



merlin standard

2018

REED IN PARTNERSHIP

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1. KEY INFORMATION

Assessment Type	ACCREDITATION REVIEW
Assessor's Decision	STANDARD MET
Anniversary Date	04/07/2020
Assessment Dates	02/07/2018 – 04/07/2018
Lead Assessor's Name	LORNA BAINBRIDGE
Customer ID	C15968
Assessment Reference	PN103390

2. ASSESSMENT OUTCOME

OVERALL OUTCOME	90% Excellent
1. Design	97% Excellent
2. Procure	95% Excellent
3. Contract	100% Excellent
4. Fund	87% Excellent
5. Develop	87% Excellent
6. Performance Manage	86% Excellent
7. Quality Assurance and Compliance	84% Good
8. Review and Close	88% Excellent

3. METHODOLOGY

Reed in Partnership (referred to as Reed or the Organisation throughout the report) 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 a number of contracts (listed below) funded by the department. Organisations are required to be re-accredited every two-years, and consequently, Reed came forward for re-accreditation in line with the anniversary date.

The assessment team comprised of Lorna Bainbridge (Lead Assessor), Susan Smith (Team Assessor) supported by a coordinator from within Reed. The Lead Assessor started to work with the coordinator in February 2018 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 Supply Chain Partners (referred to as Partners throughout the report) delivering a range of services funded by different commissioners, for example, DWP, Department for Communities (DfC) Northern Ireland, European Social Funding (ESF), Education and Skills Funding Agency (ESFA), Cabinet Office, etc. The list indicated past, present and potential Supply Chain Partners delivering an end-to-end (tier 2) service, integration / specialist (tier 3) and ad-hoc (tier 4) services.

In advance of the Assessment a survey was carried out of the Partners, all 171 were invited to participate. Responses were received from past, present and 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 in line with the agreed timescales to enable the assessment to take place as planned.

The assessment team spent a total of 2.5 days each reviewing documentary evidence and undertaking interviews with Reed staff involved in the strategic and day-to-day management of the supply chains. 25% of the end-to-end (tiers 1 and 2) Partners were interviewed as well as a representative sample of tier 3 and 4 organisations. Consideration was made to all Partners that were past, present and potential, and irrespective of whether DWP or other funders commissioned the contract.

The following report provides an indication of the findings against the criteria within the Merlin Standard, which was evidenced across all the supply chains referenced below, as well as areas of strength and areas to consider for development over the forthcoming two-years.

4. ABOUT THE ORGANISATION

Reed – a private sector organisation states that it '*provides public services that change people's lives for the better*'. The mission is '*to aim to deliver services that positively transform people and their communities*'. It defines itself by its core values that have been adopted across the organisation and supply chains; '*we work together*', '*we are fair, open and honest*' and '*we take ownership*'.

It supports individuals, businesses, families and communities to prosper – and since 1998 has delivered over 60 welfare to work contracts for DWP, working with over 25000 employers to place over 135000 people into employment. Over the years it has diversified and whilst it continues to be routed in the employment arena it has entered into skills and youth services.

In order to meet the customer's needs and those of the commissioner Reed recognises the value of working in partnership with other organisations and agencies and as a result has designed supply chains to deliver the services. The following provides an indication of the current contracts whereby a supply chain has been designed to provide the service:

Employment

DWP Work Programme, West London –	15% supply chain
DWP Work and Health Programme, North East –	55% supply chain
DfC Steps 2 Success –	62% supply chain
DWP Work Routes Hertfordshire –	20% supply chain
DWP Work Routes Cambridgeshire & Peterborough –	27% supply chain
DWP Work Routes Bradford and Leeds –	38% supply chain
DWP Work Routes Stoke and Staffordshire –	46% supply chain
DWP Work Routes Cornwall –	45% supply chain
DWP Work Routes South East –	51% supply chain
DWP Work Routes 50+ North East London –	22% supply chain
DWP Work Routes 50+ West London –	9% supply chain
DWP Work Routes Families South London –	43% supply chain

Youth Employment Skills

ESFA NEET (Not in Employment, Education or Training) Outreach –	100% supply chain
ESFA NEET LDD –	100% supply chain
ESFA NEET BAME –	10% supply chain
ESFA Mental Health -	8% supply chain

Youth Services

Cabinet Office National Citizen Service (NCS) East of England –	100% supply chain
Cabinet Office National Citizen Service (NCS) South West England –	100% supply chain

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:

Reed has engaged with organisations and agencies from different sectors including; public, private and third sector (charitable, social enterprise and community interest company). These organisations provide end-to-end, integrated and specialist services to meet the current and changing needs of customers as well as the contractual requirements. The design of the supply chains is under ongoing review to ensure they continue to address the needs of customers and the commissioner. In the event of a gap in provision being identified solutions are implemented, through sourcing additional end-to-end Partners but more frequently integration or specialist Partners are being sourced. (1.1, 1.6)

A range of strategies have been designed and implemented to deliver comprehensive services to stakeholders, customers and Partners through the use of wider networks. The recent launch of the Route Planner Tool (RPT), which is hosted on the Customer Management System (CMS) known as Orion, contains information on local services available, both paid and already funded, to address a wide range of barriers experienced by customers. RPT is available to all front-line delivery staff and has been widely used by Partners to contribute to designing customer's journey to address barriers for the Work and Health Programme. (1.2)

Consultation with potential Partners has become an integral part of Reed's approach to gain information to contribute to their bid submission and subsequently throughout the initial stages of designing the systems and processes, including the customer journey. Once the contract is live, Reed continue to consult with Partners to establish what is working well and identify areas to improve, including the systems and processes, reporting mechanisms, etc. (1.3)

Reed recognise the importance of working with Partners to ensure the successful delivery of the service, and Partners made frequent reference to *'it's a true partnership'* and *'we are all in it together'*. Similarly, Partners work collaboratively sharing data, practices and resources to ensure the contract is successfully delivered and meets the aims and objectives of the commissioner, as well as the needs of the customers. (1.4)

Historically, Reed has adopted a robust approach to procuring and contracting with tier 1 and 2 Partners and had designed a Supply Chain Management Framework (SCMF) to provide guidance to staff and Partners. Over the past year, a far more robust approach to procuring and contracting with tier 3 and 4 Partners has been designed and implemented, along with a Specialist Management Framework. Consequently, tier 3 and 4 Partners confirmed the Expression of Interest (EOI), due diligence and contracting was fit for purpose, and that they clearly understood what is expected of them and how performance was to be measured. (2.1, 3.1, 3.2)

Payment arrangements are defined in a schedule contained within the contract, or in the case of tier 3 and 4 Partners, this is outlined in the Service Proposal Agreement (SPA). Partners explained that they were advised of the process to raise invoices, which is straightforward, and subsequently, payments have been made accurately, and in a timely manner. Some Partners spoke of early payment been requested and subsequently paid to support cash flow issues. (4.2)

Reed recognise the importance of ensuring Partners are equipped to deliver the contract to fulfil its obligations, and as a result Partners are provided with support throughout due diligence to ensure the policies and procedures are fit for purpose. This continues throughout the life of the relationship. Extensive support is provided whilst mobilising a contract; a mobilisation plan and weekly telephone calls through to providing staff with access to a range of learning and development activities. In addition, Partners review and update their Provider's Organisational Capacity Development Plan on an annual basis, which identifies support required to ensure the organisation continues to be fit for purpose. (5.1)

Partners confirmed that they were assigned a Supply Chain Manager and an Operations Manager, who are their immediate point of contact, along with named personnel from quality and compliance, finance, etc. Similarly, tiers 3 and 4 had a named contact. A high proportion of Partners explained that Reed staff are readily available, accessible and responsive, and genuinely wanted to support them to be successful. (6.1)

A robust approach to performance management has been designed, which includes weekly tele-kits with the Supply Chain Manager, and monthly and quarterly Contract Performance Reviews (CPRs). A vast majority of Partners believe these activities are proportionate to the contract and provide the opportunity to discuss issues and challenges, as well as what is working well. Since the previous Merlin assessment in 2016 the performance management of the integration and specialist Partners has been improved as a result of the feedback provided. (6.3)

A range of policies, processes and activities have been designed and implemented to address the quality of service delivery and compliance requirements of the commissioner and to protect the Partners and Reed. Partners confirmed that these were robust and mitigated any risk as a result of non-compliance. They explained that findings from the audits and evaluation practices informed improvements, which were followed up by Reed to ensure implementation. (7.2)

Reed has started to be far more structured in its approach to measuring the positive impact on the customer groups, delivery staff, commissioners and the wider communities their programmes support. The Partner Forums provide a platform for the outcomes and successes to be discussed, and consequently, Partners were able to provide many examples of the impact the service has had on the different stakeholders. (8.3)

Clear exit plans are discussed and agreed with Partners opting to leave the supply chain for whatever reason. As a result, the expectations and obligations of both the Partner and Reed are understood. Regular communications take place with the Partner as the contract draws to a close, final audits are undertaken in a timely manner and support provided by Reed when needed. Consequently, final payments made to Partners are accurate and in line with expectations. (8.5)

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:

Reed has a set of core values which are reviewed with Partners before entering a relationship to ensure these are aligned. Partners also spoke of the commitment to equality and diversity by both parties, which is subsequently monitored throughout the relationship. Whilst some Partners referred to a Supply Chain Charter, this was not consistent. As a result, consideration could be made implementing this practice across all supply chains; mutually agreeing to a set of core values / principles by which the respective supply chain will operate. Subsequently, Partners could be measured against these and held to account to ensure these govern the way the supply chain operates. (1.5)

Partners are aware of the management fee and what they gain for the money paid, for example, support from a Supply Chain Manager and others within Reed, performance management, quality and compliance audits, IT system, access to learning and development, etc. Whilst a high proportion of Partners believe the fee is value for money, consideration could be made to having a more proactive and flexible approach. For example, designing a menu of service options, which Partners actively negotiate based on their needs and level of maturity when delivering a contract. (4.3)

A training needs analysis is undertaken with a high proportion Partners through the CPR process and annual Provider's Organisational Capacity Development Plan activity resulting in a range of learning and development activities being provided. In the future, consideration could be made to evaluating the impact of learning and development and establishing the difference made to performance levels. (5.3)

A range of activities have been designed and implemented to provide Supply Chain Managers with the tools and resources to manage the supply chain effectively, including but not limited to the Provider's Organisational Capacity Development Plan activity, Self-Assessment Review (SAR) resultant in a Quality Improvement Plan (QIP), analysis of reports, etc. Some Supply Chain Managers work with Partners and complete activities in a robust manner; however, there was evidence of inconsistencies. Whilst the introduction of the role of Senior Supply Chain Manager may address this over a period of time, consideration could be made to ensuring all Supply Chain Managers clearly understand what is expected of them; adopt a positive and supportive approach to enable all Partners to be successful and ensure activities such as the Provider's Organisational Capacity Development Plan, SAR and QIP are completed in a meaningful and beneficial manner. (5.2, 6.2, 6.5, 6.6, 6.7, 7.1, 7.4, 8.4)

The Partner Evaluation of Service inform Reed of developments to consider to improve the management of the supply chain; however, Partners fail to appreciate the action taken as a result of their feedback. Consequently, Reed is encouraged to implement its plans to inform Partners of the action taken, through a '*you said, we did*' approach. In addition, consideration could be made to sharing the findings of other external audits, assessments and inspections, and the actions planned as a result, which may impact on Partners. (8.1)

7. FINDINGS

PRINCIPLE 1: Design

Reed gain a thorough understanding of the commissioner's aims and objectives prior to bidding for new business to ensure it is aligned to the current strategy '*to deliver services that positively transform people and their communities*'. Extensive research is undertaken and includes a review of the respective Local Enterprise Partnership (LEP) and Local Authority (LA) priorities, along with relevant data available, for example, official labour market statistics, indicative numbers, barriers to employment, etc. In addition, Reed engages with potential Supply Chain Partners to gain detailed information regarding the area, customer groups and to establish their area of expertise in delivering the service required.

To provide a service to meet the needs of the customers and the requirements of the commissioner, Reed recognise the importance of designing and working with supply chains that are made up of different types of organisations. In terms of meeting the commissioner's requirements, this was evident within the Work and Health Programme (WHP) whereby the commissioner required 33% of the supply chain to be Small Medium Enterprises (SME). Currently, the supply chain is made up of 37% SMEs.

Consideration is also made to working with organisations from the public, private and third sectors as well as those of different legal entities and varying sizes that provide national, regional and local services. At the time of the accreditation review, Reed supply chains were made up of 42% from the voluntary / charity sector, 46% from the private and 12% from the public sector. The use of tier 3 and 4 Partners continues to rise in order to address a diverse range of barriers and needs experienced by customers. Partners confirmed that there was a good mix within the respective supply chain, which resulted in healthy competition in most cases as well as opportunities to share practices and resources to benefit the customers and achieve the performance expectations. Also, reference was made to having access to local specialist services, which contributed to designing bespoke services for the customers. Some Partner comments included:

"We were chosen as we have specialist knowledge of NEET young people in our localities."

"We were delighted to be included in the bid (WHP) as we are experts in working with deaf customers and we were again delighted that Reed were prepared to sit and listen to us."

"We met the whole mix of other SCPs and our case studies of specialist work informed the bid."

"We are aware of the other SCPs and often share good practice and resources."

The use of wider networks is actively encouraged by Reed in order to address gaps in provision and provide support to customers. The appointment of an Integration Manager for the WHP supports the strategy, encourages broader stakeholder engagement and also provides a more cohesive approach to gaining access to specialist / ad-hoc providers within the supply chains. This was evidenced in Newcastle whereby the Improving Access to Psychological Therapies (IAPT) service had too long a waiting list, so another specialist was commissioned to deliver this.

The RPT as referenced previously is built into the Orion system, and this has been developed as a central, internal directory of local provision, which provides a description of the service offered and indicates the funding / payment arrangements. The Integration Manager is responsible for updating the information, which has proven to be a valuable resource to front-line deliver staff across the supply chain. There are currently 150 specialists listed, and there have been 800 referrals to specialists, at the time of the accreditation review. For example, 80 people have been referred to a training provider which delivers employability skills through a theatre programme, suitable for those with low literacy skills. One Partner comment included:

"Reed circulated more information about the other Supply Chain Partners and their services so we could look for opportunities together."

Over the past two-years, Reed have proactively consulted with potential Partners to inform their bid submission and subsequently gained their input into designing the systems and processes, including the customer journey. Partners within the WHP spoke positively regarding the consultation activities prior to contract mobilisation and felt their views and opinions were considered when designing the systems and processes in the new flexible and customer centred model.

Similarly, following contract mobilisation Partners spoke of ongoing consultation regarding the systems and processes, and the opportunity to influence changes or improvements. Some examples gained from Partners included consultation to establish a plan to reduce the number of calls being made to the compliance team, and as a result fortnightly tele-kit were planned and executed, and subsequently, daily calls reduced significantly. On another occasion, consultation regarding the referral process led to changes, whilst within another supply chain, Partners were consulted regarding the reporting requirements which resulted in a range of reports to incorporate performance and quality assurance. Some Partner comments included:

"Very fair and transparent – with a clear journey mapped out and information readily shared."

"Very efficient and professional in consulting with us."

"We were fully consulted."

Reed actively work with Partners to ensure the successful delivery of the service; sharing resources and practices adopted by the direct delivery team. One tier 4 Partner spoke of working with Reed to deliver employability courses, whilst a tier 1 Partner referenced the sharing of vacancies and the provision of shadowing opportunities.

Partners are encouraged to work collaboratively, and there were numerous examples of sharing practices, discussing and resolving issues through to sharing access to training activities, sharing vacancies, referring customers to other better equipped Partners, as well as working together to support a specific customer. One Partner referred to providing coaching to an underperforming Partner, whilst another arranged a shadowing opportunity for a new member of staff. A tier 4 Partner spoke of working closely with another Partner and successfully gained employment for two customers in retail. Another Partner highlighted joint staff training with a LA, which resulted in collaborating on training materials and created economies of scale where there are only a few new staff in each organisation to train.

The Integration Managers produce frequent bulletins to share the specialist offers to the tier 1 and 2 Partners with the aim of working together to deliver a bespoke service to the customer. Some Partner comments included:

"We shared our caseworker who is good on compliance with another Supply Chain Partner and they saw less rejections as a result."

"Collaboration is open and candid – we don't have to hold anything back."

"We work with two other providers to support the different customer groups."

The core values identified by Reed; 'we work together', 'we are fair, open and honest' and 'we take ownership' are discussed at length with potential Partners prior to entering a relationship. Partners confirmed that they also had the opportunity to openly share their values and what these mean in practice, and as a result, both parties assured themselves that there is a common approach to business. Subsequently, Partners spoke of these values been the basis by which the respective supply chain operates. Some Partner comments included:

"Our values are discussed and working with Reed supports our core mission of supporting local people."

"Both our organisations are about supporting the most disadvantaged people in deprived areas."

"Client focus and community support is important to both of us."

"Reed is up front and easy to work with."

"We have a close working relationship to deliver the programme to meet our common goals."

"We're a charity, and Reed is private but they are very charitable and a percentage of their profits go to charity."

Whilst a few Partners made reference to a Supply Chain Charter, this was not consistent practice, however, one Partner comment included:

"The Supply Chain Partner Charter was consulted on by Reed with Supply Chain Partners and we all feel we have had input."

Similarly, Reed and Partners made reference to the commitment to equality and diversity and the work being undertaken to demonstrate how this is embedded across the supply chains. Reference was made to policies and procedures, provision of learning and development, monitoring of relevant data and a commitment to be recognised with an appropriate level of the Disability Confident Employer award. Some Partners spoke of the support being provided by Reed to enable them to achieve the level two status, whilst Reed and working towards the level three.

The design of the supply chains is under ongoing review to ensure they continue to address the needs of customers and the commissioner. For example, in order to meet the growth plan for the provision of the NCS, consideration is made to the capacity and capability of current Partners with the aim of increasing their delivery, as well as reviewing gaps and identifying the need for new Partners. The WHP is under constant review with the Integration Managers evaluating the changing needs of customers and the need to gain specialist support.

Partner's performance is monitored and as a result over the past two years some Partners have left the supply chain due to underperformance and new providers introduced and / or existing Partners have had the opportunity to increase their provision. Reed have contingency plans in place to respond to such changes, and consideration is made to increasing the direct delivery in the first instance in order to continue the service to customers. Some comments included:

"We review for capacity and capability as growth targets are immense." (Staff)

"We review the supply chain and have introduced new Partners and built the capacity of current providers." (Staff)

"The current supply chain has evolved; some smaller SCPs have withdrawn and some new ones come on board." (Partner)

PRINCIPLE 2: Procure

Reed have adopted a range of communication methods to promote the opportunities to partner with them, which starts by encouraging potential Partners to join the Partner Network. Currently there are in excess of 650 national, regional and local organisations from different sectors and of varying size within the network. Subsequently, the opportunities to partner with Reed to deliver a specific contract are promoted to the network through the website, newsletters, emails and direct approach from a member of staff. In addition, pre-bidding meetings are often hosted to promote the opportunity to potential Partners and to provide additional information regarding the offer available, ensuring a clear understanding of the commissioner's aims and objectives at the start.

Partners confirmed that they were provided with extensive information relating to the proposed offer, and subsequently support was available, if required to complete and submit a bid. Throughout the period prior to contract award Partners confirmed that they were kept abreast of critical decision-making dates, and timely communications took place once the contract had been awarded. Some Partner comments included:

"We registered our interest, they explained the EOI process, and we also had a telephone interview to ensure we were fit for purpose; like premises, staffing and previous performance."

"The offer pack was very detailed and there was an opportunity for dialogue."

"Communications were really good, Reed were the friendliest and most helpful of all the Primes we bid with."

"They explained the rationale for requiring so much information."

"As a specialist provider – it was straightforward."

Successful and unsuccessful Partners confirmed that feedback was provided relating to the bid submission, which was useful for future reference. Some Partner comments included:

"We were successful and got feedback, which was great."

"Feedback on the EOI was given and we were given a score as well as strengths and areas for improvement – this is all really useful stuff for us."

Post-contract award Reed undertakes due diligence and hosts a range of meetings at supply chain and individual level to ensure Partners are fully prepared for the contract to start. Partners, including tiers 3 and 4 made reference to a robust, but supportive approach to due diligence which was fit for purpose and ensured policies and procedures met the commissioner and Reed requirements.

A full analysis of new contracts, changes in contract ownership and Partner organisations is undertaken to establish the TUPE liability; Transfer of Undertakings (Protection of employment) regulations. The key aim is to ensure Reed are operating in line with the requirements of the commissioner's contracting requirements and legislation. If required, the TUPE strategy is mobilised to transfer staff from and into Partner organisations. There has been minimal TUPE activity over the past two years whereby staff have either transferred into or out of Reed, however when required, the Human Resources team oversee the process.

Some Partners made reference to the support gained from Reed in relation to TUPE to ensure it wasn't too burdensome once the details had been finalised. Reed recognise the boundaries concerning TUPE and advise Partners to seek legal advice if TUPE is seen to be a requirement. Some Partner comments included:

"Reed gave us their view on TUPE but have given us the option the supply chain is successful in winning the contract and the TUPE information isn't quite right from the incumbent Prime, then we have the option to change our mind about our involvement."

"Reed helped us achieve a seamless transfer."

"The Supply Chain Manager attended meetings with us at the College, just as support."

Partners clearly understood the rationale for the allocation of the market share and felt this was viable and transparent as it was predominantly based on either location, area of expertise and / or performance. Some Partners referred to the opportunity to negotiate between themselves, for example, two Partners had agreed a 50/50 split based on postcodes, however, they subsequently felt this was unfair as one party was being disadvantaged and as a result, the allocation was going to be reviewed.

Partners are confident to challenge and renegotiate their allocation. For example, one NCS Partner spoke of achieving 20% participation within schools and is consequently renegotiating additional market share. Similarly, Partners spoke of giving back a percentage of the market share for varying reasons, which was openly discussed and subsequently Reed was very supportive to make the changes. Some Partner comments included:

"We have 17% of the NEET outreach contract and 25% of the NEET LLDD contract – and this has changed since the start of the contract."

"We were struggling due to a staff shortage and so handed an area back reducing our market share but enabling us to do a better job in the other area; Reed were helpful in meeting this request."

"It is very transparent, it is based on the Borough that we operate in."

Reed proactively negotiates volume, funding / finance and performance expectations with Partners, prior to the submission of the EOI to gain an indication of Partner's expectations which is reviewed in detail throughout contracting discussions. Throughout the life of the contract volume, funding / finance and performance expectations are reviewed and if appropriate renegotiated. In some cases, for example, the NCS this is season-by-season, whilst other contracts are for a given period of time; two or three years. However, Partners are confident to raise discussions at any stage to increase or decrease the volumes in order to ensure the success of the supply chain overall. There was evidence of Reed reviewing the impact on Partners when they were notified that the service was VAT exempt, and as a result, every effort was made to ensure they were not disadvantaged. Some Partner comments included:

"Very proactive, they asked Partners to submit their figures first."

"We have profiles through to January 2020, which we are happy with."

"Its reviewed for every season, and numbers are renegotiated based on performance."

"They're very flexible."

PRINCIPLE 3: Contract

Reed prepare and share contractual documentation with Partners and invest time in reviewing the contents with them to ensure a full understanding of the obligations. There were examples whereby Partners had recommended changes that were accepted by Reed. Tiers 1 and 2 are in receipt of a formal contract and tiers 3 and 4 have a Service Proposal Agreement (SPA). Partners confirmed that the documentation was straight-forward and easy to understand, and if there are any uncertainties they are confident to raise the issue and challenge. Some Partner comments included:

"We were able to give feedback on the Service Proposal Agreement requirements and this is supported by the Integration Managers who are both excellent."

"Contracts come through quickly and it is usually quite clear."

Throughout the life of the contract, where contractual changes are required either by the commissioner, Reed or the Partner a contract variation is issued. Once again time is spent with the Partners if needed to ensure a clear understanding of the changes. This was confirmed by Partners (tiers 1 and 2) who re-negotiate volumes on an annual basis.

The communications throughout procurement activities clearly outline the performance expectations, which are confirmed at contract award with a formal 'introductory letter' outlining the service offer and the expectations / requirements throughout the life of the contract. The contract or SPA formally confirm the performance expectations which are reviewed on a weekly and / or monthly basis, in line with the CPR process. Performance is also regularly discussed at Service Delivery Boards / Partner Forums where all Partners are present. Some Partner comments included:

"We understand performance expectations at Service Delivery Boards and this helps Supply Chain Partners see how we contribute to the bigger picture."

"You have to hand it to Reed, they are clear about performance expectations – sometimes the performance calls can feel unpleasant if you are underperforming but they do it really well."

"Very clear, contract, weekly tele-kit, monthly and quarterly performance reviews."

Reed has clear dispute resolution channels which are publicised to Partners throughout the initial meetings and on the website, and also outlined within the contract / SPA. This includes a statement that the Organisation will respect any decision of third-party mediation. At the time of the accreditation review there had been no disputes in writing that had been submitted through the internal dispute resolution process. A high proportion of Partners confirmed their awareness of the dispute resolution channels or at very least knew where to find the information. Some Partner comments included:

"We are aware of how to complain to and about Reed but we have never needed to. We are clear about the Supply Chain Manager hierarchy and who to contact in the Reed central team to raise issues if we need to."

"We've never got to that level of formality – it's all clear in the contract how to complain and Reed gave us the names of senior staff who we can escalate to."

PRINCIPLE 4: Fund

Reed works with Partners to ensure that funding and payment arrangements are fair, proportionate and do not cause undue financial risk. Prior to contracting opportunities to undertake financial modelling with a representative of Reed are available. If changes are made to the funding and payment arrangements throughout the life of the contract, once again, Reed review the financial implications with Partners to ensure the contract continues to be viable.

Throughout the reaccreditation review there was evidence of some changes to funding arrangements, for example, one Partner spoke of Reed agreeing to pay a flat rate service fee so that the charity could support the extra staffing costs. Whilst another referred to Reed helping with set up costs to support the move into a new area. Some Partner comments included:

"The flat fee suited us much better than a Payment By Results payment and Reed were really helpful and sent the figures over to us to help us present this to our Board."

"The funding model is much better for specialist Supply Chain Partners (WHP)."

"We re-worked the delivery model with them, and now it is financially viable."

A systematic approach has been adopted to manage the transfer of funds, and the financial procedures and processes for claiming money due are clearly outlined. The payment schedules and invoicing systems are made clear at the start of the contract, and Partners have a point of contact within the finance department to enable them to ask questions and resolve any invoicing issues quickly.

All Partners irrespective of the service provided made positive comments regarding the self-billing process, which reduces the administrative burden and the time delay between service delivery and receipt of payment. The average number of days that an invoice is paid is within 23 days of the invoice been raised. Some Partners spoke of additional and / or early payments being made when requested to support cash-flow issues, which were accepted by Reed. Some Partner comments included:

"Latterly payments have been accurate and on time."

"Paid one month in arrears and always accurately and on time."

"Always very honest."

"Payments follow exactly as expected."

"Self-billing is really helpful – Reed sends us a breakdown by participant so we can ensure we are expecting to get what we are due to be paid."

"We asked for an early payment to be able to pay the salaries, and Reed agreed the process."

Partners had a clear understanding regarding their management fee. They were very clear what they received in return, and a number spoke of the fee being value for money. Partners made reference to the support gained as a result of the payment; performance management, quality and compliance, learning and development, management information, resources on Google drive, etc. Some Partner comments included:

"We definitely get value for money from the management fee as a small charity."

"The management fee gets us some really good management information, it supports compliance, Supply Chain Manager support and training – this is really good value for money."

PRINCIPLE 5: Develop

As previously stated, Reed provide Partners with a range of support to ensure they fulfil their contractual obligations from contract award onwards. This starts at the point of due diligence whereby policies and procedures are reviewed to ensure they are fit for purpose, and where required support provided. When mobilising a contract; a mobilisation plan is designed and Partners participate in weekly telephone calls to provide the opportunity to discuss any challenges and identify solutions. In addition, staff are provided with access to a range of learning and development activities to equip them with the necessary knowledge and skills to deliver the service. For example, WHP delivery staff attended a two-week training programme and a guidance document was released to provide further support.

Throughout the life of the contract the CPRs and annual Provider's Organisational Capacity Development Plan identify and address other areas of support required. For example, updating policies and procedures, reviewing the business strategy, marketing, designing and updating an environmental sustainability plan, support to work towards accreditations; ISO27001, Green Mark, **matrix**, etc.

All present and potential Partners are made aware of current and future bidding opportunities through the Partner Network and quarterly newsletter. Existing Partners are also informed of opportunities through regular communication updates and Service Delivery Boards / Partner Forums. On occasions, a representative from Business Development attends Service Delivery Boards / Partner Forums to discuss current and upcoming opportunities, as well as those Reed is not bidding for, but Partners may be interested in. Reed support Partners in their bid writing activities if requested, and throughout the reaccreditation review there was evidence of collaborative working with a Partner providing a joint bid. Some Partner comments included:

"Reed recommended us based on our good performance and we investigated whether the funding would help us as a charity."

"We are part of the Reed Partner Network and so we receive Expression of Interests for any bids they are going for."

Reed provide Partners with the opportunity to grow in an existing contract, as well as diversify and move into a different contract. However, a fair and transparent approach is adopted as the opportunities are promoted to all existing partners, and a mini EOI process is undertaken. This process is kept as simple as possible and not unduly burdensome for Partners.

A range of learning and development activities are made available to all Partners throughout the life of the contract. Partners gave the following examples:

- Training in relation to checking the quality of files, how to conduct observations and some client progress training,
- Quality and compliance training, SMART target setting training, systems training (Sunesis system),
- Safeguarding advice led to a member of staff undertaking appropriate external training and becoming Designated Safeguarding Officer,

- Advisor training, including sharing of practices, shadowing and tele-kits to review new processes, and
- Salesforce training, school engagement and recruitment strategies.

A tier 3 Partner made reference to being offered the same training as Tier 2 Partners, including certificated training; Certificate in Counselling.

Some Partner comments included:

"Training is really good and is regularly refreshed as well."

"Reed helped us a lot by providing our new caseworker with a chance to shadow their direct delivery staff and this took the pressure off our own existing caseworkers."

"Reed paid for the mental health training; other Primes charged."

"We have had observation training."

"As a new manager I was provided with coaching for the role."

"All new staff get an induction to the contract."

"The Partner Forums, webinars and one-to-one support are all effective."

PRINCIPLE 6: Performance Manage

Partners were fully aware who within the Organisation was responsible for key aspects of communication. The Supply Chain Manager was noted as the key contact and in the event of their absence the Operations Manager. In addition, named personnel were available to support finance queries, quality assurance, performance management, etc. In the case of tier 3 and 4 Partners reference was made to an Integration Manager. In addition, named contacts for quality and compliance and finance were cited. One Partner also spoke about the marketing department helping to produce materials and letters for NCS recruitment activities. A large proportion of Partners confirmed these individuals were consistently approachable, accessible and responsive to their needs. Some Partner comments included:

"Overall it is the Supply Chain Manager or if they are away, the Operations Manager."

"There are others who can help you, for example the marketing department helped us with some recruitment materials to help increase our numbers."

"Finance are always available to help with queries – very open."

"The Supply Chain Manager is always available and responsive."

"We have an Integration Manager as a key point of contact."

"The relationship is good, very supportive."

"The Supply Chain Manager is sharp, and very supportive."

"Perfect relationship."

"We've had a good relationship for four-to-five years."

Reed has created a culture across the supply chains in which communication is open, honest and without unreasonable constraint. Formal communications include weekly tele-kits, monthly CPR, Service Delivery Board / Partner Forums, along with emails and bulletins. However, a number of Partners also made reference to the informal communications, ad-hoc telephone calls and emails. One Partner described – '*communications as amazingly good given that this was the first Payment By Results contract*'. A large proportion of Partners confirmed that the interactions between the staff of Reed and themselves were positive and supportive at every stage of the contract. Some Partner comments included:

"Communication is clear and transparent – we have all agreed to share our performance information."

"Communication and support has been exemplary."

"Communication has always been good, open and honest whoever you deal with."

The weekly tele-kit and monthly CPR were cited by Partners whereby a formal review of performance against profile and key targets is undertaken. In addition, Partners made reference to the Service Delivery Board / Partner Forum as another mechanism to review performance. Partners are confident to discuss issues and challenges relating to the contract, including the terms and conditions, relationships with external stakeholders, as well as resources. Partners also explained that they were encouraged to talk about their successes and innovative approaches. For example, ways to re-engage customers, how to embed functional skills within the delivery, running bespoke Special Education Needs (SEN) programme, running a Muslim girl only programme and changing from using post-box to jiffy bag system in schools to improve speed of information about recruitment.

Some Partner comments included:

"We have a regular monthly performance review."

"The Partner Forum usually has a theme and recognises performance and innovation- for example one SCP has a good SEND programme and so we will be using this in September."

"We have been helped to identify new opportunities for outreach work will help us address the shortfall in starts on the programme."

"Supportive, listen to your concerns; a lot of carrot, very little stick."

"You can talk about anything; open and trusting both ways."

Whilst Orion is the main platform used by Reed to gain management information, some contracts require the use of others for example, Sunesis for Not in Employment, Education or Training (NEET) and Salesforce for NCS. Irrespective of the system used Partners confirmed that accurate and real-time management information was always available.

Since the last Merlin accreditation review Reed have invested in the appointment of a Head of Management Information, and as a result lessons learnt have been applied. For example, the approach to management information for the WHP was as a result of the learning from the Work Routes contract. The system offers more reporting functions at different levels to support Partners to fully understand the trends and gaps in service delivery. The NCS Trust mandates the use of Salesforce for the NCS contract, however, Partners spoke positively regarding the improvements over the past two years, achieved as a result of feedback from the Primes to the Trust. Some Partner comments included:

"Orion is easy to use."

"We have used MI to improve the recording of the in work support process."

"MI reports are accurate and detailed. We have used them to help us forecast and set actions on our own quality improvement plan."

"Sometime Salesforce is not that user-friendly but it was the NCST require that we all use. Reed are very good at responding to requests about it however."

"We had intensive training on Orion and reports helps us manage our caseloads better."

"Share data to benchmark and identify what is working / not working."

"The information gained really helps us to drive performance."

Reed has designed processes to measure the distance travelled by customers to enable Partners to track progression and identify barriers far more efficiently. Some examples included the development of a worksheet to ask the right questions to record in work support as a way of improving performance and the Integration Manager using a distance travelled tool for participants that assesses how barriers are being reduced through specialist interventions. Some Partner comments included:

"Reed did a really good job when anything was rejected – they helped us by escalating it with DWP and on some occasions we had the decision overturned."

"We use MI to look at patterns of where the barriers are compared with where the referrals are being made and this helps understand their distance travelled. "

Partners are supported to improve their performance through the weekly tele-kit and monthly CPR. However, on occasions if they are under-performing and / or there are concerns regarding quality and compliance they enter into a Service Improvement Process whereby they are issued a Service Failure Notice; a Service Improvement Plan is completed in consultation with the Partner and targets are set for a given period of time. Additional support is provided to Partners, as required, and ongoing monitoring takes place. Consequently, Partners confirmed that performance improvements had been made, and in some cases, they were over-performing due to the focus. Some Partner comments included: *"We were on a SIP for six-months, it was a supportive process and we managed to get our performance back."*

"They gave us ideas to promote the service better, like the bus that we have access to."

"We reviewed our performance together and updated our delivery model which worked."

The Service Delivery Boards / Partner Forums are the primary methods for Partners to share information relating to performance and best practice. In addition, Supply Chain Managers were cited as being a resource for sharing best practice throughout the monthly CPR. Numerous examples were gained whereby different practices were shared, some included:

- Ideas for assemblies and sign up packs to improve conversion rates,
- Ideas on time management and an email template for use with employers,
- Integration Manager has sourced equine therapy specialist to support women with mental health issues, and
- Conducted a 'Shake the Tree' day whereby the whole supply chain was involved in data mining in a fun way that resulted in finding £140K of under claimed performance.

Some Partner comments included:

"Relationships with other Supply Chain Partners is good."

"Collaboration and sharing best practice is encouraged by Reed."

"We talked about the best way to retaining staff and business engagement."

"Customer journey; we shared our approaches to managing disengaged customers at the registration stage."

"We shared our approaches to using the LMI (Labour Market Information) and challenging customer's work goals."

A quality improvement framework is in place underpinned by a fully embedded Quality Improvement Policy. The Policy includes details of the annual SAR and QIP processes and how these inform improvements. The information for the SAR is gathered on a continuous basis through management information meetings and tele-kits, CPRs, Service Delivery Board / Partner Forum, observation of practice, file checks, case studies and the Evaluation of Service feedback mechanisms. Partners confirmed that they were aware of the range of methods used to complete the SAR.

Partners spoke of submitting their own SAR and QIP, which was also incorporated into the overarching supply chain / Reed QIP. Reference was made to this being reviewed at the Service Delivery Board / Partner Forum, and there was recognition that their views and opinions had been taken into consideration. Some Partner comments included:

"Supportive at quality improvement planning."

"Elements of the Reed QIP are shared at the Partner Forums."

PRINCIPLE 7: Quality Assurance and Compliance

Reed keeps Partners informed of wider policy and strategy, as well as legislative and regularity requirements and updates through a range of processes. These include dissemination of DWP's Live Running Memo, DWP and JobCentre Plus (JCP) newsletters and bulletins, weekly communications relating to relevant process changes or updates from commissioners, and a standing item on the agenda at the Service Delivery Board / Partner Forum. Partners spoke of the different mechanisms and confirmed these were appropriate and timely. Specific reference was made to emails and the Service Delivery Board / Partner Forum regarding the requirements for the new General Data Protection Regulations (GDPR) being communicated. This has subsequently been followed up to ensure appropriate action has been taken, and / or support provided to the Partner to address the requirements.

If deemed appropriate Reed provide and continually update learning and development activities to ensure staff understand the implications of any update. For example, safeguarding and prevent, and more recently GDPR. Similarly, changes made by commissioners, for example, eligibility criteria, documentation requirements, etc. result in additional support being provided to Partners to ensure they understand the expectations.

The Quality Improvement Policy, referenced previously, is underpinned by a range of policies, processes and activities to address the quality of service delivery and compliance requirements of the commissioner, and to protect the Partners and Reed. These include file audits, pre-validation checks, observation of practice as well as the Evaluation of Service from customers and a review of performance against the Customer Service Standards.

Partners explained that findings as a result of the activities were reported and a timescale for implementation provided, which was subsequently followed up. Partners made reference to some findings, for example, customers with no future appointment date, customers with no email address, etc. and as a result clearly understood the action to be undertaken. Partners confirmed that the compliance and quality practices were extensive, robust and mitigated any risk. Some Partner comments included:

"We had a compliance tele-kit weekly where we discussed our list of 'fails', this helped us to address them and reduce our risk of ESFA clawback in the future."

"The Reed compliance team have a KPI to reply within a set number of days and are always very prompt at getting back to you."

"Quality observations are quite helpful; it helped us to improve our workshops to be more young people focused."

"Compliance activities are robust and helped them to minimise the risk with the ESFA."

Whilst a number of Partners are **matrix** accredited, which recognises that the information, advice and guidance (IAG) to customers and other stakeholders is effective, Reed undertake observations of practice of Partner's delivery staff. This is conducted on an annual basis to provide further assurance of the IAG provided to customers. In addition, the Evaluation of Service for customers also provides feedback relating to the IAG provided, and this is followed up by Reed to ensure any shortfalls are addressed. Some Partner comments included:

"Reed undertake really good observations of how our caseworkers deliver IAG to customers."

"Overall fantastic – quick and well prepared communication from the Integration Manager means we can offer great support to our learners."

*"They are supporting us with our **matrix** accreditation."*

Reed are accredited with the **matrix** standard, which recognises that the IAG to customers, employers and Partners is effective and meets the stated requirements. A large proportion of Partners confirmed that the IAG provided was relevant and met their needs. Some Partner comments included:

"The information and guidance from Reed on policies, in particular safeguarding is really useful."

"The information appears to come from a reliable source, as far as I know its accurate."

Reed have a robust approach to due diligence, which includes the review of a range of Partners' policies and procedures, including data security, health and safety, safeguarding and environmental sustainability. In addition, the annual governance check ensures that policies are current and reflect changes in regulatory and legislative requirements, such as safeguarding, GDPR and the Modern Slavery Act. In the case of tier 2 and 3 Partners; they undertake their own due diligence and subsequently sign a declaration to this effect.

As previously stated, Partners are provided with extensive support to ensure their policies are fit for purpose. A key strength is the contribution of the Reed Safeguarding Lead who checks the Partners' policies at the due diligence phase and that staff have full enhanced DBS checks as well as reviewing the training records for safeguarding, prevent and e-safety. In the event of gaps being identified appropriate support is provided. For example, advice and guidance relating to the policy, additional training, attendance at the Service Delivery Board / Partner Forum and a monthly safeguarding bulletin is produced and shared, which is valued by Partners. Some Partner comments included:

"They have really helped us to develop our safeguarding policy as a Supply Chain Partner."

"The Reed Safeguarding Lead has been a massive help not only to the part of the organisation they contract with but to another part of our business as well."

Reed have addressed the requirements of the Modern Slavery Act 2015 through policy statements, which are reviewed annually. Information has been provided to Partners outlining the requirements and what this means in practice. One staff member comment included:

"We have shared what compliance with the principles of the Modern Slavery Act means and what this would like in the working world, not just what you see in the media."

The Modern Slavery Act also forms part of the due diligence process, along with the other policies and procedures to ensure the requirements and the relevant criteria are being addressed by Partners. Once again, if required, support is provided to ensure policies and statements are fit for purpose. A number of Partners made reference to the information provided by Reed, and having access to their policy and statement for guidance – *'there has been a focus on the Modern Slavery Act and help has been provided to develop a policy and a statement'*.

PRINCIPLE 8: Review and Close

Reed seek feedback from a range of stakeholders, which contributes to its continuous improvement plans. Feedback is gained and utilised as a result of Ofsted inspection, ESF Compliance Monitoring Officer (CMO), DWP Provider Assurance Team (PAT), National Citizen Service Trust (NCST), as well as Merlin and **matrix** Standards, Customer Service Excellence, Investors in People, ISO Standards, to mention a few.

Partners spoke of being encouraged to provide feedback to individual representatives of Reed, as well as through the Service Delivery Boards / Partner Forums to support the plans for continuous improvement. In addition, the annual Evaluation of Service is undertaken, which seeks to gain formal feedback from Partners to inform improvements to the way they work together. Some Partner comments included:

"Reed were instrumental in seeking DWP feedback and getting a change as a result."

"Some of the Regional Development Partners (primes) tell you what's happening whereas Reed speak to us before and after they meet with NCST – it feels like we've had a say."

Reed provide Partners with information relating to the wider social objectives / policy intent of the commissioner prior to and throughout the life of the contract. Partners were aware of these and cited the impact they had. Some examples included:

- Reduction in the unemployment figures, resulting in less reliance on benefits,
- Addressing the ageing workers and supporting the 50plus to remain in work,
- Improved health and wellbeing, addressing mental health issues,
- Contributing to community regeneration projects to develop people's employability skills,
- Improved family lives, and
- Addressing social mobility; increasing the economic stability and education levels, etc.

In addition, Partners had a good understanding of the positive impact on the intended customer groups, external stakeholders and the wider community. Some examples and Partner comments included:

- Impact on 40 deaf customers already referred onto WHP and seven moved into employment,
- Improved family dynamics and improved young peoples' progression, and
- Increased young peoples' aspirations, increase in confidence, leadership skills and independence.

"There is an increase in activity in communities and an increase in volunteering rates."

"Impact comes from money the young people raise for good causes."

"The impact is much greater as we can include mentoring to address additional and ongoing barriers."

"Young people gaining skills that they wouldn't get in school."

"Young people progressing into youth leaders and volunteering in the local community."

"Breaking the third generation of unemployment."

"Staff have had the opportunity to develop a range of skills and knowledge."

Reed clearly states its commitment to equality and diversity through the strategy, policy statement and plan, Disability Confident Employer Award and support provided to staff through a broad range of learning and development activities. Consequently, it expects a similar level of commitment from Partners, for example, strategies, policies and plans that are aligned. This is addressed throughout due diligence and subsequently through CPRs and the annual Provider's Organisational Capacity Development Plan.

Partners confirmed that their policy for equality and diversity are aligned to that of Reed due to the robust due diligent, which is followed up in the CPR and annual governance check. A few Partners spoke of the support gained to ensure the policy and plan met the requirements of the commissioner and Reed. Some Partner comments included:

"Reed provided us with some support with our equality and diversity plan which was useful."

"We had their equality and diversity policy as a template."

Data relating to equal opportunities is identified and consistently collected and the management information gained is analysed and used to inform improvements across the supply chain. This is reviewed at individual Partner level and across the supply chains throughout the Service Delivery Board / Partner Forum meetings. One Partner made reference to the information being discussed during the Service Delivery Board meetings such as BME and age profiles and action taken to address any shortfalls, for example, engagement with under-represented groups. Another Partner spoke of using the data to look where they can target outreach work, for example, Friday at the mosque. Some Partner comments included:

"We feel that Reed and its approach in the Work and Health Programme will really change deaf peoples' lives."

"Reed promote equality and diversity through training and workshops."

"Reed promote equality and diversity via workshops and send materials out for use with staff. Data is collected on Salesforce around social mix, ethnicity, gender and the targets are adjusted to take account of the local population make-up."

A clear process has been designed, which is implemented when a Partner leaves the supply chain for any reason; voluntarily, service failure notice or due to contract end. Clear exit plans are discussed and agreed with individual Partners to ensure the expectations and obligations are understood. Throughout this process Partners have the opportunity to clarify their understanding on any aspect of the plan, request support or agree amendments, where feasible. Consideration is made to the continuing performance levels, quality of service to customers, compliance requirements, as well as TUPE and final payments.

A checklist has been used with Partners, which has proven to be effective, which have been complemented by weekly tele-kits to provide the Partners with additional support or guidance to deal effectively with each stage of the closedown, including that relating to premises, staffing, etc. Some Partner comments included:

"Reed was very patient with us; our file failure rate was very high and so they linked us with another Supply Chain Partner during the exit phase to address and fix the issues – I can't praise Reed more highly and we would definitely work with them again."

"There were visits and conference calls that meant the whole exit process worked smoothly."

"Reed have been flexible around contract closure. We were due to end but as we are still working with young people, then they have arranged for us to claim the outcomes beyond the formal contract end date."

"An exit plan was designed and implemented – clear expectations and timescales."

"We would certainly work with Reed again."

8. CONCLUSION AND CONDITIONS OF ACCREDITATION

In conclusion, this accreditation review provided the opportunity to review the practices of Reed 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.

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@assessmentservices.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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