

**SCHEDULE 2****Letter of Appointment and Order Form**

10 Victoria Street  
London  
SW1H 0NN

Dear [REDACTED],

**Letter of Appointment**

This letter of Appointment is issued in accordance with the provisions of the Framework Agreement between The Department for Science, Innovation and Technology and the Supplier dated 27 February 2024.

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

Order Number:	418000001626 (initial purchase order number)
From:	Government Office for Science ("Customer")
To:	Waverley Management Consultants Ltd ("Supplier")

Effective Date:	27 February 2024
Contract Term:	2 years expiring 27 <sup>th</sup> February 2026 with a break clause at 12 months (27 <sup>th</sup> February 2025) and the option to extend by 1 year to 27 <sup>th</sup> February 2027.

Services required:	Set out in Section 2 (Services offered) and refined by: The Customer's Project Specification attached at Framework Annex A and the Supplier's Proposal attached at Annex B
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Key Individuals:	[REDACTED], Waverley
[Guarantor(s)]	NA

Call Off Contract Charges (including any applicable)	Total contract value is £65,175.00 (ex VAT) [REDACTED]:
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discount(s), but excluding VAT):	<ul style="list-style-type: none"> <li>• <b>Initial design and piloting</b> [REDACTED], approximate invoicing dates as follows: <ul style="list-style-type: none"> <li>○ End of Feb 2024: [REDACTED] design of toolkit – deliverables 1–2)</li> <li>○ End of March 2024: [REDACTED] (pilot delivery – deliverables 3–4)</li> <li>○ End of May 2024: [REDACTED] (post-pilot delivery of supplementaries – deliverables 5–7)</li> </ul> </li> <li>• <b>Ongoing delivery</b> [REDACTED], invoiced in quarterly instalments: from around end of June 2024 to end March 2026 (subject to break clause) (deliverables 8–10)</li> <li>• The option to <b>extend ongoing delivery by 1 year to end March 2027, invoiced in quarterly instalments, is subject to additional DSIT financial approval</b> [REDACTED] [REDACTED]</li> </ul>
Insurance Requirements	NA
Customer billing address for invoicing:	Government Office for Science 10 Victoria Street London SW1H 0NN

Additional Clauses:	See break clause details above
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## FORMATION OF CALL OFF 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 Terms.**

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

**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:**

Name and Title: [REDACTED]

Signature: [REDACTED]

Date: 5/03/2024

**For and on behalf of the Customer:**

[REDACTED]  
Deputy Director for GO-Science

[REDACTED]

Date: 28/02/24

## Annex D: Order Form

### Framework Agreement – Futures Framework

This should include;

Annex A – Customer Project Specification

Annex B – Supplier Proposal

Part 2 – The Terms as set out in this Framework Schedule 2 (Letter of Appointment and Order Form) shall apply to this Contract.

#### FROM

<b>Customer</b>	Government Office for Science
<b>Service Address</b>	Government Office for Science 10 Victoria Street London SW1H ONN
<b>Invoice Address</b>	(also see Contact Ref in section below)  Government Office for Science 10 Victoria Street London SW1H ONN
<b>Contact Ref:</b>	
<b>Order Number</b>	To be quoted on all correspondence relating to this Order: 418000001626
<b>Order Date</b>	27 February 2024

#### TO

<b>Supplier:</b>	Waverley Management Consultants Ltd
<b>For the attention of:</b>	[REDACTED] [REDACTED] [REDACTED]
<b>Address</b>	55 Deerpark Sauchie Alloa FK10 3ll

#### 1. SERVICES REQUIREMENTS

##### (1.1) Services [and Deliverables] Required:

See Annex A and Annex B

##### (1.2) Commencement Date: 27 February 2024

**(1.3) Price Payable by Customer:**

- **Initial design and piloting** [REDACTED], approximate invoicing dates as follows:
  - End of Feb 2024: [REDACTED] (design of toolkit – deliverables 1–2)
  - End of March 2024: [REDACTED] (pilot delivery – deliverables 3–4)
  - End of May 2024: [REDACTED] (post-pilot delivery of supplementaries – deliverables 5–7)
- **Ongoing delivery** [REDACTED], invoiced in quarterly instalments: from around end of June 2024 (deliverables 8–10)

Thereafter, option to **extend ongoing delivery by 1 year** [REDACTED], invoiced in quarterly instalments.

**(1.4) Completion Date:**

The term of the contract is 2 years expiring 27<sup>th</sup> February 2026 with a break clause at 12 months (27th February 2025) and the option to extend by 1 year to 27th February 2027 subject to DSIT financial approval.

**2 ADDITIONAL REQUIREMENTS**

**(2.1) Supplemental Requirements in addition to Call-Off Terms and Conditions:** NA

**(2.2) Variations to Call-Off Terms and Conditions:** NA

**3. PERFORMANCE OF THE SERVICES [AND DELIVERABLES]**

**(3.1) Key Personnel of the Supplier to be involved in the Services [and deliverables]:** Alister Wilson

**(3.2) Performance Standards:** see Annex A and B

**(3.3) Location(s) at which the Services are to be provided:** see Annex A and B

**(3.4) Quality Standards:** see Annex A and B

**(3.5) Contract Monitoring Arrangements:** see Annex A and B

**4. CONFIDENTIAL INFORMATION**

**(4.1) The following information shall be deemed Commercially Sensitive Information or Confidential Information:** Any discussions or correspondence between the Customer (including content from civil servant learners during training sessions) and the Supplier

**(4.2) Duration that the information shall be deemed Commercially Sensitive Information or Confidential Information:** indefinitely – unless agreed in writing between all parties

**BY SIGNING AND RETURNING THIS ORDER FORM THE PROVIDER AGREES** to enter a legally binding contract with the Customer to provide the Service specified in this Order Form together with, where completed and applicable, the mini-competition order (additional requirements) set out in section 2 of this Order Form. Incorporating the rights and obligations in the Terms and Conditions set out in the Framework Agreement entered into by the Provider and The Department for Science, Innovation and Technology and any subsequent signed variations to the terms and conditions.

For and on behalf of the Supplier-

Name and Title	[REDACTED]
Signature	[REDACTED]
Date	5/03/2024

For and on behalf of the Customer-

Name and Title	[REDACTED]
Signature	[REDACTED]
Date	28/02/24

## ANNEX A

### Customer Project Specification

#### Futures Framework Project Specification:

#### Refresh of GO Science Futures Toolkit Training

##### Context

##### Background:

The Government Office for Science is responsible for driving cross-government capability in Futures and Foresight to improve UK strategic advantage and resilience to uncertainty. We do this by providing resources, capability building, advisory support and a community of practice.

One of our most popular resources is the [Futures Toolkit](#) (2017). It is well used, and feedback suggests learners both find the content helpful and can demonstrate positive impact on their work. To promote this resource round government, GO-Science has historically funded quarterly cross-Whitehall Toolkit training to c.30 attendees each time, delivered digitally, over 2 x 0.5 day sessions. The target audience is HEO-G6 level civil servants, using Futures at 'working-level' as a tool to support policy, strategy, analysis or service delivery. Training content should not assume students have prior knowledge.

The Futures Toolkit has been refreshed; a revised version is available in pdf and will shortly be published on gov.uk. This version has a similar structure to the original but has updated content, a more digital-friendly format, and additional case studies and workshop support.

We need to update our training offer to align with the new Toolkit. We chose to contract sequentially and separately for the training so that companies tendering could base their bids on a near-published draft. We will share the pdf with all confirmed interested bidders.

The contract will cover

1. Design, piloting, finalising and ongoing quarterly delivery of the core training
2. Piloting and, subject to confirmed demand and positive evaluation feedback, ongoing quarterly delivery of two supplementary deliverables:
  - a) A 'train the trainers' day, designed to enable others to teach their teams the Toolkit
  - b) 3 one-hour masterclasses per quarter focused on other tools in the Toolkit that are not covered in the core training (same 3 tools each quarter, one/hr)

The decision on whether to continue quarterly delivery of 2(a) and (b) will be taken and confirmed by GO-Science following delivery of the pilots.

The initial contract will be for two years, with a one year break clause, with the option to extend for a further year if both parties agree.

**The Brief:****Core training**

We would like to engage a supplier combining Futures and facilitation expertise to design and deliver the above quarterly toolkit training programme. Dates to be agreed with GO-Science, who will manage marketing and booking.

Demand for and feedback on the previous toolkit training offer remains steady and positive, so our spec does not depart significantly from the previous offer in terms of timing and content, though we welcome suggestions for variation. Our core requirements are that:

- Content is framed around the updated Toolkit structure;
- Trainers supplement that basic structure with case examples from their own experience of using Foresight and Futures in a government context, both proactively in course design and reactively in response to attendees' questions.

Learners should leave the training:

- Understanding key concepts of Futures and how to apply them in a UK government context;
- Familiar with the structure and broad content of the toolkit (we don't expect the training to cover all tools in detail);
- Having practiced application of several tools. Horizon scanning should be one of the tools included on the core day. Selection of which additional tools to include, and justification of your choice, will form part of the bidding process.
- Confident to plan and run their own Futures sessions;
- Knowing where to find further government resources and support.

**Evaluation**

Suppliers should include proposals for:

- Immediate post-delivery feedback on course content, delivery, and achievement of learning outcomes;
- Follow-up feedback on the wider impact of the learning on individuals e.g. focus groups one year on.

**Delivery location**

Our starting assumption is that the core training will be delivered virtually, as attendees work all over the UK. We are open to proposals incorporating an in-person element, for example this might be appropriate for train the trainer sessions. All sessions, virtual or in-person, should be interactive and incorporate both group discussion and individual exercises.

**Content ownership**

The training will be delivered by the bidder, but the content and design of the core day and supplementary deliverables will be owned by GO-Science. After this contract is complete GO-Science will retain the right to update and edit the content and retender to the existing or new suppliers.

**Supplementary deliverables**

As part of this contract, we want to pilot two supplementary quarterly deliverables:

- I) A 'train the trainers' one day session, for graduates of the main toolkit training course who wish to go on to train others. This will be useful for Departments who wish to train larger numbers of staff. We expect demand to be around 5-10 people per quarter.

This content should build from the core training, focusing on how to pass on the training you have learned to others. It should include:

- Recap of core content learned at the main training;
- Advice on how to structure and facilitate the session;
- Opportunities to role play/ practise some of the material;
- Opportunities to discuss and share experience of/ ideas for applying Futures to attendees' own context/ roles.

- II) Supplementary one hour masterclasses for smaller groups (c. 10-15 people).

Each one hour session should cover one additional tool from the GO-Science toolkit, excluding those already covered in depth in the core training, so you are offering a set of 3 x 1 hr sessions, covering one tool each, every quarter. This targets Futures enthusiasts who want to develop their skills further.

Your spec for this component should be clear about:

- Which three additional tools you would prioritise and why (we propose to offer the same three tools each quarter);
- Your proposed structure for the sessions.

Both would be delivered once over a slightly longer timeframe (see Supplier Deliverables) and evaluated before GO-Science decides whether to build them into an ongoing contract. You may use subcontractors if you wish (see below) but these should be specified in your bid and approved by GO-Science.

The training should be:

- Framed around learning outcomes, drawing from Futures-related [Policy Profession Standards](#) (p7, Pillar 1.1), further developed in the [Annex](#) (p6 and 8);
- Structured around the content of the updated GO-Science Futures Toolkit (pre-publication draft provided to interested bidders);
- Delivered online, using platforms compatible across government (we are open to suggestions for additional in-person options);
- Interactive and engaging, drawing on trainers' own experience using Futures in government and other organisational contexts and including opportunities to discuss application challenges (overcoming 'real world' barriers to using Futures etc.) as well as learning how the tools work;
- A mix of 'chalk and talk' tuition on the toolkit and individual tools, and exercises alone or in groups;
- Compliant with government accessibility requirements;
- Signposted to and from the wider GO-Science Futures offer (brochure provided).

The GO-Science contract will be with the Trainer. Joint bids from two or more suppliers are welcome. If our chosen supplier opts to subcontract any element of the training, they will need to manage that subcontract themselves and include information about them in their bid so that GO-Science can approve the arrangements as part of the wider contract.



The supplier will be expected to deliver the following, based on expected contract award of early February 2024.

- First draft course design: mid-February.
- Review stage: mid-end February
- Post-review course design: early March
- First (pilot) run: mid-end March
- Review and any adjustments to course plan: mid-April.
- Delivery Quarterly (After first pilot, standard suggested cycle: July/October/Jan/April)

**Delivery contract: 2 years with break clause at 12 months and option to extend by 1 year.**

Evaluation and extension of pilots to be negotiated by both parties, final decision on ongoing delivery of train the trainers and masterclasses rests with GO-Science.

<u>Deliverable</u>	<u>Date Delivered</u>	<u>Payment</u>
<b>Design and piloting – indicative budget £40-50k</b>		
Deliverable 1: First draft design of Core Day plan for review [review to be run by GO-Science].	End February 24	40%
Deliverable 2: Revised Core Day draft responding to review comments	Early March	
Deliverable 3: First Core Day pilot run with learners	Mid-end March	30%
Deliverable 4. First draft designs of both supplementary deliverables (train the trainers and masterclasses).	Mid-end March	15% (covers both pilots)
Deliverable 5: Core day revised design following pilot feedback	Mid- April 24	
Deliverable 6. Pilot ‘train the trainers day’	End May 24 (deliver both pilots)	15% (covers both pilots)
Deliverable 7: Pilot supplementary 1 hour seminars in up to 3 additional tools/ quarter (i.e., different tools each time).		
<b>Ongoing delivery: indicative budget £16-22k p.a.</b>		
Deliverable 8: Quarterly training sessions	June, Sept, Dec, March	60%

Deliverable 9: If pilots successful, ongoing delivery of 1 'train the trainers' day/ quarter	Sept, Dec, March	20%
Deliverable 10: If pilots successful ongoing delivery of 3 supplementary seminars/ quarter	Sept, Dec, March	20%
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Mandatory services for the supplier to provide		
<p>The supplier must:</p> <ul style="list-style-type: none"> <li>• have strong experience in explaining Futures tools and methods to staff working in a government/ public sector context, including drawing on past projects as case examples</li> <li>• have strong experience in training and facilitation including online delivery</li> <li>• have a strong track record of engaging learners and responding to their requirements</li> <li>• be able to dedicate sufficient and flexible resource to meet immediate deadlines, deliver ongoing quarterly sessions, and test pilot elements.</li> </ul> <p>Further desirable criteria that the supplier might demonstrate include:</p> <ul style="list-style-type: none"> <li>• Experience in producing toolkits or explanatory guides</li> <li>• Wider experience training government employees</li> </ul>		
<b>Evaluation Criteria</b>		
<p>i) <b>Price (20%)</b></p> <p>ii) <b>Quality (80%)</b></p> <p><b>Quality sub-criteria:</b></p> <p><b>Skills &amp; Expertise (30%)</b></p> <ol style="list-style-type: none"> <li>Does the supplier have proven training delivery expertise, including online, to bring to the project?</li> <li>Does the supplier demonstrate sufficient knowledge of the diverse range of Futures techniques required to train on the toolkit, and their application in a public sector context?</li> <li>Can the supplier provide evidence of previous work that indicates the quality or style of product we should expect, or the relevant expertise of the supplier?</li> </ol>		

**Ability to deliver (25%)**

- d. Has the supplier demonstrated a clear and resourced plan for delivery to coincide with the proposed timeline of the project? Please include details of your proposed team, timeframe, and how you propose to work together and with us.
- e. Has the supplier demonstrated that they have suitably experienced and qualified staff to deliver the project?
- f. Has the supplier demonstrated understanding of effective evaluation techniques and plans for assessing the impact of the course in achieving desired learning outcomes?

**Communication Skills (15%)**

- g. Does the supplier have a track record (or potential) of working with government and public sector audiences?
- h. Does the supplier have the ability to communicate to different levels of seniority and/or Futures expertise in a clear and concise manner?

**Flexibility and Innovation (10%)**

- i. Can the supplier demonstrate up-to-date knowledge and experience of innovative training techniques, including online approaches?

**Budget**

Design and delivery has been costed by DSIT and is expected to range between £50k-£70k for the maximum two year period. We propose to stagger payments as indicated in the above schedule.

Budget will encompass the cost of kick-off meetings, development and presentation of products and additional consultancy time for any ad hoc tasks that may arise. There may be the possibility of organising some meetings in person; if so, these will take place in London (but this is not an essential requirement).

**Clarification Period:**

Suppliers will have a clarification period of two weeks from receipt of this document to ask questions about the Project Specification and until **11:00 29 January 24** to submit a proposal. Their proposal in response should be limited to five pages in length. There is no specific structure required for the response, however it should cover the key elements identified in this document.

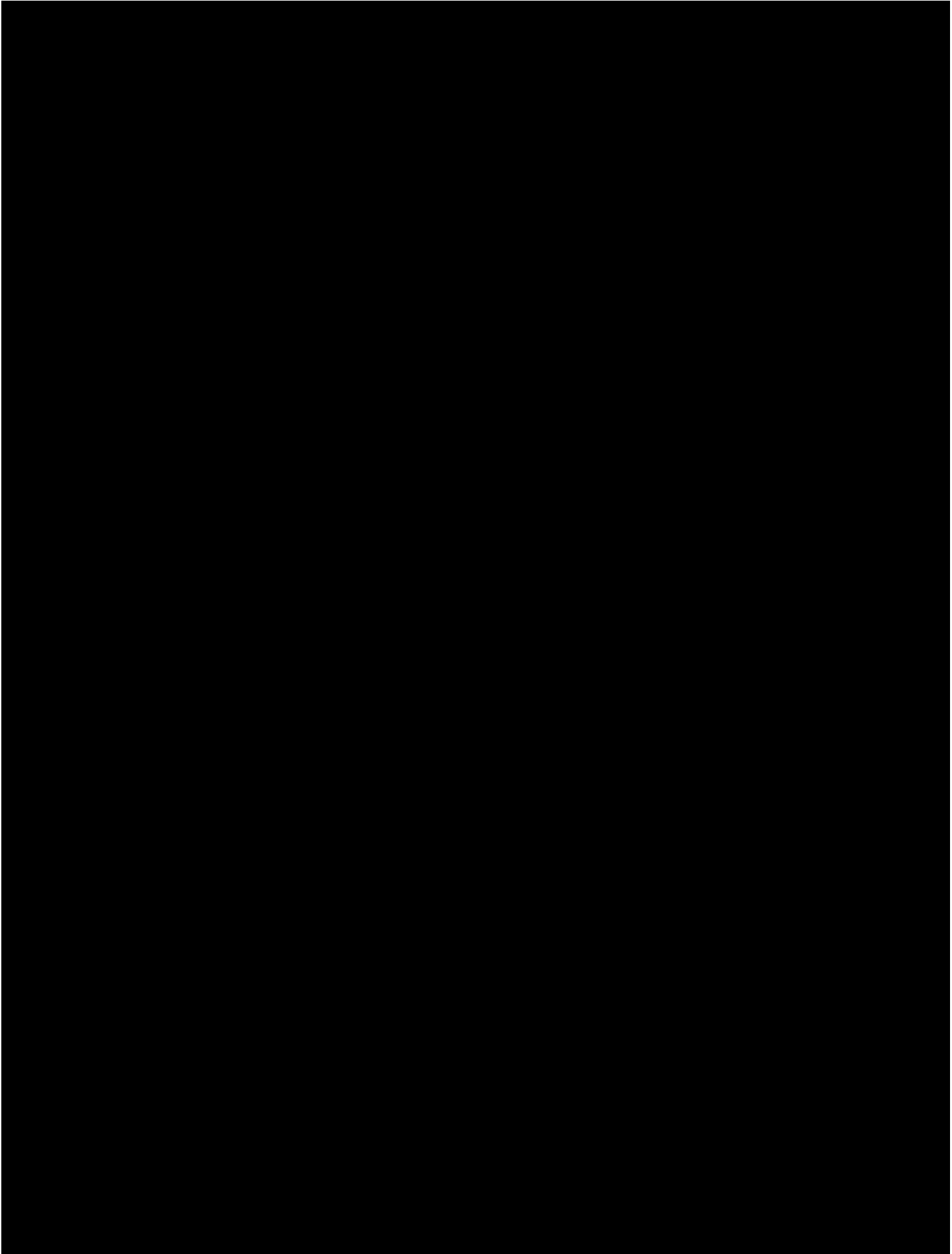
**Working Arrangements**

The provider will work with colleagues from GOS. We propose that they:

- attend half-hour check-ins on a weekly basis during the design/ pilot phase to share outputs.
- engage with learners/ reviewers during the development of the revised training, through workshops, surveys or other methods as appropriate.
- schedule evaluation calls after the initial pilot programmes to share immediate feedback. Once the programme is established, communications can be reduced

**ANNEX B**

**Supplier Proposal**



**Part 1: Terms**

*Signed supplier Framework Contract below:*

