



merlin

promoting supply chain excellence

CDG-WISE Ability

Assessment Dates: 05/12/2016 & 06/12/2016

ASSESSMENT SERVICES

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1. About the Organisations

CDG-WISE Ability was created in 2009 as a special purpose vehicle (SPV) by Careers Development Group (now merged with Shaw Trust) and WISE Employment. It is a separate company limited by guarantee with its own Board of Trustees.

It was formed to tender for the Department for Work and Pensions' (DWP) Work Choice contract across Hampshire and the Isle of Wight (Contract Package Area 24). Currently, Work Choice remains the organisations only contract delivered through the support of Supply Chain Partners.

Initially, CDG-WISE Ability delivered the Work Choice contact using a 'managing agent' model, meaning 100% of programme delivery was carried out by members of its supply chain. However, when a National provider withdrew from the Work Choice programme, a strategic decision was made that due to the small percentage of market share to re-allocate, and the maturity of the Work Choice contact, the 10% provision would be taken in-house.

CDG-WISE Ability is committed to working with partners who share and support their core principles, to work towards a society in which sustainable employment is available to all.

The core principles CDG-WISE Ability and their Supply Chain Partners embrace are:

- Innovation and integrity in the way the partnership network is managed
- Achieving and maintaining excellent performance and a quality service
- Encouraging customer self-sufficiency and empowerment and
- Employment.

To ensure overhead costs are kept to a minimum, CDG-WISE Ability is supported by the infrastructure of Shaw Trust with regards to accounts, HR, marketing, security and IT.

CDG-WISE Ability was successful in gaining the Contract Package Area for the Work Choice programme, which started in October 2010 with four Supported Business Providers and three Tier 2 end-to-end Supply Chain Partners.

2. Assessment Methodology

The planning process began in July 2016 when CDG-WISE Ability submitted their formal request to be re-assessed against the Merlin Standard.

Once it was agreed that the on-site visit would take place on the 5th & 6th December 2016, the assessment team comprising of Ruth Regan (Lead Assessor) and one team Assessor: Neil Potentier, was established.

The Lead Assessor was in contact with the nominated CDG-WISE Ability Coordinator (the Partnership Director) before the on-site to review the scope, schedule and logistics. The Merlin Survey was distributed nine weeks before the on-site date. The Self-Assessment Questionnaire (SAQ) and Pre-Assessment Notes (PAN) were submitted in line with the guidelines and within the agreed timeframe. The interview schedules were prepared and shared with the Assessors in preparation for the on-site activity.

During the assessment, 100% of Tier 2 and Protected Placement Supply Chain Partners with whom CDG-Wise Ability deliver the Work Choice programme were spoken to, by telephone or face-to-face interviews. During the assessment, the assessment team reviewed a range of documentary evidence provided by the organisation, interviewed all members of the CDG-WISE Ability team, including members of the Board of Trustees and relevant member of Shaw Trust staff who provides the support services.

Also, the assessment team had the opportunity to talk to employers, partner and Specialist Support Organisations (SSO) who underpin the CDG-WISE Ability delivery methodology.

Following the interviews verbal feedback was provided to the Coordinator of the assessment during which the outcome of the assessment, areas of strength and those to consider for further improvement against the Principles of the Merlin Standard was shared.

Unless otherwise stated, the quotes used within the following report are those made by members of the supply chain network.

3. Assessment Outcome

Principle	%
Overall Outcome	93% Excellent
Supply Chain Design	93% Excellent
Commitment	95% Excellent
Conduct	92% Excellent
Review	93% Excellent

4. Areas of Significant Strength

Significant strengths and areas of excellent practice were identified during this Merlin assessment and summaries of these are given below.

Principle 1

The staff of CDG-WISE Ability demonstrated, and Supply Chain Partners validated:

- A very clear and in-depth understanding of both the commissioner and customer demands
- The mix of experience, expertise, size and sectors across the supply chain was relevant to the requirements of the commissioner and customer group, and
- A wide-reaching and diverse Specialist Support Organisation Network was in place to support the customer journey.

Principle 2

The staff of CDG-WISE Ability demonstrated, and Supply Chain Partners validated:

- Clear, fair and transparent procurement process were utilised
- Communication channels at both operational and strategic levels are clear, robust, honest, and open
- The development of Supply Chain Partner's is all inclusive thus developing individuals and their organisation
- Funding, volumes, fees, etc., are clearly explained and documented and understood by all (relevant to their role), and
- Payment process work very well – including a 'risk adverse' approach to ensuring payments are correct before being claimed.

Principle 3

The staff of CDG-WISE Ability demonstrated, and Supply Chain Partners validated:

- Business and commercial integrity is embedded across the network
- Very robust policies and processes are in place to ensure the security of all data and assets, the safeguarding and health and safety of customers
- Commitments made pre-contract have been honoured throughout the life of the contract
- The network operates in the spirit of true collaboration, and
- Performance expectations are clearly explained, understood and monitored with feedback provided being relevant to need / situation.

Principle 4

The staff of CDG-WISE Ability demonstrated, and Supply Chain Partners validated:

- Stakeholder groups are defined and processes are in place to actively seek feedback from these groups
- Very robust and engaging process used to produce the self-assessment report
- Wider social objectives/policy of the commissioners shared and relevant customer case studies provided, and
- Impact of the supply chain activities on the wider social objectives is shared and understood.

5. Areas for Improvement

The following areas highlighted by the Assessment team should be considered for review, reflection and possible improvement / development.

Principle 1

- The approach taken to procuring the Work Choice supply chain was exceptionally effective. When tendering for new contracts, it will be vital to reflect on the procurement process used and how these might be replicated/refreshed so they remain as effective within a different contract arena.
- CDG-WISE Ability and the supply chain has forged excellent relationships with key stakeholders – including employers. Consideration should be given to reviewing what information is shared with employers about the makeup of the supply chain so that these vital stakeholders gain a full appreciation of the depth and breadth of the abilities of the network.

Principle 2

- When new contracts are gained, and the network of Supply Chain Partner grows, consider how a more formal training needs analysis approach can be systematically used to identify learning and development requirements of staff across the supply chain.

Principle 3

- Ensure environmental sustainability is kept on the agenda, and the process of target setting and monitoring becomes embedded across the supply chain.
- Consider if benefits are to be had by further defining what value for money across the contract means to CDG Wise Ability and the Supply Chain Partners.
- Continue to collect, review and where possible take appropriate action on the Equal Opportunities data collected.

Principle 4

- As planned, moving forwards, consider the benefits to be had of embedding social value monitoring into its contract management framework.

6. Findings Against the Merlin Standard

1) Supply Chain Design

1a) Supply Chain Design

As reported in 2014, the initial procurement strategy was to encourage as broad a group of potential partners as possible to express an interest in joining the CDG-WISE Ability supply chain. Significant research was undertaken with support from an external organisation, and several third sector representative's views were sought. Smaller, specialist and third sector organisations were encouraged and supported to engage with CDG-WISE Ability and innovative approaches, such as workshops, helpdesks and face to face support were used effectively to facilitate this engagement. Applications received were mapped noting the potential partners': business drivers/ethos, delivery specialisms, experience in delivering high-quality services to the customer group, and performance track record. The original tender produced by CDG-WISE Ability in October 2009 names the prospective members of its supply chain. It is a testament to the initial research, strategies, processes and activities undertaken by CDG-WISE Ability to identify the scope required for the supply chain network to meet the objectives of the Commissioner and contractual requirements that all but one of these named organisations remain within the supply chain network today.

"CDG is like a gift to us – and we are helping them achieve what the DWP are wanting which is providing employment opportunities." - Employer

"CDG is constantly reviewing and researching to ensure they are providing the best service to its customers and delighting their commissioners and this also involves feedback and consultation with the supply chain."

A key feature of the organisations selected to form the supply chain was that many of them had pre-existing relationships with one another; this supported a more rapid establishing of cooperative and collaborative relationships. The network of Supply Chain Partners includes recognised charities and organisations who are well established within the CPA and have an in-depth knowledge and understanding of the customer groups and their needs. Up until 24th October 2015, CDG-WISE Ability operated solely as a managing agent for a network of Supply Chain Partners. From 25th October 2015, it took over the delivery of part of the Work Choice contract from a partner who had made a strategic decision to withdraw from the Work Choice Programme at a national level. CDG – WISE Ability now delivers 10% of the Work Choice contract.

"They chose an excellent mix of organisations to start the programme."

The ongoing development of the Register of SSOs continues to support the delivery of comprehensive support services to customers. Typically, the SSO network provides additional support to help customers improve their health and wellbeing. Supply Chain Partners confirmed that the SSO register was a helpful addition which supported the efficient delivery of customer requirements.

"We review the SSO list at least every year to make sure it is still relevant."

"I can now see how we fit in by extending the network."

2) Commitment

2a) Collaboration, Cooperation and Communication

The Partnership Director and her team at CDG-WISE Ability have developed and embedded an approach to collaboration, co-operation and commitment that is acknowledged by Supply Chain Partners as one of the organisations ongoing key strengths.

As highlighted in Element 1, opportunities to partner with CDG-WISE Ability were promoted widely, using press advertisements, email, telephone and through external events. Briefing sessions were delivered, and interested partners were encouraged to attend. These activities helped CDG-WISE Ability ensure that potential partners understood the requirements of the contract and could make informed decisions about the suitability of them joining the supply chain. All potential partners were informed of the outcome of the procurement process, with successful Supply Chain Partners receiving confirmation of contractual information such as market share. Information was initially communicated by email and followed up with telephone discussions, to confirm understanding and provide any additional support. Briefing events and training workshops were delivered before the start of the contract, bringing together staff from all members of the network together to begin the important process of building a fully collaborative and successful supply chain.

"CDG is very good at keeping the supply chain fully informed of anything relevant to the delivery or future delivery of the contract."

The briefing and training workshops established at the beginning of the contract were created as an opportunity to consult with, for example, advisory staff on programme documentation and customer process. Also, Steering Group meetings were established with the principal stakeholders such as JobCentre Plus and DWP to discuss consistency of programme delivery, quality assurance and continuous improvement. This approach to engaging with Supply Chain Partners and stakeholders at both operational and strategic level decision making remains at the heart of the CDG-WISE Ability's approach to supply chain management. Thus, Supply Chain Partners confirmed that CDG-WISE Ability has continued to actively seek feedback and consult with them (and other stakeholders) when designing, modifying or improving its systems and processes. Supply Chain Partners commented:

"Full consultation amongst all Supply Chain Partners at a meeting to agree on additions to forms to make them more user-friendly."

"CDG works on a consultative basis not only with management within the supply chain but also delivery staff which engages them with the processes and procedures that have been implemented. It also ensures we take on all the knowledge and suggestions to ensure the best results for our commissioners and customers."

The supply chain network has continued to work together to ensure that customers receive the best possible service. For example, Supply Chain Partners described how customers had been transferred within the supply chain to ensure that they received the necessary support to progress. Similarly, delivery staff from across the partnership network continue to meet at quarterly forums / workshops to discuss common issues, challenges and areas for improvement.

Case conferencing is now a standard feature of the forums / workshops, which supports the delivery of comprehensive services to customers. Supply Chain Partners described how:

"We go and help other partners where they don't have the skills and expertise."

"We work very closely as a supply chain from regular practitioner forums, sharing best practice, support with inductions of new staff members, working with supported businesses to engage and move their customers into open employment, observation moderation. quality forum etc."

"We are one delivery team really – all working for the same outcomes"

A variety of excellent formal and informal communication activities and methods continue to be used by CDG-WISE Ability that result in consistent messages being received and understood by all members of the supply chain. For example, the e-bulletin used by the Partnership Director was described as continuing to provide "...regular, timely updates and information." The recent change to the network which resulted in CDG-WISE Ability embarking on direct delivery was also well communicated – with Supply Chain Partners confirming:

"There was any ambiguity based on CDG becoming a delivery partner."

"You are always kept in the loop – what she (Partnership Director) knows you know too."

"Things are always clarified so we all understand."

"We have a very clear communication process and information is shared in a very regular and open way through contract meetings, provider engagement meetings, practitioner forums and bulletins."

The culture, developed and sustained by the Partnership Director and her team ensures all Supply Chain Partners believe communication is a two-way process where open and honest concerns and ideas can be shared with CDG-WISE Ability, other members of the supply chain and representatives of external quality standards. Supply Chain Partners validated that communication throughout the supply chain network continues to be very proactive and positive.

"We have a on long-standing open, frank relationship with CDG."

"You can never say we didn't get that information."

"You can speak openly and candidly and say what you mean and mean what you say."

"There is a very open policy within CDG, and we can gain advice and support whenever required at all levels."

2b) Developing Supply Chain Partners

It is important to the CDG-WISE Ability team that they support their partner organisations to develop, evolve and maintain and/or improve their sustainability. Supply Chain Partners described how, over the life of the contract, the quarterly site visits undertaken by CDG-WISE Ability had supported the development of their business processes, practices and systems required to deliver the contract and beyond. CDG-WISE Ability believe strongly in their role as facilitators to ensure that Supply Chain Partners capacity to deliver is built and developed.

"They have helped develop footfall for our organisation."

"We have reported a 17% growth since working with CDG-WISE Ability."

"They have helped in our business growth through providing people."

CDG-WISE Ability has supported members of its supply chain to obtain additional funding/finance streams by, for example, acting as a reference for partners' bids and applications.

Champions are appointed from within the supply chain network who have developed specialist knowledge and expertise in a range of areas which they share with their Supply Chain Partner colleagues to help them build their ability and know-how. Partners talked about how:

"We were encouraged to obtain Department for Education funding for Project Navigate which led to the creation of Well-being Through Learning."

"They helped us access Local Authority funding."

"This is discussed on a regular basis, and any information they have is shared openly with the whole supply chain."

The importance of staff development to maintain a quality, robust and value-add service is given high priority by CDG-WISE Ability. Therefore, staff within the Supply Chain Partners have been supported with a wide range of learning and development opportunities since the start of the contract and during the life of the contract - principally through quarterly all-staff training workshops / forums. Also, partners are encouraged to work together to learn from each other with, for example, the shadowing of colleagues from different Supply Chain Partner organisations being standard practice. The effort that the CDG-WISE Ability team take to ensure the workshop / forums are planned and delivered effectively is to be applauded. Supply Chain Partner described how:

"Our staff have been developed with help from CDG."

"We receive regular offers of learning and development and can suggest topics too."

"They helped one of our staff become a tutor."

"They are always offering training."

"The workshops (and other events) are planned well – you never get to sit next to the same person twice so you get to know everyone within the network – and they cater for everyone's needs – excellent."

"Staff have completed many different training courses, and we have specialists Champions in several areas that are shared amongst the supply chain which supports all employees."

2c) Contracting and Funding

The Supply Chain Partners confirmed that CDG-WISE Ability had, at the time of the procurement processes, developed and actioned a commissioning strategy and approach which resulted in the fair and transparent treatment of potential partners. For example:

- Briefing sessions were held during the early stages of the procurement process, to support potential partners resolve any questions/ concerns
- A specialist procurement organisation supported CDG-WISE Ability in reviewing, scoring and shortlisting all Expressions of Interest (EOI)
- An evaluation panel consisting of senior managers from both parent organisations was established
- EOIs were collated and marked using set criteria (as well as group discussion), and
- Both successful and unsuccessful partners received appropriate feedback.

"I wasn't involved but know my line manager would not have signed up if they were not happy."

Supply Chain Partners confirmed that the financial models used by CDG-WISE Ability consider the potential financial risks to all members of the network. Partners commented very positively about the funding arrangements and how they were discussed and agreed between CDG-WISE

Ability and individual members of the supply chain before contract award and have continued to be discussed throughout the life of the contract.

"We had dialogue around financial risk and produced a business continuity plan to address concerns arising from cash-flow issues."

"They did a risk analysis with us"

"This (funding/payment arrangement) is open transparent and discussed when appropriate."

Legally binding agreements were put in place reflecting CDG-WISE Ability's contracting terms and conditions with DWP, mirroring at the time: all relevant Provider Guidance, Ofsted requirements, DWP's Quality Framework, etc. All Supply Chain Partners confirmed they have clear contractual documentation in place, outlining their contractual obligations, payment structures and performance expectations.

"As well as clear contractual documentation we have Service Guides – obligations all very clear."

"As an SSO we have Terms of Engagement."

The allocation of market share is clearly understood by members of the supply chain. Allocation was agreed based on the needs of CDG-WISE Ability and the delivery proposals submitted by individual organisations. All Supply Chain Partners' market share is clearly set within their individual contractual documentation.

"This is very transparent, and reports showing all performance which includes market share is regularly provided."

"CDG coming on board with 10% market share is a good thing they are getting their hands dirty too which sends out a good message and means the market share isn't lost."

The approach of CDG-WISE Ability ensured that Supply Chain Partners proactively and successfully negotiate volumes, funding/finance and performance expectations. Partners took the lead in negotiating resulting in targets for short and sustained job outcomes being established and agreed as per partners' performance offers, as well as other qualitative and contractual compliance requirements. More recently, Supply Chain Partners were extensively consulted on the Year 6 Extension changes and new performance targets were agreed. Every effort was made to ensure that the supply chain was clear on the implications of the changes on cash-flow – for example the change from a 70% 30% funding split to a 50% 50% funding split.

"They were happy to reduce our numbers based on our desire to give quality support."

"This is discussed monthly to ensure it's all still relevant."

The processes used to transfer funds/finances across the supply chain are open, transparent and efficient with accurate and timely payments being made. Supply Chain Partners confirmed that CDG-WISE Ability has established 'risk adverse' systems which mean appropriate funds are transferred within seven days following the claim submission date. All Supply Chain Partner confirmed that *"...there are no problems with payments."*

CDG-WISE Ability's strategy is to minimise the payment of any management fee. All Supply Chain Partners confirmed that throughout the life of the contract they had received excellent support from CDG-WISE Ability and believe that the approach taken by the Partnership Director and her team provides real value for money.

"I get better value from CDG than xxx (Prime Contractor)."
"This is very open and transparent."

3) Conduct

3a) Demonstrating Commercial and Business Integrity

CDG-WISE Ability developed a set of business core principles; referenced on page 1, and subsequently, throughout the establishment of the supply chain, these were communicated to all prospective partners. Alongside these core principles, a code of conduct is in place and together these outline both the ethos of CDG-WISE Ability and the behaviour expected of all persons who work within (and with) them. All Supply Chain Partners fully embrace the core principles and the code of conduct and confirmed that:

"Alignment with principles visited at procurement – we have all put our logos on the document showing we are working together with a common accord."

"They are both fully embedded across the supply chain."

"We like their values and have worked with them for a long time and can see these are genuine."

"Core principles are well established and understood, and there is synergy with CDG-WISE Ability."

A strategy to manage TUPE is in place. However, there has been no requirement to implement this since the formation of the supply chain, and as a result, this aspect of the Standard was not thoroughly tested throughout this assessment. Confirmation was provided that the TUPE strategy would be mobilised, where appropriate, in the future.

As highlighted earlier in this report, one of the key strengths of CDG-WISE Ability is their approach to, and interactions with, all staff within the supply chain which confirmed that they are very well supported, informally and formally, daily and through less frequent structured performance management meetings. Also, staff from across the network described how they are made to feel valued and engaged through for example them being invited to attend the Annual CDG-WISE Ability Success and Celebration event. Comments made by members of the supply chain include:

"CDG are far better than xxx (Prime Contractor) to deal with."

"I received high levels of support when new to the role and needed help with understanding the programme and its requirements."

"There is regular interaction between both organisations staff and it is always clear and supportive. "

"It hasn't changed much. It's a slick operation with no slippage. Same People. Same ethos."

All Supply Chain Partner's reported receiving regular updates via a range of communication channels, including emails, e-Bulletins, workshop / forum meetings, performance and quality reviews and site visits, etc. All of which ensure partner organisations are aware of, and gain timely updates on legislative and regulatory requirements as well as changes to any contractual requirements.

"They always keep us in the loop."

"They are always very proactive in supplying any information necessary about the contract."

3b) Quality Assurance and Compliance

A range of tools are utilised to ensure efficient and proportionate approaches are in place to monitor the quality of delivery and customer experience within the supply chain. The quality cycle includes for example file audits and observation of delivery – both activities ensuring the Supply Chain Partner's programme implementation is compliant with DWP requirements and CDG-WISE Ability standards. Supply Chain Partners are also required to undertake internal file audit on a quarterly basis, the results of which are checked during the CDG-WISE Ability site visit. Following DWP's lead on good practice, CDG – WISE Ability now takes a risk-based approach to quality assuring the supply chain i.e. Low Risk – 6 Monthly, Medium Risk – Quarterly, High Risk – Monthly.

Supply Chain Partner's confirmed that the approach taken to monitoring the quality of delivery and the customer experience is positive and supportive, and has influenced their quality processes and improvements because of staff working closely with CDG-WISE Ability. Partners referred to improvements made to the quality and accuracy of the paperwork, the customer journey and the customer experience, etc.

"This has been changed and adapted over the course of the contract to take on board feedback and improvement, and this shows continual development. It is also discussed and displayed within the documentation provided by CDG."

Throughout the life of the contract, the findings of the quality assurance activities have continued to be shared across the supply chain and used openly and efficiently to improve the services delivered to customers. For example, observations of Advisors undertaken by CDG-WISE Ability and the Supply Chain Partner are now coordinated so as not to overburden the Advisors. The approach taken by CDG-WISE Ability to quality assurance was highlighted as a strength in a recent PAT visit, with the audit team reporting: *"CDG-WISE Ability has improved and strengthened their quality audit regime"*.

"A potential knock-on effect was identified during the quality review meeting, and a common approach using the same paperwork across the network was devised."

"Updates from our QIP feed into the global CDG QIP."

"This is a continuous improvement exercise which is undertaken by ourselves and CDG and is of very high importance as it impacts on the customer experience."

Throughout the quality cycle Advisors are observed and this activity includes the observation of the provision of Information Advice and Guidance (IAG) to customers. The observations provide feedback and support to improve the delivery of the IAG service further. The information shared by CDG-WISE Ability to the members of the network is checked for accuracy etc. by the Partnership Director before circulation.

"This is reviewed on a regular basis through file checks, observations and discussions and training and is incredibly helpful how involved CDG is within this area."

CDG-WISE Ability has utilised the support of a data security expert to design and implement policies and procedures to ensure the security of data and assets. It holds ISO27001 certification and provides staff with appropriate learning and development activities aligned to the requirements of the Standard. Throughout the quarterly quality cycle, data and asset security practices are reviewed, and in the event of a breach in policy or procedure this would be documented in the quality assurance report, and examined within the timescale agreed. Supply Chain Partner's described how the quarterly workshops/forums are used to deliver refresher training and that they are further supported by the Security Champion who was selected from the supply chain and feedbacks to CDG-WISE Ability any questions/queries that the supply chain has.

"This (data security) is discussed and tested on a regular basis."

CDG – WISE Ability and its supply chain continue to ensure that all participants are engaged in healthy and safe Work Choice provision, with due regard to the Health & Safety at Work Act (1974). Each partner continues to maintain their own health and safety policies and procedures which ensure the provision of health and safety training and supervision, appropriate to the customer's stage along their programme journey. All premises are vetted before a customer goes onsite, and this approach was further strengthened in 2015 when the health and safety pre-vet proforma was updated, and an Individual Persons Risk Assessment introduced.

The routine yet robust review and monitoring of partners' safeguarding policies and procedures continue to be undertaken as part of CDG – WISE Ability's contract management and quality monitoring activities. Valid (i.e., in-date) HMG Baseline Security Standard (BPSS) disclosures are in place for all relevant members of staff across the partner network; criminal records checks (as undertaken by the Disclosure & Barring Service) are completed as part of partners' recruitment process. Safeguarding is also a regular agenda item for the quarterly workshops/forums, and the Safeguarding Champion further supports the network.

"Covered under a well-established approach based on physical checks on policies and procedures with updates requested as and where appropriate."

A fully compliant Sustainable Development Plan in place within CDG-WISE Ability, detailing a baseline assessment of the supply chain's current position regarding waste minimisation, recycling levels and energy consumption, as well as on-going estimates of any progress made over time. Some members of the supply chain could provide examples of how they had reduced the usage of paper, etc., however, this remains an area where a more robust approach to discussing, agreeing and monitoring improvement targets with individual members of the supply chain should be considered.

A culture of sharing good/excellent practice began when the contract went live and has continued throughout the life of the contract. This is facilitated through the workshops/forums, as well as quality and performance reviews, e-bulletins, informal sharing of knowledge and information and the annual Success and Celebration events.

"They continually look for continuous improvement and best practice and share this with the partners."

3c) Honouring Commitments

It is now five years since the pre and post contract negotiations took place, however, as reported in 2012 and 2014, Supply Chain Partners confirmed that contract negotiations were transparent and open, and partner expectations managed effectively. More recently, Supply Chain Partners were extensively consulted on the Year 6 Extension changes and new performance targets agreed.

CDG-WISE Ability has a robust dispute resolution process in place, and Supply Chain Partners understand the process, know how to access it and, wholeheartedly believe that CDG-WISE Ability, would be open to challenge through it. Partners once again spoke about the open and honest approach to conducting business and the fact that they would have the confidence to discuss anything with the Partnership Director, including grievances, and firmly believe these would be resolved promptly. At the time of assessment, there had been no formal complaints received from the supply chain.

The Partnership Director and members of the Board of Trustees stated that they would fully respect the decisions made because of the Merlin Mediation Service if it were to be deemed to have not acted by the principles of the Merlin Standard. Partners confirmed that they had been provided with information relating to the Merlin Mediation Service but believe they would never need to use it based on the behaviours displayed and relationships developed across the network.

Communication processes and activities are undertaken to ensure that expectations have been discussed, agreed and are understood by all the supply chain before, during and after contract award. As reported in 2014, Supply Chain Partners continue to be extremely complimentary about the very open, honest and supportive way CDG-WISE Ability approaches the management of the Work Choice contract and supply chain.

3d) Performance

The supply chain was designed with the aim of partners working together, sharing knowledge, information and good practice to deliver a high-quality service that achieves the aims and objectives of the Commissioner. These aims have been met throughout the life of the contract and is a major strength of the CDG-WISE Ability teams approach to supply chain management. Partners described how excellent collaborative working takes place at a local level with partners meeting each other regularly and, through careful facilitation by CDG-WISE Ability, discuss how they can support each other to meet customer needs.

"We are one team – it's as simple as that."

"CDG has facilitated team and collaborative working from day one."

"This is one of the key elements to the success of the contract in how well the whole supply chain work well together and as one organisation."

All Supply Chain Partners reported that monthly performance review meetings with the Partnership Director have been maintained and that they continue to add value. All aspects of supply chain performance are formally managed through these meetings. Supply Chain Partner performance to profile is reviewed and reconciled daily by the CDG-WISE Ability team, and this is

underpinned by the weekly submission of forecast and actual performance Management Information (MI) templates by Supply Chain Partners.

Performance expectations are clear, well defined and understood by Supply Chain Partners. The very open, honest and frequent discussions between partners and CDG-WISE Ability are very effective in quickly identifying differences in the anticipated performance outcomes against clearly set and communicated targets. To demonstrate openness and transparency, CDG-WISE Ability formally reports to the Board of Trustees on a bi-monthly basis with a fully detailed report.

"There are high-quality monthly meetings with a full agenda."

"I have monthly contract reviews with CDG as well as receiving regular updates on performance."

"As a Board we are very aware of how the contract is being delivered." – Board Member

The framework, strategies, communications and actions of CDG-WISE Ability continues to ensure Supply Chain Partners understand the performance required of them – as individual organisations and as a network - further demonstrating the commitment to working towards a common goal. In addition, monitoring of DWP "soft" key performance indicators is clearly understood.

"It is nice to see how others are performing."

CDG-WISE Ability continues to use the simple and streamlined processes introduced at the commencement of programme delivery to collect, measure and analyse MI. All Supply Chain Partners believe the system works effectively and provides them with the information they need in a simple, straightforward way without a burdensome administrative requirement. Partners commented:

"There is a very clear and transparent process in sharing data and performance on a regular basis so it is clear if there is any underperformance."

"The MI system can generate information on distance travelled by clients."

"It works – it's simple but effective."

There is a belief that value for money is provided across the contract as the funds are aimed at the service delivery with minimum funds being spent on overheads. This approach contributes directly to the customer's achievements, both regarding the soft outcomes as well as progressing to the overarching aim of achieving sustainable employment. Supply Chain Partner described how:

"It is not just about delivering as per contractual performance requirements – we go beyond this and give real value for money."

"It is also about support and quality and as such is actually added-value and not value for money."

"Value for money is more about giving the client the most appropriate high quality support, guidance and time and not chasing a quick sustain payment."

Well established and embedded processes are used across the supply chain which encourage and measure demonstrable outcomes. For example, customer documentation has been specifically designed to capture distance travelled with Employment Development Plans recording distance travelled against a range of "soft" outcomes and customer forums help report distance travelled through real-life customer relaying their experiences. Good news stories are collected and shared across the supply chain and in addition, reference was made to the feedback gained from customers, which indicates the impact the programme has had on them. This is shared with the partners and celebrated at the annual Success and Celebration event.

3e) Promoting Diversity and Equality

Diversity and equality are embedded within the core principles of CDG-WISE Ability and its network of Supply Chain Partners. The arrangements of each partner were examined during the pre-contract due diligence checks and following contract-award CDG – WISE Ability compiled and implemented an Equality & Diversity Delivery Plan which has been shared with partners. Access to Work funding is actively promoted, and the network is supported by a Champion with expert knowledge of this area.

"Our policies are all fully aligned with CGD ethos."

Supply Chain Partners are required to maintain their own Equality & Diversity policies and procedures, which are reviewed and monitored by CDG-WISE Ability. The regular review and monitoring of these policies and procedures (as well as any Equality & Diversity issues or concerns themselves) continues to be undertaken as part of CDG-WISE Ability's contract management, site visits and equality of opportunity monitoring activities.

Equality & Diversity MI continues to be collected for all customers who voluntarily share such information. This data is analysed on an annual basis to ensure parity of outcomes across all customer groups. Referral routes onto the programme are limited which means that directly influencing the referral types is limited. Consequently, there are no strategic targets to increase the numbers of individual customers not engaged in the programme. However, over the life of the contract, CDG – WISE Ability has continued to establish relationships with new Statutory Referral Organisations (SROs) to engage potential customers who are not typically involved with JobCentre Plus services.

"We have an equality and diversity Champion for the whole supply chain who provides training and information to our quarterly meetings."

4. Review

4a) Supply Chain Review

A robust range of activities are used to gain feedback from different stakeholders including customers, partners, commissioners, etc., For example:

- Customers are encouraged to informally discuss their views as part of their quarterly review meetings with their Adviser. They are also given a copy of CDG-WISE Ability's Customer Feedback Form, which supports them to formally (and if a they feel necessary, anonymously) raise a compliment or complaint
- CDG – WISE Ability continues to carry out an annual formal stakeholder satisfaction survey. The latest being conducted between April and June 2016. In total, 485 surveys were sent, with 139 surveys (29%) completed and returned; 70 surveys were also sent to customers' employers
- Further customer and employer feedback was gathered through inviting them to attend this year's self-assessment activity. Invites were also issued to JobCentre Plus Advisers and DWP, and
- Feedback was also sought in August 2016 from all staff in the supply chain, with 31 invites sent with 19 surveys being completed.

CDG-WISE Ability also seeks feedback through external audits, for example, following a PAT inspection in April 2016, the supply chain was awarded the highest assurance rating by DWP for the 2nd consecutive time.

"JCP participate strongly as a stakeholder and have helped produce above average referral volumes for CDG-WISE Ability."

"There are many ways of gaining feedback including but not limited to customer forums, surveys, observation feedback, good news stories, social impact forms, processes and procedures, staff surveys, JCP surveys, quarterly review comments."

CDG-WISE Ability and its supply chain recognise that continuous self-assessment is a fundamental condition of its contract with DWP. More importantly, however, they also recognise its importance in driving continuous improvement forward. The DWP's Self-Assessment Tool, the four Principles of the Merlin Standard, and statements from the Ofsted Common Inspection Framework are used as the basis of the self-assessment. All interviewees spoke highly of the interactive one-day workshop held to complete the Self-Assessment during which the view of operational management, delivery staff working within the supply chain, customers, employers, Advisers and Administrators were sought This approach further fosters the high levels of transparency, honesty and collaboration across the partner network and with key stakeholders.

"The self-assessment day was bril."

"There were open frank discussions at the self-assessment workshop."

"The whole supply chain worked on the SAR it was not done to us."

Throughout the life of the contract CDG-WISE Ability has continued to keep its Supply Chain Partners informed of the wider policy and strategy information, usually via the Supply Chain Steering Group meetings, and where appropriate DWP policy is disseminated to staff across the network via workshops/forums and via the e-Bulletin. Supply Chain Partners also highlighted how the Partnership Director diarises update sessions with the network based on when she receives updates from DWP so that a timely update is provided. Interviewees from the supply chain and CDG-WISE Ability were more than able to identify how the support they are providing to customers is strategically aligned with the wider social objectives and how these are promoted effectively through good news stories and the annual Success and Celebration event.

"This is shared in an open and transparent way when appropriate."

"They always keep us in the loop."

Following the Merlin assessment in 2014, CDG-WISE Ability has made improvements to how they measure the Social Value impact of Work Choice on their customers. A task force was formed to discuss appropriate ways Social Value could be measured and in October 2015 a new Social Value form was issued. These are completed by Supply Chain Partners and then collated and evaluated on an annual basis by CDG-WISE Ability. Through for example, publications such as the annual report and individual case studies, the Success and Celebration event and supporting employers through Disability Confident, CDG-WISE Ability promote very effectively the measurable impact the supply chain has on the wider social objectives of the commissioner and stakeholders. All those interviewed highlighted how effective the Success and Celebration events were at 'brining to life' the positive impact the work of the supply chain has on the lives of customers – over and above the specific outcome requirements of the programme.

Case studies and good news stories collected and shared by CDG-WISE Ability demonstrates how, customers, external stakeholders including employers have, through the work of the supply chain, been encouraged to develop themselves and their wellbeing in the widest possible sense.

"I like the information they provide on social impact."

CDG-WISE Ability has continued to ensure that the supply chain is relevant to the changing needs of the customer group. Until October 2015 there had been no evidence of gaps in the Work Choice supply chain and therefore no requirement to introduce new partners - other than to refresh the SSO Register. However, as highlighted within Element 1 of this report, the exiting of a National Charity from the Work Choice supply chain saw CDG-WISE Ability embark on a strategic review of their supply chain delivery capability, aligned to the remaining contract timelines and requirements, resulting in the decision to embark on direct delivery rather than share the remaining 10% market share amongst the existing Supply Chain Partner or embark on procuring a new member to the network.

6. Conclusion

CDG-WISE Ability has met the requirements of the Merlin Standard to an excellent level.

The working relationships at all levels across the supply chain are strong and operate within the spirit of true partnership. Supply Chain Partner and the CDG-WISE Ability team all talked about 'teamwork' and 'being one team' and the importance of working together for the benefit of the customer.

Going forward, the challenge for the Partnership Director and her team will be to replicate the culture of openness and trust underpinned by the desire and determination to achieve, which they have created and embedded within this supplier network, within a larger more diverse supply chain.

In December 2018 CDG-WISE Ability will be expected to be re-accredited with the Merlin Standard, if it is a Prime Contractor for DWP or any other commissioner/funder mandating organisations to achieve the Standard. In the meantime, in the event of any changes to the make-up of CDG-WISE Ability, or a substantial contract being awarded it may be deemed necessary to undertake a strategic review, or a full assessment to ensure the organisation continues to behave in line with the principles of the Standard.

Assessment Type	REVIEW ASSESSMENT
Assessor's Decision	STANDARD MET
Lead Assessor's Name	RUTH REGAN
Visit Date	5/12/2016 to 6/12/2016
Client ID	C20263
Assessment Reference	N/A