



merlin standard

CUMBRIA CHAMBER OF COMMERCE

COMPACT REPORT

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1. KEY INFORMATION

Assessment Type	ACCREDITATION REVIEW
Assessor's Decision	STANDARD MET
Anniversary Date	10/10/2021
Assessment Dates	07/10/2019 – 08/10/2019
Lead Assessor's Name	RUTH REGAN
Customer ID	C18586
Assessment Reference	PN104569

2. ASSESSMENT OUTCOME

OVERALL OUTCOME	74% Good
1. Design	83% Good
2. Procure	80% Good
3. Contract	80% Good
4. Fund	73% Good
5. Develop	73% Good
6. Performance Manage	74% Good
7. Quality Assurance and Compliance	64% Satisfactory
8. Review and Close	60% Satisfactory

3. METHODOLOGY

Cumbria Chamber of Commerce (referred to as CCC/the Organisation throughout the rest of this report) continues to be mandated by the Department for Work and Pensions (DWP) to be accredited against the Merlin Standard as it continues to utilise a supply chain to deliver the New Enterprise Allowance (NEA) contract.

Whilst the only contract mandated for Merlin accreditation is NEA, due to a supply chain being used to deliver the European Regional Development Fund (ERDF) supported Business Start-Up Service (BSUS), Cumbria Business Growth Hub (Growth Hub) and Cumbria Local Enterprise Partnership (LEP) commissioned Cumbria Growth Catalyst (CAT), these contracts were included in the assessment.

The assessment team comprised of Ruth Regan (Lead Assessor) and Team Assessor, Lorna Bainbridge, who were supported by a coordinator from within CCC.

On receipt of a booking form in July 2019 along with a spreadsheet indicating a full list of all Supply Chain Partner organisations (past, present and potential) delivering 'end-to-end' provision and Advisors providing business advisory services to clients across a range of contracts, the Lead Assessor and coordinator started planning the assessment. All the logistics, timescales and the on-site evidence gathering dates were agreed.

In advance of the on-site evidence gathering, an on-line survey was carried out of the past, present and potential 'end-to-end' Supply Chain Partner organisations, with all 12 being invited to participate. Responses were received from four Supply Chain Partners, which represented 33% of the total. Survey results 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, and all documentation required for the assessment; Self-Assessment Questionnaire (SAQ), Pre-Assessment Notes (PAN) and interview schedule were provided in line with the agreed timescales.

The assessment team spent a total of 1.5 days each undertaking interviews with CCC staff involved in the strategic and day-to-day management of the supply chains, 100% of end-to-end Supply Chain Partners delivering the NEA, Growth Hub and CAT contracts, and 26% of the Advisors covering all four contracts. Documentary evidence was also reviewed.

The following report indicates the findings against key criteria within the Merlin Standard, which was evidenced within the supply chains stated above, as well as areas of strength and the primary areas to consider for development over the forthcoming two years.

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4. ABOUT THE ORGANISATION

The Organisation was established to represent, promote and protect the interests of industry and commerce in Cumbria. It is the pre-eminent independent business organisation in the county and works with partner organisations to ensure that the business community it seeks to serve receives quality services.

Its mission is *"to be a sustainable, financially strong organisation which is the membership organisation of choice for businesses seeking business opportunities, business services and representation."*

CCC manages a range of services to support businesses and the community. These include the range of contracts already highlighted together with, for example, the typical functions of a Chamber of Commerce; policy and representation, networking events, member services, export documentation service and more recently, information, advice and guidance relating to Brexit.

Since the Merlin accreditation review in 2017, the mix of delivery organisations across the contracts has developed to meet changing Commissioner requirements.

At the time of this assessment, 10% of the NEA contract was being delivered through a CCC internal delivery model, utilising contracted Advisors. The balance, (90%) continues to be contracted out to four Supply Chain Partners who are members of a well-established NEA supply chain providing end-to-end services and utilising a small number of second-tier Advisors.

In 2017 CCC was working with one Supply Chain Partner to deliver the BSUS contract, however, at the time of this assessment CCC was delivering 100% of the contract utilising contracted Advisors drawn on as needed depending on factors such as levels of demand, client needs and preferences, experience and specialisms.

CCC continues to deliver the majority (89.1%) of the Growth Hub utilising their pool of contracted Advisors to provide these services as part of its internal delivery. The remaining 10.9% is contracted to Lancaster University Management School (LUMS).

The Cumbria Growth Catalyst, is, unlike the other supply chains, still in its infancy with the three active Supply Chain Partners only just beginning to deliver their contracted outcomes successfully. CCC, who delivered 100% of the previous CAT contract is now fulfilling 72% with the remaining 28% shared across the three Supply Chain Partners.

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:

CCC has a clear understanding of the objectives and expectations of the different Commissioners', and there are strong links between these and the CCC mission and purpose. This understanding, together with an in-depth knowledge of the Cumbrian economy, infrastructure, business challenges, etc., has been instrumental in the design of their supply chains. The NEA supply chain continues to be made up of organisations and Advisors recognised as being 'fit for purpose', and able to give clients the best possible opportunities to achieve the programme outcomes. Supply Chain Partners confirmed that with the introduction of the most recent NEA contract extension, they were all engaged in reviewing if the incumbent supply chain organisations were still those best placed to deliver. The newly formed CAT supply chain includes a range of organisations that are different in size, sector and expertise. (1.1, 1.6)

Due to the supply chain design utilising the services of Chambers of Commerce and other well-established, business-focused organisations, clients have excellent access to additional support organisations and individuals providing technical, business and personal support services as well as access to grants and loans. The Advisors described how they endeavour to get to know each other's area of expertise and utilise this knowledge to signpost clients to those offering additional support as appropriate. (1.2, 1.4)

Supply Chain Partners are well versed in what performance expectations CCC has of them. All confirmed that these had been negotiated and agreed before being finalised within a contract. Advisors were also well versed in the performance expectations and outcomes of the BSUS, Growth Hub and NEA programme. (3.2)

The work completed by CCC on finance models relating to the NEA extension was acknowledged as being extremely valuable to Supply Chain Partners as it helped them make informed decisions about their abilities to fulfil the requirements of the contract while remaining viable. This group of Supply Chain Partners acknowledged the Organisation's 'open book' approach to sharing financial information as confirmation of the maturity of their supply chain relationships. (4.1)

Supply Chain Partners and Advisors gave strong testimony on the support CCC provides them to obtain additional funding/finance. Examples shared included; contributing to tenders by acting as a critical friend on reviewing the content of bids, taking a leading role in pulling existing members of the network together to discuss potential tender opportunities and encouraging Advisors to bid to deliver additional work available through other CCC projects. (5.2)

The improvement in communications over the last 12 months across, in particular, the NEA supply chain, was remarked upon by the relevant Supply Chain Partners. They were complimentary about the supportive nature of the CCC staff and the now established clarity about roles and responsibilities. (6.1)

Advisors and the majority of Supply Chain Partners confirmed that there is an open and honest culture across their supply chain - describing two-way communications where concerns and ideas are raised and discussed. Supply Chain Partner testimony about the opportunity to receive information from important stakeholders such the Cumbria LEP and having the chance to meet with the DWP Compliance Monitoring Officer and discuss their issues with them without constraint was very positive. (6.2)

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:

NEA Supply Chain Partners have, through their long-term working relationship, and by having similar ambitions in their provision of business support services, comparable core business principles and behaviours. These harmonised business principles and behaviours have embedded over the last 12 months through a significant improvement in the openness and transparency of communications across the supply chain. However, new Advisors and Supply Chain Partners do not always have an opportunity to discuss with CCC the principles, values and behaviours by which their relevant supply chain(s) are managed and governed. Inconsistency in how new Advisors and Supply Chain Partners are supported to understand what processes, practices and systems they needed to develop to deliver the contract were also apparent. The benefits of introducing a structured on-boarding process for all new Advisors and Supply Chain Partner organisations should be considered in which the appropriate values, principles and behaviours are presented and 'what they mean in practice' agreed. The on-boarding process could also provide new members of the supply chain(s) with clarity about, and training on, critical business processes required to fulfil the contractual obligations such as paperwork, management information (MI), how to use any relevant Customer Relationship Management (CRM) system etc. (1.5, 5.1)

Most Supply Chain Partners and Advisors were confident that the processes used to transfer funds/finances were efficient. However, a small number of examples were shared which highlighted there was potential for development in this area. For example, the paperwork required to accompany CAT invoices was not universally understood, and several Advisors had, and continue to have, challenges in meeting administrative requirements necessary to receive accurate and timely payment. Supply Chain Partners also highlighted that the payment of invoices could be delayed without any explanation being provided. Consideration should be given to how processes can be developed (from on-boarding and throughout the life of the contract) which provide relevant information, advice, guidance and training to Supply Chain Partners and Advisors on paperwork and administration requirements etc., and that reasons for delays in the processing and payment of invoices are communicated within an agreed timescale. (4.2)

A range of performance targets are in place relevant to the contracts delivered, and all Supply Chain Partners and Advisors understand them. However, inconsistencies were highlighted in processes used to review performance across not only the different contracts but across the Supply Chain Partners and Advisors within the individual supply chains. Consideration should be given to deciding how clear, two-way channels for regular, consistent, proportionate performance monitoring reviews can take place and how these methods can then be effectively communicated and understood by all. (6.3)

Members of the well-established supply chain's spoke of improvements made to the MI over recent years, and how this information was being utilised to support performance management. However, more recent members were less confident in their understanding of how and why MI is collected. As already highlighted, there is room for evaluating how effectively new Supply Chain Partners and Advisors are on-boarded, and consideration could be given to ensuring that a detailed explanation of how the MI systems used by CCC can be utilised to best effect is built into this on-boarding process. (6.4)

An annual Self-Assessment Report (SAR) covering the NEA supply chain is created, and a subsequent Quality Improvement Plan (QIP) utilised. However, this activity does not include other supply chains. Consideration could be given to the benefits to be gained by completing a SAR and QIP for each supply chain and using them to create an overarching organisational supply chain SAR and QIP. This approach will enable best practice identified within each supply chain to be shared and where improvements are required judgements can be made on how best to introduce them to the benefit of all supply chains. (6.7)

In the main, quality and compliance is monitored through CCC sampling the outputs and outcomes of activities undertaken, including, for example, workshop feedback forms, file checks, review of client business plans and records etc. While acknowledging that the majority the Supply Chain Partners and Advisors are well-established members of their respective supply chain, CCC may wish to consider providing regular feedback on the overall quality of the outputs and outcomes of their work and extending this 'remote' approach to compliance monitoring to quality assuring the actual delivery of the service, the information, advice and guidance provided and the customer experience. Introducing observations of practice could be one approach to achieve this. The findings of the quality assurance activities could then be shared across the supply chain(s) and used openly and effectively to improve the service delivered to clients. (7.2, 7.3)

Although Supply Chain Partners and Advisors gave examples of the wider impact of their services - these were anecdotal, and they were unable to confirm any overall measurable effect. While case studies have been produced, further consideration could be given to how data can be collected and shared which demonstrates the measurable impact the supply chain(s) have on the wider social objectives of the Commissioner. (8.2, 8.3)

Those who had left the supply chain were very positive about the exit strategy and approach of CCC. However, it may be beneficial to start more extensive discussions with present members of the supply chain(s) on how the end of any contract will be managed and creating a checklist or similar to ensure consistency. Discussing and agreeing to this strategy well before any contract wind down will allow all Supply Chain Partners and Advisors to plan their wind down/closure procedures and ensure clients receive all the support they need/are entitled to during this time. (8.5)

7. 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>CCC gains a clear understanding of the aims and objectives of any Commissioner to ensure they are reflective of their mission and ambitions, and that it is a viable and deliverable contract which will add value to the communities they support. This was evidenced by, for example, the detailed consideration given to the NEA 2017 tender where CCC worked with their existing NEA Supply Chain Partners to carefully consider the changed requirements of the Commissioner. As new contracts come forward, CCC invites organisations identified as having the potential to contribute to the contract requirements to meetings to consider the potential delivery model and to gauge their interest in joining any possible supply chain. CCC acknowledges that this engagement with potential Supply Chain Partners before any submission as critical to any successful bid and subsequent contracting.</p>
<p>Three of the four Supply Chain Partners delivering the NEA contract are Chambers of Commerce; the fourth is a private limited company that has been successfully providing business support services for several years. Consequently, all organisations engaged as end-to-end NEA Supply Chain Partners have the complementary skills, ambitions and experience needed to deliver the requirements of the Commissioner. This supply chain is very well established, and all its members believe it remains 'fit for purpose'. The mix of organisations within the CAT supply chain includes a company limited by guarantee, a not for profit and a private limited company. The one end-to-end Supply Chain Partner engaged in the Growth Hub is LUMS which has a long-term working relationship with CCC. The Advisors providing the generalist business support and specialist services, such as marketing, social media, financial planning are self-employed or are an owner/employee of a private limited company.</p>
<p>A review of the makeup of the different supply chains takes place in line with the contract cycle or when requirements change. CCC also has contingency arrangements in place should any Supply Chain Partner leave the supply chain mid-contract. The previous Cumbria Growth Catalyst contract was delivered in-house by CCC using subcontracted Advisors, but when the specification for the current contract was issued, CCC decided that it would be more appropriate to look for a supply chain to extend the access to potential clients. Consequently, a range of potential delivery partners organisations were identified and engaged. Supply Chain Partner and Advisor testimony comments included:</p> <p><i>"...the supply chain is a mix of experienced delivery partners."</i></p> <p><i>"...the range of Advisors in the network means the client gets the best chance to succeed."</i></p> <p><i>"...range of organisations in the supply chain is relevant because we know we all can deliver and have a good track record."</i></p> <p><i>"...we are currently – delivering what the contract requires so no need for change."</i></p>

While there have been no cases of TUPE transfer (Transfer of Undertakings Protection of Employment Regulations 2006), CCC has a strategy and process in place which will, if necessary be supported by the Chamber HR/legal helpline.

At the outset, expectations for around NEA and Growth Hub performance expectations were discussed and agreed. Service levels and codes of conduct defined by DWP were also shared with NEA Supply Chain Partners. These expectations were then confirmed in contracts as well as associated Service Level Agreements. The expectations and responsibilities of Advisors were detailed in the Invitation to Tender and their subsequent Service Level Agreements. A further definition of the targets and indicators is also provided within an Advisor Handbook. Performance expectations continue to be discussed and reinforced by ongoing information sharing, Supply Chain Partner and Advisor meetings. While members of the CAT supply chain had, pre-contract, a clear understanding of overall outcomes required, there were challenges early in the delivery of the contract in gaining clarity regarding certain aspects of performance expectations of the Commissioner. Supply Chain Partner and Advisor testimony comments included:

"...the brief was to challenge thinking on new products and service to the market."

"...outcomes are made very clear."

"...expectations are crystal clear now."

"...very clear performance targets now in place."

"...we have targets linked to business starts, jobs – all negotiated and agreed pre-contract."

"...greatly improved in the area - excellent now."

"...we are very clear what our targets are."

The majority of the Supply Chain Partners confirmed that the funding and payment terms were fair and proportionate and did not cause any undue financial risk. NEA Supply Chain Partners described the financial modelling undertaken by CCC as being vital to their decision to remain as part of this supply chain. CCC is perceived as being open and transparent in financial matters. Advisors explained how payment is based on what they do (hours) – with a percentage being held back pending clients achieving particular stages. All confirmed this payment structure was fair and had been clearly articulated before contract and then set out in Service Level Agreement/contracts. Supply Chain Partner and Advisor testimony comments included:

"...we are doing financial modelling all the time."

"...it is a viable contract – it ensures we are present in the market place and seen along with the competitors."

"...we had a very frank discussion about fees with the extension and what we could realistically deliver and the lowest costs we could accept."

"...what we get paid is fair and there is no undue financial risk to me as an Advisor."

DO

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

As highlighted in Section 6: Areas for Development, there are inconsistencies in how Supply Chain Partners and Advisors are, at the start of their contract, supported to understand what processes, practices and systems they needed to develop to deliver the contract. For example, the opportunities for the members of the newly formed CAT supply chain to meet post-contract, have been minimal. Consequently, they have had limited opportunities to discuss, as a supply chain, how best they can deliver the contract. Representatives from the more established supply chains gave examples of being engaged in one-to-one meetings with CCC staff and Advisor and Supply Chain Partner meetings during which there are opportunities to review current performance and share best practice ideas. CCC has actively sought opportunities for members of their NEA, Growth Hub supply chains and Advisors to meet with people and organisations of interest who can provide specialist and additional support. For example, the DWP Compliance Monitoring Officer was invited to attend an NEA Supply Chain Partner meeting to explain their role, and 'what evidence looks like' from a compliance perspective. Supply Chain Partner testimony comments included:

"...as this was the first time of delivering a project of this nature, we would have appreciated additional support and detail."

"...Following the DWP Compliance Officer attending the Partner meeting, we have worked with them on a one-to-one basis. This has helped us understand what we need to show to enable payment to be made – the CRM needs to show everything a physical file would – this insight has been invaluable to us."

Supply Chain Partners and Advisors described communication from and to CCC as being open and honest and two-way where opinions can be openly shared and discussed and where required, appropriate solutions reached. Supply Chain Partner testimony from those delivering the NEA and Growth Hub contracts, about the opportunity to engage with key stakeholders such as DWP and the Cumbria LEP was very positive. CCC seeks to actively engage Supply Chain Partners in external reviews such as Merlin, but also DWP Provider Assurance Team (PAT) audits. They will also hold their contract performance review meetings with DWP at Supply Chain Partner premises, enabling them to engage directly with DWP. Supply Chain Partner and Advisor testimony comments included:

"...the contract is delivered in a supportive environment."

"...CCC is very supportive – we received a referral for a client with learning difficulties which we were unsure how to deliver, and they immediately took care of it."

"...I received a complaint – valid one, called X and she took it on board straight away, it was my fault, but there were no issues."

"...very good relationship from CEO through to operational."

"...good working relationship with the University."

"...contract lead for DWP regularly attends our meeting also district office will attend."

"...Advisors ask each other for support and guidance if they need help."

"...really improved – better relationship – working better – no longer on the back foot – we get to know what we need, and I don't have any qualms about asking 'what do you mean by that'."

Weekly, monthly and quarterly performance targets are set relevant to the contract, and these are reported on within the agreed timescales. However, as highlighted in Section 6: Areas for Development above, there are inconsistencies and anomalies in the processes used by CCC to review performance. For some, performance monitoring takes place through the submission of timely and accurately completed paperwork, with minimal support or conversation, others in the same supply chain meet with CCC every couple of months to review and discuss performance, share concerns, and agree on ways forward. All Supply Chain Partners and Advisors confirmed that they would, if necessary, ask to meet with CCC at any time to discuss performance and that they would get a positive response. Supply Chain Partner and Advisor testimony comments included:

"...phone call asking how we are doing against targets this quarter and do you need any help."

"...weekly reports on NEA – very detailed and tight."

"...I will come into the Chamber and go through my client list."

"... we were all on a PIP which detailed line by line what they needed to improve upon. CCC did provide support in terms of clarity about what they needed."

"...not aware of any performance management monitoring processes as yet."

NEA and Growth Hub Supply Chain Partners and Advisors understand the rationale behind the MI systems used by CCC. They spoke of improvements made to the MI over recent years, and that they believe that in the main they have access to current and accurate data, which supports them to deliver their contracts. NEA Supply Chain Partners also receive the detailed MI provided by DWP as a comparison to their own. However, CAT Supply Chain Partners were less confident and consistent in their abilities to explain how they can best utilise the MI they are being asked to provide. Supply Chain Partner and Advisor testimony comments included:

"... CRM is used to sort all the information – client details, etc. Report electronically weekly, monthly used for the claim."

"...we still give information on excel spreadsheets but that works ok."

"...there are reports for everything!"

"...we provide them with reports but not aware of any that we can pull from the CRM."

As already highlighted in Section 6: Areas for Development, quality and compliance is monitored in the main through CCC sampling documentation produced following client interventions, rather than the actual client experience. This approach has been used to ensure consistency across these outputs such as business plans, customer feedback forms, etc., and this has led to a significantly reduced percentage of validation checks needing to take place, as well as the Compliance Monitoring Officer score increasing from 81.2% to 95.1%. Feedback is given when the compliance checks highlight some administration error or business plans requiring further work, resulting in Supply Chain Partners and Advisors taking a 'no news is good news' view of the quality assurance process. Supply Chain Partner and Advisor testimony comments included:

"...the quality of the business plan is checked to ensure it meets the minimum requirements."

"...it's based on the strength of the document produced for the client and them being of high quality; the report following the diagnostic and at the end of the 12hours indicates the level of service provided."

"...spot checks done on business plans and if there are any issues, these will be raised by CCC. Also, they do spot checks on information put on the CRM."

REVIEW

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

CCC and members of their supply chains were able to share some examples of how their work is having a positive impact on the wider social objectives of the Commissioners and other stakeholders. In general terms these include; unemployment reduction, enabling clients to move off benefits, linking clients into, and encouraging them to take up, training and development (including qualifications), creating and safeguarding jobs, supporting businesses to create higher value, better paid jobs, improving business sustainability, and more recently providing information, advice and guidance in preparation for Brexit. Case studies have been developed and published to highlight some of these achievements.

Examples shared directly by Supply Chain Partners include:

"...moved long term unemployed to being employed, resulting in a reduction in the unemployed in the region."

"...work in a deprived area with very little enterprise, and this has developed an entrepreneurial element."

"...attracts job seekers and those on universal credit and contributes to reducing employment and the reduction to the benefits bill – it is tenuous to look at any wider impact."

Similarly, examples which demonstrate how clients, employees etc., have, through the work of the supply chain, been encouraged to develop themselves and their wellbeing in the broadest sense were again shared by CCC and members of their supply chain. Through summative assessments, clients and their employees are supported to enhance their living standards, wealth, health and wellbeing, self-esteem, which leads to an increase in motivation and confidence, reducing social exclusion. Just one specific example of those shared included how established processes used to review client circumstances and needs identified a client with mental health challenges resulting in them being allocated an Advisor with relevant counselling experience and qualifications. This tailored support led to the client achieving their desired outcome without impeding their mental health.

Supply Chain Partner and Advisor testimony comments included:

"...certainly, impacts on individual's lives."

"...the impact on the Advisors is job satisfaction a lot of the time."

"...it provides cradle to grave suite of services to local people."

"...clients find the service invaluable, it's free, tailored to their needs to enable them to develop their business further."

"...provides individuals with access to tailored support to help their business."

"...staff really enjoy delivering the service."

"...Advisors are life coaches as well as business partners for the clients due to the barriers faced."

"...we support people for 12 months – offer ongoing support on how they are progressing – we get to support the person not just the business."

"...we have evidence of those who don't go forward with self-employment become more confident and determined to gain employment by the support they receive."

"...I love my job - becoming an Advisor is the best move I've made!"

8. CONCLUSION AND CONDITIONS OF ACCREDITATION

In conclusion, CCC has retained accreditation against the Merlin Standard. The Senior Management 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 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: (merlin@assessmentservices.com)
- 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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