

## Merlin Standard Advisory Board Minutes for 22 September 2015

### Attendees:

David Hall (DH)	DWP (deputising for John Michalski as chair)
Jane Malbasa (JMa)	DWP
Louise Beatty (LB)	Cabinet Office (deputising for Nick Starkey)
Steve Swan (SS)	Tomorrow's People
Sam Windett (SW)	ERSA (deputising from Kirsty McHugh)
Terry Davis (TD)	Bradford Council
Paul Warner (PWa)	AELP
Louise Capel-Cure (LCC)	Ingeus
Ruth Regan (RR)	Assessment Services Ltd
Monya Ladipo (ML)	DWP (Note)

### Apologies:

John Michalski (JMi)	DWP
Chris Higgs (CH)	DWP
Glenn Finlayson (GF)	DWP
Barry Clarke (BC)	DWP
Gill Holmes (GH)	DWP
Andrew Thomas (AT)	DWP
Mark Winter (MW)	ACEVO
Nikki Vokes (NV)	SNCBC
Huw Davies (HD)	BASE
Kirsty McHugh (KM)	ERSA
Nick Davies (ND)	NCVO
Paul Winyard (PWi)	Compact Voice
Nicholas Starkey (NS)	Cabinet Office
Paul Bridle (PB)	Assessment Services Ltd

## 1. Welcome and Introductions

- 1.1 DH welcomed attendees, and introduced himself as the DWP commercial lead for Merlin. This was followed by introductions, including SW, who mentioned that she was the new Head of Policy and Communications at ERSA.

## 2. Minutes of Previous Meeting

- 2.1 The minutes of the last meeting on 19 May 2015 had been accepted by email.

## 3. Action Points

- 3.1 **Action Point 1/May 15:** LB to discuss with Crown Commercial Services a generic Government Supply Chain Standard with development led by Cabinet Office/CCS; assuming that Departments using it will require additions to the basic Standard.

**On-going:** Deferred to next MAB as Cabinet Office is looking into possibilities for collaboration with other Departments.

- 3.2 **Action Point 2/May 15:** Board members to reflect on the findings of the Merlin Research and provide further comments and suggestions to CESI.

**Cleared:** CESI has submitted the final report to DWP.

#### **4. DWP Update – David Hall**

- 4.1 DH advised that the upcoming Spending Review and other pending issues such as the Localisation agenda will inform the Department's new programmes and consequently shape future plans for Merlin, which will be communicated to the MAB.
- 4.2 Work Choice has been extended with Merlin accreditation by April 2016 made mandatory for the prime providers. Most have already been accredited either as part of other DWP programmes or through opting for voluntary assessment.
- 4.3 DWP may exercise its right to extend the Merlin Standard service concession for up to 2 years but this will involve no material changes which would require a fresh procurement exercise.
- 4.4 JMa added that with the extension of the Work Programme contacts, reassessments are due next year. New contracts for accreditation include New Enterprise Allowance (NEA) for which assessments have been scheduled for later this year and English for Speakers of Other Languages (ESOL). The Youth Contract will end shortly but reassessment will be necessary where the 2-year accreditation lapses before the end of the contract.
- 4.5 Youth Engagement Fund is the first contract with the Social Investment model to which Merlin will be applied. Due to the nature of contracts, DWP is allowing 15 months – an additional 3 months - from contract start for accreditation. The 4 organisations involved will be assessed in 2016.
- 4.6 SS stressed the need to emphasise that Merlin is about continuous progress to which DH responded that assessments are expected to be tougher to ensure primes continue to improve. RR advised that ASL are planning a webinar in January to highlight the higher expectations at reassessments.
- 4.7 The 35 ESF 2014/20 contracts will involve incorporating Merlin into the Local Enterprise Partnerships (LEP) service delivery requirements to make it mandatory for those with supply chains. TD noted that this would bring in smaller organisations for Merlin assessment and would improve the standard of LEPs' supply chains.

**Action Point 1: JMa to check that LEPs have been made aware of the need for Merlin accreditation.**

**5 emqc update –Ruth Regan**

- 5.1 RR advised that emqc Ltd have had a name change to Assessment Services Ltd (ASL) to clearly reflect the nature of their business. Apart from this, it remains the same organisation established in 1993.
- 5.2 She circulated a comprehensive report of planned assessments with details including dates, number of supply chain partners and whether accreditation was mandatory or voluntary.
- 5.3 ASL had completed a Strategic Review of People Plus which includes a merger of A4e and Avanta, both Merlin accredited DWP Work Programme prime providers. It has been decided that as the 2 primes remain distinct legal entities with separate DWP contracts, full reassessment will be undertaken when due, next year.
- 5.4 RR explained that before undertaking a Strategic Review, ASL send out a 'Changes and Mergers Profile' template for completion. Organisations are expected to inform ASL of any material changes. DH offered DWP help in collecting information.
- 5.5 More assessors are being recruited in preparation for the greater volume of assessments coming up next year. Training for new assessors will include shadowing the upcoming NEA assessments.
- 5.6 RR presented the Merlin Management Information Report and welcomed suggestions for improvement. The report will be circulated in future as an Excel spreadsheet to facilitate data manipulation. JMa requested data on the number of accredited organisations and assessment ratings.
- 5.7 JMa presented a table of volumes and scores demonstrating that organisations tended to score 'Good' or 'Satisfactory' at first assessment with much better results the second time. This demonstrates the rigour of the process and negates the perception that most organisations are rated 'Excellent'.
- 5.8 DH commented that DWP category managers review Merlin reports and agree plans with primes to ensure improvement. Members agreed that by the second assessment, there has generally been significant improvement around supply chain development and 'Review' which primes may not be in a position to fully demonstrate the first time.

## **6 Merlin Research Report - Jane Malbasa**

- 6.1 Since the last meeting CESI have completed work and submitted the final report to DWP. This followed extensive Q & A, and review of content and methodology with the MAB and other stakeholders. The conclusions remain the same.
- 6.2 The Review is going through DWP internal process for publications. A brief Departmental response will be published with the Review on 'gov.uk' with links to the Merlin website and other partners' websites. The document will become part of DWPs library of publications in the public domain. DWP is now considering its more in-depth response.
- 6.3 PWA reiterated the need to keep reinforcing that Merlin is about behaviours and approaches, while SW emphasised that the message needs to be that Merlin is about transparency, engagement and education; but cannot help with negotiating contracts.
- 6.4 SW suggested that CBI could be approached to promote Merlin to members and Cabinet Office/NCVO Masterclasses for contractors could also be used. LCC added that NCVO and ERSA could help reach large numbers by raising awareness with members.

## **7 The Merlin Review Recommendations Strategy – Jane Malbasa**

- 7.1 JMa took members through the recommendations and invited comments. The Merlin Communication Strategy needs to be reviewed, and 'Frequently Asked Questions' developed to tackle myths about Merlin which persist.
- 7.2 The myth that the Standard does not have enough 'teeth' needs to be debunked. Failure by organisations mandated to achieve accreditation, amounts to breach of contract which can lead to loss of the benefits of market shift and ultimately termination of contract. An unsuccessful organisation must rectify problems identified in its assessment report and obtain accreditation within a 6-month deadline to avoid penalties.
- 7.3 SS requested that the final document is circulated for further consideration.

**Action Point 2: DWP to send Recommendations to members for further comments and suggestions.**

## **8 Any Other Business**

- 8.1 DH thanked members and closed the meeting.

*The next meeting of the Merlin Standard Advisory Board will be at 12:30 – 15:00 on Thursday 28 January 2016, in room LG2 Caxton House.*