses within the Contract Terms, the Customer reserves the right to review the Contract Period on the third anniversary of the Commencement Date and on an annual basis thereafter with the intention of either continuing the Contract Period with the successful Supplier or to issue a Notice of the intention to discontinue the intake of any further apprentices.</p>

2. SERVICES REQUIRED

2.1	Services Required.	<ul style="list-style-type: none">The Supplier must provide support for induction of the Apprentices; including delivering sessions bespoke for all apprentices at each intake.The Supplier must be able to provide bespoke, contextualise and/or package the
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		<p>Apprenticeship learning to suit the specific needs of the Apprentice and meet with the Customer requirements. In all cases the integrity of the learning outcome to the relevant Apprenticeship Standard shall be maintained.</p> <ul style="list-style-type: none"> • The Supplier must provide a named account manager for the provision of all 3 levels of finance apprenticeship. • The Supplier must provide an assessment tool to measure starting point (facilitates discussion and scores knowledge and experience before the programme of learning begins and records progress). This process will include a full evaluation of the individual and their current role. • The supplier must provide online face-to-face coaching from a 'skills coach' on a 1:1 basis outside of classroom learning. • The supplier must provide the inclusion of group delivery (online). • The supplier must provide resources and materials at no extra cost. • The supplier must provide an EPA supplier. • The supplier must provide EPA preparation support and resources. • The supplier must provide engagement and reflective learning account to record off-the-job training, support, and progress. • The supplier must provide Additional Learning Needs (ALN) provisions. • The supplier must provide regular Student / Coach / Line Manager progress review meetings (encompassing both technical and soft skills) at a frequency to be agreed. • The supplier must provide engagement - reflective learning account to record off-the job training that is monitored. • The supplier must provide information to HMRC to assist with the apprenticeship recruitment process. This includes, but not limited to, qualification eligibility criteria, provider eligibility checks, full apprenticeship programme schedule. • The supplier must provide full administrative support to apprentices with regard to the apprenticeship sign up process, processing the associated applications, ID and qualification checks. • The supplier should have networking opportunities through a forum. • The supplier should have flexibility and ownership – apprentices able to book meetings with their coach themselves.
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	<p>APPRENTICESHIP TRAINING PROVIDER SERVICES / END POINT ASSESSOR SERVICES / BOTH.</p> <p>LOCATION</p> <p>APPRENTICESHIP TYPE AND SPECIFIC APPLICABLE INSTITUTE FOR APPRENTICESHIPS STANDARD</p> <p>NUMBER OF STUDENTS</p> <p>CLASS BASED</p> <p>ADDITIONAL SERVICES</p>	<ul style="list-style-type: none"> The supplier should have structured self-study guidance, which should be accessible to the apprentices at any time during the lifetime of the contract. The supplier should have mid-point assessments. <p>Training provider services and End Point Assessor services required.</p> <p>National</p> <p>Level 3 Assistant accountant ST0002 Level 4 Professional accounting or taxation technician ST0003 Level 7 Accountancy or taxation professional ST0001</p> <p>Approximately 100 students per year.</p> <p>Online / Classroom</p> <p>To be determined in line with the Pricing Matrix</p>
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3. CONTRACT PERFORMANCE

3.1	Required Apprenticeship Standard [ie the required apprenticeship course]	<p>Level 3 ST0002 AAT (Association of Accounting Technicians)</p> <p>Level 4 ST0003 AAT (Association of Accounting Technicians)</p> <p>Level 4 ST0003 CIMA (Chartered Institute of Management Accountants)</p> <p>Level 7 ST0001 ACCA (Association of Chartered Certified Accountants)</p> <p>Level 7 ST0001 CIMA (Chartered Institute of Management Accountants)</p> <p>Level 7 ST0001 ICAEW (Institute of Chartered Accountants in England and Wales)</p>
3.2	Quality Standards	<p>Continued adherence to the relevant Institute for Apprenticeships industry standard. (www.instituteforapprenticeships.org/)</p> <p>Maintained ESFA registration and accreditation.</p> <p>General industry good practice.</p>

4. PAYMENT

4.1	Contract Charges	<p>Contract Charges = approximately £9,436,500</p> <p>Contract Charges comprises:</p> <p>Total cost of approximately 600 apprentices across each Apprenticeship Standard</p> <p>Levy services funded by ESFA - fully funded;</p> <p>Top up for fees in excess of ESFA band - N/A;</p> <p>Additional extra services - N/A</p> <p>Includes the cost of any subcontractors and the cost of an approved end point assessor.</p>
4.2	Payment terms/Profile	<p>Payment to be made in accordance with the current in force ESFA funding rules.</p> <p>Further additional terms in Annex 2 of Contract Schedule 3</p>
4.3	Customer billing address	<p>HM Revenue & Customs 100 Parliament Street Westminster London SW1A 2BQ</p>

5. LIABILITY AND INSURANCE

5.1	Suppliers limitation of Liability	In Clause 25 of the Contract Terms
5.2	Insurance	<p>(Clause 26 of the Contract Terms):</p> <p>Professional Indemnity Insurance cover of £1 million any one claim.</p> <p>Public Liability Insurance cover of £1 million any one claim.</p> <p>Employers Liability insurance cover of £5 million any one claim.</p>

FORMATION OF CONTRACT

By signing and completing this Contract Order Form the Supplier and the Customer agree to enter into a binding contract governed by the terms of this Contract Order Form and the attached terms and conditions.

For and on behalf of the Supplier:

Name and Title	REDACTED
Signature	REDACTED
Date	REDACTED

For and on behalf of the Customer:

Name and Title	REDACTED
Signature	REDACTED
Date	REDACTED