



**merlin**

promoting supply chain excellence

**ADVIZA**

Assessment Dates: 08/11/2017 to 10/11/2017

**ASSESSMENT SERVICES**  
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## 1. About the Organisations

Adviza is a registered charity based in the Thames Valley. Its aim is to inspire people to make better decisions that help them progress in learning and work. A particular focus is helping young people progress in education, employment and training. As well as delivering projects on behalf of local authorities, other public bodies and charities, a key part of its work is providing careers services direct to schools, colleges, parents, graduates and other individuals. In terms of supply chain management, Adviza states that *"Supply Chain Partners enable us to deliver services for young people and adults without duplication and keeping to our ethos of raising aspirations, confidence and skills and allowing customers to progress and sustain work or learning."*

Adviza's current delivery of services includes delivery of the information, advice and guidance (IAG) service for young people in Buckinghamshire, the National Careers Service (NCS) in the counties of Buckinghamshire, Oxfordshire, Berkshire, Swindon, Wiltshire and Gloucestershire, the Prince's Trust Programme in Berkshire and Buckinghamshire, the social impact bond service called Energise, a Big Lottery/European Social Fund project Building Better Opportunities (BBO) known as Building Futures and a STEM project called World of Opportunity (WOOP). Each of these has Supply Chain Partners that enable Adviza to deliver the services for young people and adults to raise confidence, aspirations and skills in applying for and securing employment or further training/education. In terms of percentage of delivery by Supply Chain Partners this is as follows:

BBO: 19.6% Adviza/80.4% supply chain  
STEM WOOP: 46.4% Adviza/53.6% supply chain  
NCS: 65% Adviza/35% supply chain  
Energise: 82% Adviza/18% supply chain  
Bucks Skills Brokerage: 80% Adviza/20% supply chain  
Lucky Break: 80% Adviza/20% supply chain.

Since the previous Merlin review assessment in 2015, Adviza has embedded the learning from managing the NCS supply chain in the newer activities such as the BBO contract and the STEM WOOP activities. Of particular note has been the development of supply chain design activities in the BBO project which has been a two-year process of design and development with full involvement of Supply Chain Partners. The recent senior management restructure also builds on developments in strategic service management.

## 2. Assessment Methodology

Adviza was successfully assessed and accredited against the Merlin Standard in December 2015, and as a result was due the two-year reaccreditation assessment. The purpose of the assessment was to review the position of Adviza against the Merlin Standard, establish improvements since 2015, identify areas of strength and those to consider for further improvement.

The assessment team comprised of Susan Smith (Lead Assessor) and one team Assessor (Lorna Bainbridge) supported by a coordinator within Adviza. The Lead Assessor and coordinator started planning the assessment in August 2017 whereby the logistics of the assessment were identified, and the on-site dates and a schedule of activities agreed to ensure specific timescales were achieved. All Supply Chain Partners involved in supporting Adviza deliver its services were informed of the assessment via email by the coordinator of the assessment and all received the Assessment Services online survey.

The Lead Assessor was in regular contact with the coordinator prior to the on-site to review the scope, schedule and logistics. Prior to the on-site activity all documentation required for the assessment; Self Assessment Questionnaire, Pre-Assessment Notes and interview schedules were shared within the agreed timescale.

The assessment team spent two days on-site. This included reviewing documentary evidence including those relating to supply chain design, improvement plans, environmental sustainability, TUPE, communications and contract and performance management. Interviews were also undertaken whilst on-site with Adviza staff including those involved in the strategic and day-to-day development and management of the Supply Chain Partners. Sixteen Supply Chain Partner organisations were interviewed as well as two past Partners and two people involved in TUPE transfer.

Following the interviews verbal feedback was provided to the Head of Compliance and coordinator of the assessment as well as other key internal stakeholders; this indicated the findings against the principles of the Merlin Standard, areas of strength and those to consider for further improvement.

### 3. Assessment Outcome

Overall %	%
Overall Outcome	83% Good
Supply Chain Design	93% Excellent
Commitment	81% Good
Conduct	79% Good
Review	80% Good

## 4. Areas of Significant Strength

A number of significant strengths and areas of excellence in practice were identified during this Merlin assessment and summaries of these are given below. The numbers in brackets refer to the criteria of the Standard to which the areas relate.

- Supply Chain Design is a vastly improved area of practice for Adviza. There is greater research, a clearer understanding of commissioners' objectives and more action taken to identify and work with potential Supply Chain Partners prior to the submission of any bid. There is now a greater focus on developing wider partnerships and networks that support customers and other stakeholders, for example charities, recruitment agencies and training providers. (1a.1,1a.3)
- There is very clear understanding by Supply Chain Partners of the key contacts in Adviza. This means that queries and concerns are quickly and efficiently handled. (2a.4)
- There is very strong Supply Chain Partner testimony to support that Adviza operates in a positive and supportive manner. An example is the help from the Compliance Team to support small charities in understanding and delivering complex Big Lottery paperwork requirements. There is a culture whereby communication is open and honest, and Partners confirm that they could talk about any issues relating to the contract or more broadly about the service being delivered. (2a.5, 3a.3)
- TUPE experiences have been well managed. One Supply Chain Partner commented that they would recommend Adviza HR to support other partners with such a process. There was a good understanding of legal requirements and effective support put in place not only for Partners but for individuals affected. (3a.2)
- There have been significant improvements to the delivery of the quality and compliance function in Adviza. Supply Chain Partners comment that quality and compliance activities give them useful examples of what good and excellent practice looks like, for example, providing sample customer files and action plans, and delivery of a session to demonstrate what compliance looks like in the context of the relevant contract. (3b.1, 3b.8)

## 5. Areas for Improvement

The following areas for improvement-could be considered for review and improvement. The numbers in brackets cross-reference the findings to the relevant element and criteria of the Merlin Standard.

- Consider how consultation on the design of systems and processes can be made more robust across all contracts. Supply Chain Partner testimony was variable across contracts in this regard. (2a.2)
- Whilst the contract management structure is in place to consider health and safety, safeguarding and data and asset security, Adviza is encouraged to ensure this approach is taken across all contracts. In order to ensure data security is up to date, it may also wish to consider a review of passwords issued to Supply Chain Partners and delete any unused accounts. (3b.4, 3b.5, 3b.6)
- Consider the benefits of developing a supply chain directory which would give quick and easy access to potential partners for new opportunities. The new CRM may provide an ideal opportunity for this. This would also provide Adviza with assurances of the range of Supply Chain Partners. (1a.2)
- Adviza is encouraged in its plans to develop a continuous quality improvement plan across all contracts. This would ensure comprehensive self-assessment across all activities and determine where there are common themes for improvement. This may be helpful when determining the agenda for pan-supply chain meetings. (4a.2)
- On the Buckinghamshire Skills Brokerage contract, consider whether sharing overall performance information with the wider network of training providers would help them set their contribution in context. (3d.6)

## 6. Areas Requiring Significant Development

Although the Merlin Standard overall has been achieved with a 'Good' outcome, there is one criteria within the requirements of the Standard where limited evidence was presented and requires significant development in order to support the organisation to achieve excellence in supply chain partnership working. The numbers in brackets cross-reference the findings to the relevant element and criteria of the Merlin Standard.

- Adviza is aware that environmental sustainability needs to be reviewed with all Supply Chain Partners on an ongoing basis and not just at the due diligence phase. It is therefore recommended that action is taken with regards to environmental sustainability. (3b.7)

## 7. Findings Against the Merlin Standard

### 1) Supply Chain Design

#### 1a) Supply Chain Design

Adviza's supply chain design is underpinned by its vision and values, putting customers at the heart of the design and approach. Adviza continues to use its long-standing position in and knowledge of the local labour market and partners to design supply chains to meet the needs of the various commissioners and contracts it holds. It also uses national and local labour market information evidenced and others' data, for example from Jobcentre Plus and the Department for Education, academic research and local knowledge including Local Enterprise Partnerships (LEPs). There is a new 'decision tree' process that enables the senior leadership team to make decisions on opportunities. The Procurement and Commissioning Policy sets out the process of selection of Supply Chain Partners, where appropriate. It ensures that potential Supply Chain Partners who have sufficient capacity, capability, quality and business standing have a fair opportunity to be selected to deliver the required provision. Adviza also considers previous successful delivery. The approach may differ according to the style of tendering by the funding body, for example on the STEM WOOP project potential partners were named in the bid as being appropriate to reach under-represented target groups to engage with the STEM agenda.

Adviza ensures that Supply Chain Partners support the geographic and customer types it is seeking to serve through its delivery of services and design supply chains accordingly. Communication about opportunities to join supply chains are a mixture of direct approaches to known and trusted partners, through open calls for partners on the Adviza website and through research. By sharing all commissioners' information and Adviza's own delivery share of contracts, Supply Chain Partners confirm that the tendering process is open, honest and transparent. There is a clear rationale for selection of Supply Chain Partners and scoring of Expressions of Interest takes place by an internal team which offers the opportunity for moderation. Supply Chain Partners are notified of being successful and why they have been so. Unsuccessful organisations are given robust feedback.

A good mix of Supply Chain Partners was found for all commissioned services, including private, public and third sector organisations such as colleges, social enterprises, private training providers and charities. The five-stage procurement approach has remained since the assessment in 2015.

In addition to the formal supply chain, Adviza has developed an extensive additional support network that adds value at all levels and the organisation has strategically positioned itself to both influence and be informed of local and national issues - for example, the CEO is Chair of Careers England. Adviza board members are drawn from differing organisations and add value with their range of expertise. Other networks include membership of the regions LEP sub-boards and Skills Boards, partnerships exist with schools, colleges and universities and to support the social agenda and develop comprehensive pathways for customer support there are partnerships with social services, drugs agencies, housing providers, offender support agencies and health providers. Adviza remains well connected within the geographical areas it operates in and makes efforts to ensure it is engaged in both formal and informal networks within these areas.

## 2) Commitment

### 2a) Collaboration, Cooperation and Communication

Adviza provides information to potential Supply Chain Partners about its procurement process through meetings, telephone calls and emails. Supply Chain Partners who had experience of the procurement process used by Adviza confirmed that communications during all stages of activity were proactive and relevant, and proportionate to the service being procured. One Partner spoke about being contacted directly to explore the opportunity to partner with Adviza. In the new BBO contract communications were cited by Supply Chain Partners as being through telephone, email, Google Drive, What's App and a weekly newsletter.

Consultation has taken place with Supply Chain Partners about its systems and processes. Examples included a request to simplify the financial arrangements and as a result the process was streamlined using lean processing techniques and a new system has been implemented. In the STEM WOOP steering group there was consultation and agreement to standardise a set of Survey Monkey evaluation questions for large and small events. In the NCS supply chain, quality reporting checks have evolved after consultation such as agreed Skills Action Plan benchmarks and professional practice audits. There were some comments by Supply Chain Partners however that this could be more systematic; for example, on the BBO contract there is room to agree processes such as risk assessment and also the opportunity to learn from other projects operating across the country.

Collaboration across the supply chain is encouraged by Adviza. Supply Chain Partner comments include: *"We work well as a steering group, and after the second meeting we were sharing our delivery models"*, *"Partners collaborate and open up training to others"* and *"Other partners have opened up their training to the supply chain, like the College."* There are regular meetings to address any emerging issues, share best practice, update knowledge and participate in action learning. Adviza's senior managers met with BBO supply chain recently to help address early teething issues and there was positive feedback from the partners regarding these meetings in relation to increased understanding of contract requirements and meeting deadlines. Whilst there is some variation in approach between contracts, as a baseline every Supply Chain Partner has a minimum contact of a quarterly meeting, as per the Contract Compliance Handbook. Another example of collaboration is the sharing of an online diagnostic tool which is used as part of the project.

Communication channels and business relationships between Adviza and Supply Chain Partners are clear and understood. There are regular communications by email, telephone, Skype and in person. All supply chain organisations know who the key contacts are, all have a contract lead with a named member of Compliance Team support, Head of Contract Assurance, Finance and Management Information (MI). Supply Chain Partner testimony supported that they are very clear who the contacts are for delivery, marketing and compliance and that these individuals are accessible and responsive to queries. One Supply Chain Partner commented that *"Overall communication is good, contacts are available and responsive."*

The culture of communications is open and honest. A member of staff commented that *"Integrity is the driver."* The lines of communication are open and Adviza has listened to feedback. For example, when NCS Supply Chain Partners felt bombarded by emails, Adviza set up a shared

online space to resolve this. Supply Chain Partners talk about *"openness and honesty"* in all that Adviza does and it is clear that this is part of the Adviza way of working, which is an area of strength. Comments from Supply Chain Partners included: *"Communication is good, if I have a concern I can discuss it, it is open and honest"*, *"I believe communication is open and honest"*, *"Communication is always positive and open.... able to talk about anything"*, *"Able to talk openly and candidly with Adviza and vice-versa"* and *"Trust exists between the two parties, we can openly discuss anything."*

## 2b) Developing Supply Chain Partners

In order to support the sustainability and viability of Supply Chain Partners, contract reviews convey how profiles will impact their income stream and tactics are discussed as to how they can realistically maximise this in a timely fashion. Adviza develops and facilitates a range of relationships in support of its supply chain and works to utilise these across operations. For example, a partnership with Microsoft has been deployed across the organisation to promote IT careers and an event in partnership with the Federation of Small Businesses provided input to Supply Chain Partners on presentation skills. Adviza staff also talk about providing informal advice to help Supply Chain Partners develop, for example, Adviza shared a policy which the Supply Chain Partner needed to update, and this was adopted.

Supply Chain Partners are assisted to develop their business propositions by receiving information about funding and partnership opportunities. Adviza uses a variety of opportunities to promote Supply Chain Partners' offers and include them in new tenders. There are regular presentations at Adviza and contract Board/steering meetings that share funding opportunities. For example, Adviza had funding to promote apprenticeships to adults which was shared with some Supply Chain Partners and another example was additional funding secured in one county for those needing more intensive support than NCS funding easily allows. News of funding opportunities is also promoted through newsletters and social media.

Adviza supports and encourages the development of all Supply Chain Partners. Adviza has continued to provide training to the supply chain through access to its Moodle online training site and to raise the quality of IAG it has supported advisers to achieve the Level 6 qualification. Supply Chain Partners commented: *"It's a complex contract and Adviza staff have been really supportive providing training, including one-to-one to ensure we understand the compliance requirements and reporting"*, *"I've been supported by X and the 'idiots guide' coming back into the contract so that I understand the funding arrangement and measures"*, and *"I have a new adviser and she will start her L4 in IAG internally, but Adviza will provide all the system training, and support required with the paperwork."*

## 2c) Contracting and Funding

Adviza continues to manage processes and procedures to support procurement effectively in line with the requirements and expectations of the commissioners. Adviza is active and open about encouraging prospective Supply Chain Partners to come forward. Supply Chain Partners stated that there is a clear process that is easy to follow; for example, they are invited to a partner meeting and asked to present their offer to demonstrate how they would resolve or deliver the programme to achieve the outcomes. This was subsequently scored using a matrix which Supply Chain partners were aware of. All successful partners were invited to a development meeting to

start the on-boarding and any unsuccessful partners were advised of the outcome - some have subsequently been invited to bid for other contracts.

As there are several commissioners, there is a range of financial models in place. With larger contracts, a range of delivery mechanisms are modelled both centrally and with potential Supply Chain Partners before arriving at the final tender submission. With the other contracts there is less commissioner flexibility about financial models, although Adviza's strategy continues to be about enabling as much funding as possible to flow to Supply Chain Partners. Supply Chain Partners confirmed that discussions about finances took place and that they are fully aware of the funding model used prior to contracting. Contracting considers the potential risks to Adviza and the Supply Chain Partners and optimises the targets to deliver a realistic income stream agreement.

Contract documentation is in place for all Supply Chain Partners and is seen to be clear and understandable. Work has been undertaken to ensure Supply Chain Partners understand the contract terms and are encouraged to seek their own legal advice, if required. The roles and responsibilities for both the Supply Chain Partner and Adviza are clearly defined. Supply Chain Partner testimony confirms this *"It is very clear what is expected of us from the contract."*

Adviza described how market share was discussed as part of the bidding activity and then negotiated with each potential partner organisation based on the contract or project requirements. Post contract, there are examples within the supply chain of negotiations taking place to move market share to support successful delivery partners. It was found that Adviza works with Supply Chain Partners according to contract needs and their abilities to apportion market share and balancing expertise, finance and risk. Whilst Adviza recognises that choice for customers is good, it is also important that Supply Chain Partners are not competing in a limited market; for example, in NCS there is a geographical spread of delivery and support in specialist areas.

At the point of contracting with Adviza, partner organisations agree the payment profile which varies between contracts as some entail a payment by output or payment by profile element. For spot-purchase Supply Chain Partners, a rate for the service is agreed. Supply Chain Partners confirmed that Adviza has been sympathetic to contract variations and has adjusted fee and re-profiling to support their delivery as illustrated by one Supply Chain Partner's comment *"We achieved 100% last year, and they were going to give us less, I appealed and asked for growth."*

The transfer of funds within the partnership network continues to be managed by Career Connect with whom Adviza has a hosted finance service. The invoice and payment processes are clearly set out and understood by Supply Chain Partners who judge the process fair and accurate. One Supply Chain Partner reflected *"We missed sending the September invoice and when I spoke with X it was dealt with really quickly, and we got paid."* Adviza finance staff have good systems that reconcile the MI with the payments and there is a back-up facility for same-day payments should the need ever arise.

Adviza remains transparent about the support it provides for the management fee levied. This includes the overall communications and negotiations with commissioners, provision of and support for the MI system, management of the payments, contract management, support and training for Supply Chain Partners. Partners themselves felt that the 10% fee levied in the NCS

was particularly fair, especially given the prompt MI support service provided. In other contracts, no management fee is charged.

### 3) Conduct

#### 3a) Demonstrating Commercial and Business Integrity

Adviza's vision and values remain clear and understood by all staff and Supply Chain Partners. These include being honest, transparent and ensuring that the customer is at the heart of everything and are communicated through the website, business plan, contracts and other communications. Many Supply Chain Partners stated that they enjoy being a Supply Chain Partner due to sharing values. The Partnership agreement outlines shared values. Supply Chain Partner quotes included *"Our values are similar to Adviza; we both support young people, provide opportunities and treat people fairly"* and *"I know that they are passionate and person centred, and respect people, which is what we aim to do."*

There have been two incidences of TUPE transfer since the last Merlin review (one in and one out). Adviza demonstrated how it fully complies with TUPE regulations. For those affected, the process was felt to be exceptionally well-managed and staff who transferred confirmed this to be the case. Comments in support of the excellent practice included *"I've recommended Adviza HR to other Partners as they were knowledgeable and responsive, and made the process easy"* and *"Very effective process within a short timeframe."*

All Supply Chain Partners reported on supportive and positive relationships and interactions with Adviza. See section 2a and other examples throughout this report. Supply Chain Partners comments supporting this included: *"Very positive and supportive, it's about the people not the numbers"*, *"Very positive, very supportive"*, *"They are open, positive and supportive, and recognise the timescale for the delivery is difficult"*, *"X is supportive and encourages us to look at alternative ways of delivering the service"*, *"X is really supportive and building the relationship with the job centre to gain referrals"*, and *"If we are open and honest, and have a plan, they are really supportive."*

Most Supply Chain Partners confirmed they receive updates on various topics relating to legislative policies and procedures relating to contract compliance through email correspondence. Adviza reviews, maintains and updates its policies using the ISO9001 framework and has an audit schedule and corrective action request log. It routinely provides updates on legislation and key economic drivers, for example the Apprenticeship Levy and Prevent Duty. The new Child Protection, Safeguarding and Prevent Policy was summarised at one of the Sharing Best Practice days for Supply Chain Partners. Checking of use by Supply Chain Partner staff of the online information portal ensures that checks are in place and that information is being read and acted upon.

#### 3b) Quality Assurance and Compliance

There has been extensive investment in the quality assurance team over the past year which has built a solid foundation and ensures Supply Chain Partners understand the contractual requirements of deliverables, including compliance. Adviza operates to ISO standards and has a quality system which includes the auditing of supply chain processes. On the NCS, BBO and STEM WOOP contracts, all measure and monitor Supply Chain Partners against a set of clear criteria including targets and key performance indicators. Meetings occur on a quarterly basis to formally review progress against the performance-monitoring schedule which includes

quantitative and qualitative criteria. Each has a named Compliance Coordinator to support them. Quality monitoring includes Observation of Professional Practice (OPP), quality and accuracy of evidence - such as individual learner records/action plans, client feedback through on-line surveys and questionnaires - and review of health and safety, data security, equality and diversity and safeguarding issues. Other contracts such as Bucks Skills Brokerage, Lucky Break, Princes Trust and Energise have fewer Supply Chain Partners so have fewer formal reviews. All are flexibly responsive to interactions depending upon performance, however Supply Chain Managers meet monthly on most contracts especially with those underperforming to drive and support improvements. Since the last Merlin reaccreditation, the management and support for Supply Chain Partners has been improved through quarterly Supply Chain Partners events to share information and best practice, a named contract manager for each organisation, and the introduction of a robust contract review framework.

Adviza utilises the findings of quality assurance activity to inform and improve delivery. The Compliance Coordinators have regular meetings and share issues and good practice across the contracts. Examples found during the assessment of improvements included where evaluation indicated that some young people grasped a particular concept whilst others failed, so the learning was that if the event ran in the future they would look at androids and robotics. Also, training of Supply Chain Partners to improve paperwork compliance was noted.

Adviza provides effective and supportive IAG to Supply Chain Partners. As its core business is careers guidance, it is effective at ensuring that all contracts have embedded IAG delivered by highly qualified staff. All the NCS supply chain are **matrix** Accredited and earlier this year the NCS received across the board good grades in its first Ofsted inspection of this service. Partners themselves are aware of the importance of ensuring any IAG they provide is accurate, up to date and impartial.

Adviza has a data consent and information sharing policy that it implements across all aspects of its work. Contracts exchanged with Supply Chain Partners include requirements aligned to Adviza's own policy and/or those of the commissioner. This is the case for Health and Safety and safeguarding also. Data security, health and safety and safeguarding practice is robustly checked at the start of contract delivery and during the life of the contract. It was clear from Supply Chain Partners that the security of information relating to customers' personal data is important. There is little robust evidence around environmental sustainability. Adviza is aware that environmental sustainability needs to be reviewed with all Supply Chain Partners on an ongoing basis and not just at the due diligence phase. It is therefore recommended that action is taken with regards to environmental sustainability. This area could be more consistent across all contracts.

Adviza highlights good or excellent practice during individual conversations or meetings with Supply Chain Partners. It is also discussed at the Adviza senior leadership team meetings and there were examples of good or excellent practice being identified and shared within the supply chain. Good and excellent practice is shown to Supply Chain Partners in the form of sample files and what a good or excellent customer journey flow should look like. Sharing of practice is a regular feature of meetings, with one member of staff commenting *"I did an exercise at the steering group to share what compliant/non-compliant looked like and best practice."* Supply Chain Partner quotes illustrate the sharing of practice as follows: *"I shared the fact that we could work in partnership with the Job Centres to avoid competition and all of us going in as individuals", "We are*

*talking about moving away from job clubs to health and well-being clubs to appear more appealing to clients”, and “We share good practice through the meetings and What’s App.”*

### 3c) Honouring Commitments

Pre-contract communication with potential partners continues to take place in a variety of ways, for example, with groups of potential partners, in meetings with individual potential partners and via emails and telephone calls. These discussions included negotiation around quality, value for money and delivery. The formality of discussions depends on the size of the contract and the specific requirements within the funding regime (for example ESF, Education Funding Agency). These requirements are made clear to partners at pre-contracting stage and reiterated or updated throughout the life of the contract. Monitoring meetings take place at least quarterly and Adviza agrees with partners the style of monitoring that takes place. As there are often specific requirements within the funding regime, Adviza makes requirements clear to Supply Chain Partners at pre-contracting stage and these are reiterated or updated throughout the life of the contract. Supply Chain Partners also shared several examples of post-contract negotiations where they had been able to negotiate an increased offer and/or some re-profiling or re-allocations.

Whilst there is a dispute resolution process outlined on Adviza contracts, Supply Chain Partners felt the relationship with Adviza would mean that informal methods would be their preferred initial option. As Adviza doesn't currently hold any contracts where the commissioner requires the use of the Merlin Mediation Service, this has not featured in the assessment.

Within the different supply chains led by Adviza, there is an understanding of what each party is and should be doing. Delivery plans ensure that both Adviza and its Supply Chain Partners are still honouring what was agreed prior to contracting.

### 3d) Performance

As described in section 2a of this report, collaboration is strongly encouraged to improve performance within supply chain areas but not necessarily across them. Linking to criteria 4a.2 Adviza is encouraged in its plans to develop a continuous improvement plan across all contracts. This would ensure a comprehensive self-assessment across all activities and determine where there are common themes for improvement. This may be helpful when determining the agenda for pan-supply chain meetings.

Supply Chain Partners are very clear about what they need to achieve and have contractual schedules and programme plans in place which detail the outcomes required on a monthly basis. Performance reviews between some Supply Chain Partners and Adviza have been taking place at least quarterly. Supply Chain Partners commented *“Adviza understand the complexities of the contract, and the challenges, which we are able to discuss every month”* and *“They understand things happen; an adviser went off sick and I couldn't upload the information – it is about being open and honest with them and they work with you.”* Partners gave positive feedback on the openness and content of these performance meetings describing how Adviza works closely with them to

measure, monitor and manage the work they deliver, so that they can achieve high quality outcomes.

The MI system used in each contract or project varies according to the funding and contractual requirements. All members of the supply chain receive timely and accurate MI on performance for themselves and the contract as a whole. Whilst the MI system contained a wealth of data, Adviza did not feel it had been routinely interrogating this data or using it to inform delivery and so has improved the data available since the last Merlin assessment. This is now analysed through the Performance Management Group - there has been the addition of new fields to the database, for example, length of time unemployed, to increase the richness of the data analysis. The MI system used in each project varies according to the funding and contractual requirements. The NCS supply chain receives weekly data reports run from the YETI CRM.

BBO purchased a bespoke recording system as part of IYSS. Bucks Skills Brokerage produces a data analysis report quarterly to the LEP. Progress against targets is discussed monthly at review meetings with BBF. STEM WOOP produces a quarterly report for the LEP and progress against target with the supply chain. Supply Chain Partners across the range of contracts confirmed that the system they use is robust, easy to use and provides good data. Supply Chain Partners also commented on the good levels of training and support provided by Adviza staff to interrogate performance.

Overall, Adviza has taken a number of steps to ensure cost efficiencies and value for money. There is use of premises for meeting customers across the partnership to best meet their needs and ensure best value. The company-wide risk register as a tool identifies financial risks to enable discussion at Senior Leadership Team level regarding over or under spending. An example of delivering value for money in practice was shared by one Supply Chain Partner - *"When looking to run a large event it would typically be £20K, for the STEM WOOP events the budget is £10K, so we have to be innovative and seek 'gift in kind', free premises, and other innovative approaches."*

All Supply Chain Partners described the importance they placed on measuring the progress of clients. This is particularly the case for the NCS Supply Chain Partners as it is a key feature of their own **matrix** Accreditation. Methods used across all contracts vary depending on the requirements of the commissioner and include data collection, case studies, client feedback, progress towards or sustainment of education, employment or training.

### 3e) Promoting Diversity and Equality

Adviza continues to hold a strong commitment to diversity and equality. It is specifically highlighted in all bids and documentation for potential partners captures specific information with regard to diversity and equality.

Supply Chain Partners confirmed that the initial due diligence processes they engaged in with Adviza included sharing their policy and a commitment to being positive about equality and diversity. Additionally, there is specific free of charge training provided through the online learning platform provided for Supply Chain Partners.

Client data input into the MI systems include contractual diversity and equality categories such as gender, race and disability. The NCS contract itself has targets to work with the most

disadvantaged customers from specific priority groups. In other projects and bids there are specific targets for representation of minority ethnic young people and representation of male and female participants. Data about diversity and equality is monitored and shared with partners who respond accordingly to ensure actual participation within the project reflects the requirements of the commissioner. A good example of diversity and equality being used to improve services is on the BBO contract whereby less females are currently participating and so marketing is being adjusted to attract this group to the programme

## 4. Review

### 4a) Supply Chain Review

Adviza has clearly defined its stakeholder groups and it was found that they play an active role in receiving and giving feedback on the impact of the contracts and projects being delivered through the supply chain. The Adviza consultation cycle includes participant feedback through meetings, the use of observation of activities, questionnaires and feedback from stakeholders such as Board members, staff, volunteers, young people, adults, schools and colleges, parents, voluntary sector organisations and national and regional partners. Adviza also uses feedback from other activities such as inspections and audits and shares these with Supply Chain Partners.

Adviza has a process for generating an annual continuous improvement plan which is mainly operational currently in the NCS contract as the others are too early in their delivery phase to be engaged fully in this. The Adviza consultation cycle includes Supply Chain Partner customer feedback. The results are reported both to the relevant Supply Chain Partner and to the Senior Leadership Team and this also feeds into annual continuous improvement plans.

Most Supply Chain Partners interviewed were aware of the wider policy and strategies of commissioners. For example, the Universal Credit roll-out by DWP and the apprenticeship reforms led by the EFSA. This is communicated through meetings and emails and the Adviza website where policy changes and report and analysis are provided.

Both Adviza and Supply Chain Partners were able to share numerous examples of how the work they are delivering is having a measurable impact on the commissioners' wider social objectives. This included gaining and sustaining employment, improvements in adult skills and qualifications, unemployment reduction, NEET reduction and impact on attendance, and attitude and behaviour of school-age young people (pre-NEET). In the Bucks Skills Brokerage contract some 70% of employers will undertake further training as a result of being involved in the project. In terms of young people, 85% receiving intensive support move into employment, education or training vs 75% where there is no intervention with Adviza. The NCS work has resulted in 44% fewer people claiming Jobseeker's Allowance two years post intervention vs those who had accessed the service.

The outcomes of the various processes and mechanisms to review and develop the supply chain have given rise to some changes, including the loss of organisations from the partnership and the introduction of new organisations with different delivery methodologies.

As outlined above, Adviza and the activities of its Supply Chain Partners are positively impacting on external stakeholders. Adviza takes staff and employee wellbeing seriously and has a range of

policies around this. It has employed apprentices as a role model for Supply Chain Partners to do the same. BBO procured Buckingham Canal Society, who provide work experience and have raised awareness with customers and the network of the benefits of restoring the canal, its history and encouraging its usage, is a good example of community sustainability action taken. Supply Chain Partner quotes illustrate the benefits further as follows: *"Improved self-confidence and self-esteem, along with employment has been the greatest impact", "It is about moving people into work, but self-confidence, self-worth and motivation are key findings, and I always say – take a week off if you feel the need but always come back and continue the journey", and "Reduced worklessness, improved the skills and abilities of people."*

## 8. Conclusion

Since the previous assessment in 2015 it was evident to the assessment team that Adviza has taken on board the previous feedback and has developed particularly in the area of contract compliance and quality.

The review assessment confirmed that the fundamentals of excellent supply chain relationships such as a culture of openness, trust and excellent working relationships remain very well established as strengths of Adviza.

This assessment provided the opportunity to review the Adviza practices for the current contracts and projects against the Merlin Standard and consequently, if it gained other contracts whereby a supply chain was used to deliver the service, consideration should be made to the requirements of the commissioner against the Merlin Standard. The senior leaders should be mindful that any change or additional contracts, for example a new contract using a significant supply chain, may require a strategic review to ensure the organisation continues to operate in line with the Merlin principles.

In November 2019 Adviza will be expected to undertake a further assessment against the Merlin Standard in order to retain the accreditation. However, due to the commitment to continuous improvement consideration could be made to a continuous improvement review being undertaken in November 2018. The purpose of the review would be to establish progress made against the areas recommended for further improvement following this assessment.

Assessment Type	REVIEW
Assessor's Decision	STANDARD MET
Lead Assessor's Name	SUSAN SMITH
Visit Date	08/11/2017 – 10/11/2017
Client ID	C11454
Assessment Reference	PN103090