



merlin standard

2018

PLUSS ORGANISATION CIC

COMPACT REPORT

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1. KEY INFORMATION

Assessment Type	ACCREDITATION REVIEW
Assessor's Decision	STANDARD MET
Anniversary Date	15/03/2020
Assessment Dates	12/03/2018 – 15/03/2018
Lead Assessor's Name	LORNA BAINBRIDGE
Customer ID	C13958
Assessment Reference	PN103381

2. ASSESSMENT OUTCOME

OVERALL OUTCOME	77% Good
1. Design	87% Excellent
2. Procure	90% Excellent
3. Contract	80% Good
4. Fund	80% Good
5. Develop	80% Good
6. Performance Manage	69% Satisfactory
7. Quality Assurance and Compliance	60% Satisfactory
8. Review and Close	68% Satisfactory

3. METHODOLOGY

Pluss Organisation CIC continues to be mandated by Department for Work and Pensions (DWP) to be accredited against the Merlin Standard due to being a delivery Partner (Prime) for the Work Choice Programme, ESF1420 and the more recent Work and Health Programme. Primes are required to be re-accredited every two-years and consequently the organisation came forward for re-accreditation in line with the anniversary date.

The assessment team comprised of Lorna Bainbridge (Lead Assessor) and Andy Richardson (Team Assessor) supported by a coordinator from within Pluss Organisation CIC. The Lead Assessor started to work with the coordinator in December 2017 to establish the scope and discuss the logistics of the assessment. The dates for the on-site were identified and a plan of action agreed.

A booking form was submitted to Assessment Services Limited along with a spread-sheet indicating a full list of Partners; past, present and potential delivering an end-to-end service, specialist or ad-hoc service.

In advance of the Assessment a survey was carried out of the Supply Chain Partners (referred to as Partners throughout the report), all 211 were invited to participate. Responses were received from 44 present Partners, two past and eight potential Partners. The results of the survey informed the focus of interviews for the assessment team and contributed to the overall scoring.

The Lead Assessor was in regular contact with the coordinator prior to the on-site activity to review the schedule and logistics. All documentation required for the assessment; Self-Assessment Questionnaire (SAQ), Pre-Assessment Notes (PAN) and schedule were shared to enable the assessment to take place as planned.

The assessment team spent a total of three days each reviewing documentary evidence and undertaking interviews with Pluss Organisation CIC staff involved in the strategic and day-to-day management of the supply chains. 16% of the Partners were interviewed. Whilst consideration was made to all Partners; end-to-end, specialist and ad-hoc, as well as present, past and potential across all contracts, it should be noted that 57% of the end-to-end Partners were interviewed.

The following compact report provides an overview of the findings against key criteria within the Merlin Standard, areas of strength and areas to consider for development over the forthcoming two-years.

4. ABOUT THE ORGANISATION

Pluss Organisation CIC (referred to as Pluss throughout the report); a Community Interest Company supports over 5000 people to move towards employment each year. It provides services to customers furthest away from the labour market and offers specialist employment support to individuals with a range of learning disabilities, mental health issues, physical disabilities and long-term health conditions.

The vision is *'to inspire people of all abilities to achieve a career'*, which is underpinned by a set of core values. The core values include; *'success through empowerment'*, *'strong and secure'*, *'customer focused'*, *'equality and fairness'* and *'working in partnership'*.

It has a proven track record spanning over forty-five years, delivering a range of national and locally procured employment programmes on behalf of DWP, European Social Funding (ESF), Big Lottery, Local Authorities (LAs), etc.

Pluss operates with physical locations throughout South West England and West Yorkshire and at the time of the re-accreditation assessment was a Prime provider for the Work Choice Programme and Work and Health Programme both funded by DWP, Building Better Opportunities (BBO) funded by Big Lottery and European Social Funding (ESF) and the Right Steps to Work ESF1420 (DWP). It was also operating as a Supply Chain Partner to other Prime contractors in Somerset and the West of England.

Pluss has recognised the importance of working with others to achieve a common goal and since being successful as a Prime for the Work Choice Programme has consistently developed a supply chain to support the delivery of the services. Expertise and local knowledge has been valued and the development of partnership working has been the basis of Pluss' success in terms of performance. At the time of the re-accreditation assessment the following indicates the split between direct delivery and that of a supply chain:

Work Choice - Devon & Cornwall; 100% direct delivery

Work Choice - West Yorkshire; 60% direct delivery, 40% supply chain

Right Steps to Work - Calderdale, Kirklees & Wakefield; 23% direct delivery; 77% supply chain

BBO - Cornwall Coast to Coast; 100% supply chain

BBO - South & East Cornwall; 100% supply chain

BBO - Devon; 25% direct delivery, 75% supply chain

BBO - Somerset; 30% direct delivery, 70% supply chain

BBO - Calderdale, Kirklees & Wakefield; 100% supply chain

Work and Health Programme - Southern; 39% direct deliver, 61% supply chain.

Since the assessment in 2016 the number of Partners that Pluss work with has increased due to their success with BBO and Work and Health Programme, which has brought about challenges. It has opted to partner with a number of voluntary, charitable and community-based organisations, which tend to be less familiar with a formal approach to supply chain management than the public and private sectors. In addition, it has engaged with numerous tier 3 (specialist) and tier 4 (ad-hoc) providers to support BBO and Work and Health Programme; and once again a number of these are less mature partners and unfamiliar with formal systems and processes.

5. AREAS OF SIGNIFICANT STRENGTH

A number of significant strengths were identified during the Assessment and these are described below. The numbers in brackets refer to the criteria of the Standard:

Pluss has taken into consideration, and subsequently engaged with organisations from the different sectors including; public, private and third sector, which include charitable, social enterprise and community interest company. Organisations included those of a corporate nature, small and medium enterprises as well as sole traders. Work continues to be undertaken to identify Partners to enter the Intervention Framework, which comprises of tier 3 speciality and tier 4 ad-hoc providers to address the needs of customers. Partners confirmed that there was a good mix within the respective supply chain, which encouraged healthy competition and opportunities to work together. (1.1, 1.6)

The use of wider networks beyond the formal supply chain has been actively sought by Pluss in order to deliver comprehensive support services to stakeholders, customers and partners. Pluss' senior leaders and managers are represented at national, regional and local events, for example those hosted by Employment Related Services Association (ERSA), Local Enterprise Partnerships (LEPs), Local Authorities, JobCentre Plus (JCP), NHS Trusts and key Clinical Commissioning Group (CCGs). The use of Expert Panels and the employment of a Community Engagement Team contribute to addressing gaps in the provision of the service and identify other agencies and organisations to engage and support delivery, for example, housing associations and mental health support groups and a wide range of community groups, for example, faith, Black Asian and Minority Ethnic (BAME), Lesbian, Gay, Bisexual and Transgender (LGBT), neighbourhood, young people etc. (1.2)

Throughout the bidding process for Work and Health Programme and BBO Pluss hosted a range of meetings to engage potential Partners to have an input into designing the delivery model by using their expertise and previous experience, as well as knowledge of the local area. Subsequently a number of Partners confirmed that Pluss listened to their views and opinions, which was reflected in the approach adopted. In addition, the Expert Panels have been set up to support the design and development of the supply chains, which has helped to shape systems and processes. Throughout the life of the contract Partners are consulted on a range of developments, for example, the CMS (management information system adopted by Pluss), health and safety risk assessment for work placements, etc. (1.3)

A robust strategy to address Transfer of Undertakings (Protection of Employment) (TUPE), for those employees transferring in or out of Pluss has been designed. The aim is to work in partnership with the other organisation ensuring a positive experience for the employee at a time that can often be stressful. Pluss has successfully implemented the TUPE strategy on a number of occasions, which was confirmed by staff. Staff who had transferred into Pluss made reference to regular communications throughout the process, the opportunity to seek clarification and most importantly made to feel part of the team straight-away. (2.2)

Over the two years leading up to go-live for the Work and Health Programme regular partner co-production meetings were hosted whereby a range of discussions were undertaken including the allocation of the market share. Partners confirmed that the conversations were open and subsequently they agreed the market share amongst themselves, which resulted in the Partners clearly understanding the rationale for the decision. Within a CPA for BBO Partners spoke of having an equal share whilst Partners delivering Right Steps to Work explained that the share allocation was agreed "*more by way of negotiation*". (2.3)

Whilst a number of the contracts have a structured approach to funding and payment arrangements, for example, Payment by Results, Pluss make every effort to ensure the Partner does not experience undue financial risk. As a result, some Partners have gained one-off payments and payment within 14days as opposed to 30days. In the case of BBO the service fees are paid in advance based on cost estimates developed by Partners, which are supported by Pluss. (4.1)

The Operations Manual is updated regularly, which informs Partners of who to approach in various situations, raise queries or simply require general help and support. Partners confirmed that they had a 'specific person of contact' to support with day-to-day issues and challenges and monthly contract reviews. In addition, key named personnel were made known to them to support with quality, compliance, finance, etc. In all cases, Pluss' staff are accessible and available as well as being responsive and supportive. Some Partner comments included: "*I think we're clear on the relationships we have at the various levels within Pluss.*" "*We also have direct communications to and from the CEO and COO on a weekly or fortnightly basis.*" "*It's like a partnership.*" (6.1)

6. AREAS FOR DEVELOPMENT

A number of areas where further development would be beneficial were identified during the Assessment. These are for the Organisation to consider as a contribution to continuous improvement. The numbers in brackets refer to the criteria of the Standard:

Pluss' values are recognised as the guiding principles for partnership working within each supply chain and Partners confirmed that their values were aligned to them. The values are shared with Partners through a range of presentations, however, as a number of Partners inferred "*they are no different to a number of other organisations' values*". One of the BBO supply chains had reviewed the values and contextualised them to ensure all Partners understood the behaviours expected when working together, and as a result Partners were better able to articulate, the values and what this meant in practice. In the future, consideration could be made to adopting a similar approach across all supply chains to ensure the values are embedded and govern the way the supply chain operates. (1.5)

Those Partners delivering Work Choice and Work and Health Programme are aware that a management fee is paid, and understand the support gained in order to deliver the contract effectively, for example, performance management, quality assurance, management information, learning and development, etc. In the future, consideration could be made to using a sliding scale and / or a menu of options for the management fee, which starts higher at the start of a contract and reduces over time based on the level of support provided, if appropriate. (4.3)

Pluss provides support to the end-to-end Partners in terms of an implementation plan for the contract set-up, access to policies and procedures, as well as learning and development activities been provided throughout the life of the contract. In addition, extensive support is provided to Partners to capacity build and ensure they are financially stable and sustainable businesses. There was evidence of support been provided to tier 3 and 4 Partners in terms of developing their service offer and outlining minimum requirements to be compliant in health and safety, safeguarding, data security, etc. In the future, consideration could be made to providing a higher level of support to tier 3 and 4 Partners through business health checks, additional capacity building and learning and development activities to further demonstrate Pluss' commitment to partnership working and building sustainable organisations. (5.1, 5.2, 5.3)

Communication approaches have been designed and implemented across the supply chains, however, feedback from Partners varied in terms of the effectiveness. The direct interaction (verbal) between staff and Partner was effective and Partners confirmed that individuals were approachable and responsive, however, communications by email tended to be less timely, haphazard and often lacked clarity. Consideration could be made to reviewing the approach including the frequency of emails, timeliness and clarity of the message, for example, confirming acceptance on to the Intervention Framework, commissioner guidance changes through to raising awareness of changes to legislative and regulatory requirements for end-to-end Partners, as well as tiers 3 and 4. (6.2, 7.1)

The performance management practices of the end-to-end Partners delivering Work Choice and the BBO programmes are embedded and support them to address issues and concerns and provide the opportunity to share ideas including different approaches to delivering the service. The performance management interactions for the Work and Health Programme are in the early stages of implementation. In the future, consideration could be made to performance managing the tier 3 and 4 Partners to ensure they continue to deliver the services in line with the aims and objectives and formally review the quality of service through customer feedback. (6.3)

The CMS has had different iterations to meet the needs of the contracts and expectations of Partners, however, Partners continue to feel that access to appropriate, current and accurate management information could be improved. The assessment team were made aware of the current review and planned development for the CMS, which included feedback from Partners, whereby improvements were to be identified. As a result, Pluss is encouraged to continue with the review in order to provide all Partners with access to current and accurate management information, including that relating to equality and diversity to enable them to drive performance more effectively at Partner and supply chain levels. (6.4, 8.4)

Currently, tier 3 and 4 Partners do not have access to the CMS, however, in the future consideration could be made to providing them with a limited access to be able to view others' service offers. This may contribute to building capacity and collaborative working across the supply chains. (6.4, 1.4, 5.2)

A robust approach has been adopted to compliance through a range of audits / file checks at the start of and throughout the life of a contract to ensure the commissioner's requirements are met. Whilst the quality of service is reviewed through customer feedback mechanisms there has been less focus on analysing the data to inform improvements. Similarly, whilst a strategy to observe the practice of delivery staff has been designed and includes teaching, learning, information, advice and guidance this is yet to be implemented. Pluss are encouraged to implement the plans and also consider an approach to be made to quality assuring the service provided to customers by the tiers 3 and 4. (7.2, 7.3)

Partners were able to provide anecdotal evidence of the impact on the wider social objectives of the commissioners, as well as the positive impact on the customer groups and staff, for example in the case of customers, distance travelled was being measured which indicated improvements in confidence and self-worth, health and wellbeing, etc. Whilst Pluss have invested in an external organisation to undertake a level of evaluation to establish the positive impact on the different stakeholders and communities this failed to be completed in preparation for the Merlin assessment. In the future, consideration could be made to using the Expert Partners far more effectively, and drawing upon their knowledge in terms of reducing crime rate, homelessness, improvements to customer's mental and physical health, etc. (8.2, 8.3)

7. AREAS REQUIRING SIGNIFICANT IMPROVEMENT

The following areas were identified as needing improvement as there was limited or insufficient evidence was found during the assessment (a score of less than 3). The numbers in brackets refer to the criteria of the Standard:

Partners within the Work Choice supply chain referenced the completion of a Self-Assessment Report (SAR), which was resultant in a Quality Improvement Plan (QIP) for their provision of the contract. Others cited their monthly performance reviews and felt that comments made throughout these interventions fed in to the SAR process, but once again, Partners were unsure as to exactly how, and were able to provide any examples. The process was imminent for the BBO programme and plans were in place to undertake an annual SAR for the Work and Health Programme, which would include feedback from a broad range of stakeholders, including customers, Partners, employers, etc. and this will contribute to Pluss' Business Improvement Plan (BIP). Consequently, Pluss is encouraged to implement their plans to undertake an inclusive approach to an annual self-assessment and develop the BIP, which is subsequently shared with Partners to enable them to recognise the required improvements to quality and performance across the supply chain. (6.7)

8. FINDINGS

The feedback below is reported against key criteria of the Merlin Standard, aligned with the “Plan-Do-Review” business cycle.

PLAN
<p>Through planning an effective supply chain, the range of partners and how they are engaged ensures there is a group of organisations that cover a diverse range of providers that all understand the requirements of the contract and their contributions to achieving the desired outcomes.</p>
<p>Pluss has really embraced working in partnership with organisations from different sectors and of varying sizes to provide end-to-end, specialist and ad hoc services to ensure the commissioner’s objectives and contractual requirements are met. The Intervention Framework truly represents the different sectors and sizes to address the current and changing needs of the customers. Partners recognised what others brought to the supply chain and confirmed there was a good mix of providers to meet the needs of customers.</p> <p>Some comments from Partners included:</p> <p><i>“We were invited, several times to attend meetings with potential partners – there seemed to be a fair mix of organisations represented. This helps to build for an inclusive range of customers. They’re not afraid to go for challenging sectors.”</i></p> <p><i>“The Intervention Partner Framework is evolving over time – this helps to keep all local provision on the radar screen.”</i></p> <p>The make-up of the supply chains is reviewed and subsequently continue to evolve to meet the changing needs of customers and address the requirements of the commissioners. The Intervention Framework provides testimony to this fact as potential Partners (identified through a range of activities) are encouraged to complete the Expression of Interest (EoI) and if successful, are provided with opportunities to build capacity.</p> <p>In the event of an end-to-end Partner leaving the supply chain prior to the end of the contract, there was evidence of the other Partners having been involved in reviewing the design and contributing to the decision relating to the reallocation of the market share and volumes. This has resulted in Partners gaining additional market share and volumes, increasing the delivery of direct delivery or introducing a new Partner.</p> <p>Some Pluss staff comments included:</p> <p><i>“Clearly, we’ve had some Partners drop by the wayside and we’ve had others come on board to fill the gaps. We’ve also introduced specialists, for example those who deal with ex-offenders into both our supply chain and our Panels to be able to better serve that group.”</i></p> <p><i>“We had a Partner on Work Choice who struggled to get the participation needed, so we agreed to transfer their provision to (name). We also have regular movers and shakers on the Framework for BBO.”</i></p>

Partners confirmed that the process for completing the Eol and if appropriate, due diligence was robust but straight-forward. In addition, reference was made to effective communications throughout the duration of these activities. Equally, specialist and ad-hoc Partners confirmed that 'procurement was simple' and that it was a fair and transparent process.

Some Partner comments included:

"We learned of the contracting opportunities with Pluss through the Carley website and ERSA website, as well as other public 'noticeboards'. Communications were clear throughout the procurement process with regular (weekly) updates on the progress with the bid all the way up to contract award."

"We signed a commitment to implement the minimum standards for health and safety, data security and safeguarding, which as a small organization simplified the process and saved us time."

"Bang on with what we expected."

Partners clearly understood the aims and objectives, and outputs of the contract prior to completing the Eol. Targets and outputs were openly discussed at length during the co-production meetings prior to contract live, which were subsequently included in the contract and continue to be referenced throughout the regular dialogue; informal and formal. Partners clearly understood what was expected in terms of performance expectations and felt they were achievable as this had been openly discussed and agreed.

Similarly, in the event of changes to the targets and outputs these are discussed and agreed and reflected in an appropriate variation of contract.

Some Partner comments included:

"Expectations are built in to the Eols, contracts and compliance agreements, so it's all quite clear."

"We read through our contract and the other paperwork we got sent and we could see the expectations Pluss has of us clearly."

Due to a number of the contracts being 'payment by results' Pluss undertake extensive financial due diligence to ensure a potential Partner is not put at financial risk this is done through finance modelling and ensuring that the organisation is not solely reliant on one contract / income stream. There was evidence of some Partners being provided with one-off payments to support cash flow and making a payment in 14days as opposed to the 30days.

Partners delivering the BBO contract explained the service fee and how the payments were made and reconciled, which ensured they were not at financial risk. In addition, Partners accepted onto the Intervention Framework confirmed that they had indicated the unit price for the delivery of service, which was to be reviewed with Pluss.

Some Partner comments included:

"We had a thorough financial risk assessment done at the very start by Pluss to make sure we weren't over-stretching ourselves."

"All thoroughly discussed during the co-production meetings – really transparent."

"We did our own financial risk assessment and Pluss also did a risk assessment to make sure we were going to be okay with the contract."

"We put our fee rate into the EoI and we got accepted onto the Partner Framework, so I guess they're happy with it."

DO

Supply chain partners are supported to develop their services to meet or exceed expected performance and quality assurance requirements.

Pluss provide support to Partners to design policies and procedures to address legislative and regulatory requirement to meet the needs of the commissioner. In addition, extensive support is provided prior to the contract going live to ensure delivery staff have an understanding of the paperwork requirements, systems and processes, including reporting, where appropriate.

Over the last two years Pluss have invested in financial co-ordinators / offices to provide additional advice and guidance to Partners in relation to finances, and more recently IT specialists to develop the CMS and provide additional support to Partners.

There was an example whereby Pluss' Chief Executive Officer and other senior staff had been appointed to the board of a Partner organisation to improve governance and financial management capabilities of the organisation.

Some Partner comments included:

"In addition to the CMS training Pluss provided, they also sent over a member of their staff to help us get to grips more with the system; that was really useful."

"We're confident we have the experience and know what we're doing, so no real need for any more support. I'm happy it would be there should we need it though. That said, they did help us out when my computer went down, and I lost some key documents, they helped me to recreate them quickly and effectively."

"X, Y and Z are always going over and above on things – they got us an additional Change Coach allocated when our numbers rose, and they champion our cause if we have a claims dispute."

"Real support throughout the contract to ensure we're successful."

Communication approaches have been designed and implemented and a number of Partners confirmed that the verbal interactions were consistently open, honest and without unreasonable constraint. They were confident to discuss issues and challenges regarding the contract and seek additional support, advice and guidance to identify appropriate resolutions.

Some Partner comments included:

"I've found them (Pluss) to be massively supportive in their communications. We have fortnightly tele-kits with other partners and almost daily contact from Pluss themselves. We also get a weekly performance review to make sure everything is on track."

"This is definitely one of their strong points, they're the most open and communicative organisations I've worked with – they help you to feel trusted and valued."

"Feel part of the team, open and frank discussion and then we can move on."

"Nothing formal, but communication is good" (tier 4 ad-hoc provider)

Performance management practices have been designed and implemented to monitor and support Partners to deliver the service and meet the targets, aims and objectives. This is embedded within Work Choice and the BBO programmes, and Partners confirmed the effectiveness and support gained from Pluss to meet performance expectations.

Some Partner comments included:

"The Supply Chain Manager reviews things two-weekly and we also have monthly formal performance reviews. The tele-kits also provide for us to review our performance and measure against other Partners."

"CMS monitors performance in real time and we have 6-weekly reviews with our Partnership Manager. Pluss are keen to support innovation and help Partners to share, though some are better at this than others, for example, we shared our approach to monitoring referrals with (partner name) as this was something they struggled with."

The CMS was designed to provide effective reporting against key requirements of each contract to provide management information to Pluss and Partners. This has had different iterations and changes over the past two-years and continues to evolve. Partner's comments varied regarding the reports and management information. A number were aware that Pluss are investing further to improve the information provided to help drive performance.

Partners confirmed that they were briefed regarding the requirements of compliance and quality of service delivery, including the different activities to support them to meet the contractual requirements. A number of Partners made reference to The Bureau, another investment made by Pluss, which supports compliance activities on a day-to-day basis and is a resource for information and advice. Pluss also supports Partners by providing additional training and one-to-one coaching to ensure a clear understanding of the expectations. The findings of compliance and quality of service activities are reported to Partners, whereby they are expected to take appropriate action, which is subsequently followed up by Pluss within a realistic timescale.

Some Partner comments included:

"We have the Observation Framework for WHP and the Performance Review Stencils."

"In the early stages, the quality audits found that we weren't really using the CMS as well as we could or should be. The audit they did showed us exactly where we needed to improve to be fully compliant. That will also help us to manage our own delivery better in the future."

"We are also required to share with Pluss our own approach to auditing our quality and we let them see our observations schedules and file audit plans."

REVIEW

Review and evaluation is used to demonstrate the impact of the services delivered and continuously improve service delivery.

Pluss have invested in an external organisation to undertake a level of evaluation to establish the impact on the wider social objectives, and on the different stakeholders and communities. In addition, the Panel Experts are a useful resource to establish the impact of different programmes. Partners were able to provide anecdotal evidence of the impact on the wider social objectives of the commissioners as well as the impact on customers, external stakeholders and wider community. One Partner explained the impact on customers, external stakeholders and the wider Working with Plymouth Council Inclusive Growth Board with an estimate that by taking 1000 people off ESA, there will be saving of £30million.

Some Partner comments included:

"The impact is clearly on employability for us, though other impacts are defined in the performance measures."

"We had one situation where a group of homeless people were living in a car park. We worked with them and social services and got over half of them on our programme and into accommodation as a result."

"We also help small, independent providers remain viable by giving them business and often they then have an impact on some of the wider social aspects like poverty and mental health."

"We do loads of miles in a car, so to off-set the carbon emissions we have set a target of 500 trees to plant throughout the life of the contract. We've planted 250 to date."

"Staff have really enjoyed the contract (Work Choice) they've learnt new skills and have stayed with the organisation for the duration of the contract."

In conclusion, this assessment provided the opportunity to review the practices of Pluss for the current contracts against the Merlin Standard. The senior leadership team should be mindful that any significant organisational or senior staff changes, and / or being awarded additional contracts using a significantly different supply chain may require a strategic review. Similarly, any decisions reached by the Merlin Mediation Service / Independent Complaints Examiner may also result in a strategic review being required to ensure the organisation continues to operate in line with the Merlin principles.

9. CONDITIONS OF ACCREDITATION

Holders of the Merlin Standard Accreditation must:

- Maintain and continually improve upon their approach to Supply Chain Management.
- Cooperate with annual Reviews as required by Assessment Services Ltd
- Inform Assessment Services Ltd (merlin@assessmentsservices.com) or their Lead Assessor if the key contact name or contact details change.
- Inform Assessment Services Ltd of any significant changes made to the organisational structure, senior management or systems that may impact on their accreditation; email:
- Inform Assessment Services Ltd immediately if they gain additional contracts.
- Inform Assessment Services Ltd of any serious complaint or rise in numbers of complaints received from Supply Chain Partners.
- Not undertake or omit to undertake any activity that may be misleading and/or may cause Assessment Services Ltd and/or the Merlin Standard to be brought into disrepute.
- Only use the Merlin Standard Quality Mark for the areas within the scope of the accreditation and in accordance with the guidelines.
- Ensure in cases where accreditation is withdrawn or where they do not come forward for Accreditation Review, remove from display any certificates or plaques issued by Assessment Services Ltd and do not display the Merlin Standard Quality Mark, nor refer to being a former holder of the Merlin Standard.
- Be aware that Assessment Services Ltd reserves the right to remove any accreditation and/or certification previously applied if payment is not received for services provided.
- Submit their Booking Form for re-accreditation to the Merlin Standard at least 4 months prior to the accreditation anniversary date ensuring all pre-on-site activity is completed in a timely way including planning, payment, completion of the Self-Assessment Questionnaire (SAQ), Pre-Assessment Notes (PAN) and interview scheduling. Accreditation Reviews are due 2 years from the anniversary accreditation date; it is expected that organisations will be assessed by this date or will risk being de-accredited.

	
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