



merlin standard

EDUCATION DEVELOPMENT TRUST

COMPACT REPORT

CONTENTS

1.	KEY INFORMATION.....	3
2.	ASSESSMENT OUTCOME	3
3.	METHODOLOGY	4
4.	ABOUT THE ORGANISATION.....	5
5.	AREAS OF SIGNIFICANT STRENGTH.....	6
6.	AREAS FOR DEVELOPMENT	8
7.	FINDINGS	9
8.	CONCLUSION AND CONDITIONS OF ACCREDITATION	12

1. KEY INFORMATION

Assessment Type	ACCREDITATION REVIEW
Assessor's Decision	STANDARD MET
Anniversary Date	08/06/2022
Assessment Dates	18/08/2020 & 20/08/2020
Lead Assessor's Name	SUSAN SMITH
Customer ID	C23235
Assessment Reference	PN104858

2. ASSESSMENT OUTCOME

OVERALL OUTCOME	86% EXCELLENT
1. Design	83% GOOD
2. Procure	95% EXCELLENT
3. Contract	90% EXCELLENT
4. Funding	80% GOOD
5. Develop	93% EXCELLENT
6. Performance Manage	80% GOOD
7. Quality Assurance and Compliance	84% GOOD
8. Review and Close	80% GOOD

3. METHODOLOGY

Education Development Trust (referred to as EDT or the Organisation throughout the report) voluntarily opted to be re-assessed against the Merlin Standard. The purpose of the re-assessment was to gain objective feedback from a third party regarding their supply chain management practices; to clearly understand what is working well and establish areas for development / improvement.

Whilst EDT deliver a range of contracts on behalf of different commissioners, at the time of the assessment the National Careers Service was the only contract to be delivered in conjunction with a supply chain.

The assessment team comprised of Susan Smith (Lead Assessor) and Lorna Bainbridge (Team Assessor) supported by a coordinator from within Twin. The Lead Assessor started to work with the coordinator in March 2020 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 spreadsheet indicating a full list of Supply Chain Partners delivering an end-to-end service.

In light of the Covid-19 lockdown, it was agreed that the Supply Chain Partner survey would not be conducted.

The Lead Assessor was in regular contact with the coordinator before the evidence gathering activity to review the schedule and logistics. All documentation required for the assessment was shared to enable the reaccreditation review to take place as planned.

The assessment team spent a total of two days each undertaking interviews with EDT staff involved in the strategic and day-to-day management of the supply chains and 50% of the 13 present Supply Chain Partners were interviewed in line with the published Merlin scoping framework for assessments taking place during Covid-19.

The following report provides an indication of the findings against key 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

EDT is a non for profit, registered charity with a clear purpose of '*Transforming Lives by Improving Education around the World*'. This is underpinned by its values; excellence, integrity, accountability and collaboration.

The Organisation started as the Centre for British Teachers (CfBT) in 1968 with the objective of helping teachers working abroad. Over the years, whilst remaining within the education sector it has evolved and provides a range of services on an international level. In order to contribute to the purpose EDT work collaboratively with national and local Governments world-wide, schools and other partners to ensure that the education services are the best they can be, with a focus on designing and delivering sustainable solutions to improve education. The Organisation currently works with Government departments across Europe, United Arab Emirates, Brunei and Africa to mention a few, sharing their knowledge, specialist education expertise and project management experience to complex global problems.

EDT also offers specialist educational consultancy and works directly with schools and other establishments to contribute to their overarching vision and purpose. Since 2004 EDT have been delivering the National Careers Service to bridge the gap between education, training and employment. Currently, the service is commissioned by the Education and Skills Funding Agency (ESFA), and EDT is a Prime provider in two regions; North-East and Cumbria (including Northumberland, County Durham, Tyne and Wear and Tees Valley), as well as Yorkshire and the Humber. It provides careers advice and guidance to more than 100,000 adults annually in a diverse range of community and community settings.

The service is provided through the use of a direct delivery model and a supply chain in both regions in order to meet the commissioner expectations in terms of targeting the Priority Groups (PGs) and meeting the diverse needs of the customers. Whilst EDT has knowledge and expertise in the provision of Careers Education, Information, Advice and Guidance (CEIAG) it recognised the value of working with others to support and work with the specific groups of customers. The aim being to transform lives and provide lasting economic and social benefit to the communities in which they operate. Currently, Supply Chain Partners deliver 17.3% of the National Careers Service contract.

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:

EDT have been a Prime provider of the National Careers Service for an extended period of time, and as a result, when the commissioner re-procures the service the Organisation prepares and submits a bid to meet the requirements of the commissioner. It undertakes extensive research using a range of methods, for example, scrutiny of a wide range of statistical information including the Office for National Statistics (ONS) data, establishing the Local Enterprise Partnerships (LEPs) and Local Authorities (LAs) priorities, as well as gaining a comprehensive understanding of the demographics and indicative numbers. Supply Chain Partners are in the public, private and charitable / voluntary sectors. The current supply chain is made up of organisations from the different sectors; 61% - 3rd sector, 7% - Public and 30% - Private. In addition, it was noted that Supply Chain Partners are of differing legal status and varying sizes, as well as some having expertise / specialism to engage with different groups and address a range of customer needs. (1.1)

There is a clear procurement process that many Supply Chain Partners describe as being simple and effective. Communications are clear and transparent throughout and more recent Supply Chain Partners spoke highly of the collaborative communications during procurement. Due diligence activities are fair and proportionate with Supply Chain Partners reporting being supported to become part of the supply chain. Comments included *"It was very thorough and transparent"*; *"They are extremely thorough"*; *"They made us do things which actually helped us"*; *"It was fair"*; and *"A completely transparent process. It's all about integrity"*. (2.1)

A comprehensive strategy is in place to undertake the Transfer of Undertakings Protection of Employment (TUPE) for those transferring in or out of EDT. The approach taken to any TUPE activity is to ensure a smooth transition for the employee. Consultation and communication is viewed as paramount to support employees at a difficult time, and as a result EDT ensures support is readily available for individuals, including the provision of information, advice and guidance in a timely manner. TUPE transferees consistently confirmed the support available from EDT and the fact that it was an easy transition. (2.2)

Performance expectations and funding / finance arrangements are openly discussed prior to contract award, which results in potential Supply Chain Partners having a clear understanding of key contractual components. Supply Chain Partners are encouraged to submit their *'desired'* volumes within the Expression of Interest (EOI) and these are subsequently negotiated prior to contracting. Supply Chain Partners confirmed that there was an open, honest and transparent approach to negotiating volumes, funding / finance and performance expectations prior to signing the contract. (2.4)

Performance expectations were discussed prior the submission of the EOI as described above and explicitly outlined within the contractual documentation at the start of the relationship. Throughout the life of the contract there is a focus on performance; informally on a daily and weekly basis, and formally throughout the quarterly performance

management review. Consequently, Supply Chain Partners clearly understood what was expected of them and felt well supported by EDT. (3.2)

Payments are consistently made accurately and on time. There was uniformly positive responses from Supply Chain Partners about this being a strength of EDT. The fact that remittance advice was clear and transparent helped Supply Chain Partners to know what had been paid for each customer outcome. (4.2)

EDT actively supports, develops and encourages its Supply Chain Partners to fulfil their contractual obligations from contract award and throughout the life of the contract. This starts through the sharing of policies and procedures to enable Supply Chain Partners to devise such documentation to meet the contractual requirements. An extensive on-boarding activity is provided prior to mobilising each new contract. This provides staff with specific information relating to the contract, for example, key performance indicators (KPIs) and milestones, the customer journey/delivery model, paperwork, compliance requirements through to reporting functions. Throughout the life of the contract further support is provided, for example, learning and development activities, as well as advice and guidance to ensure delivery of services under unprecedented circumstances, for example Covid-19. Supply Chain Partner comments included *"Training needs are identified throughout the observations, like promoting Apprenticeships"*; *"Training opportunities recently has included 'telephone delivery experience', all the providers were on the call and we could share best practice"*; *"This is much improved, they always 'have an arm around you'"*; and *"They share the CPD Calendar and we have access to the Inspiration Portal which has resources available."* (5.1 / 5.3)

The EDT Supply Chain Manager is the first point of contact for Supply Chain Partners and there is strong and consistent testimony from Supply Chain Partners about their effectiveness. The culture of communications is cited by Supply Chain Partners as matching EDT's values. Personal interactions between staff and the clear majority of Supply Chain Partners is consistently positive and supportive. Information, advice and guidance to both Supply Chain Partners from EDT and to customers from the supply chain is well managed and effective. (6.1 / 6.2 / 7.3)

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:

There is variation in Supply Chain Partner understanding of the management fee and consequently few can realistically judge whether they receive value for money as a result. It is clear to Supply Chain Partners what they receive for the management fee in terms of services. However, consideration could be given to taking a more menu driven, or compliance risk based approach to tailor supply chain management functions to the needs of individual Supply Chain Patterns. (4.3)

Whilst a robust approach to performance management is in place that provides the opportunity to discuss issues and challenges, more could be done to share innovation and what is working well. (6.3)

The Self-Assessment Reports (SAR) and Quality Improvement Plans (QIP) produced by Supply Chain Partners clearly feed into the overall EDT SAR and QIP. There was less clarity from Supply Chain Partners about recalling having seen the EDT SAR and QIP and what this meant for overall delivery performance and quality. It is suggested that the sharing of the overarching SAR and QIP might be undertaken in a more meaningful way that engages Supply Chain Partners more fully. (6.7)

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>Supply chain design is a strength – please see Section 5 of this report.</p> <p>EDT actively reviews its supply chain to better meet needs of customers. It has approached potential Supply Chain Partners where there is an identified gap in delivery either geographically or from analysis of demographic data. For example, to expand the reach of Black and Minority Ethnic customers accessing the National Careers Service, EDT added a specialist Supply Chain Partner as part of the supply chain. Although this is no longer a specific contractual Priority Group for the National Careers Service contract, this ensures the widest possible demographic customer base is reached as the Supply Chain Partner specialises in supporting BME/ESOL learners into learning and work and is based geographically in the heart of the BME community in Newcastle. Another example in Yorkshire and Humber is a Supply Chain Partner that predominantly works with customers who have a caring responsibility. By having a diverse supply chain, this enables EDT to ensure the service is accessible to all.</p> <p>TUPE is a strength – please see Section 5 of this report.</p> <p>As highlighted in the Strengths section of this report, Supply Chain Partners spoke positively about being able to discuss and agree profiles and have a clear understanding of performance expectations at all stages of the relationship. Some Supply Chain Partners noted that they had successfully negotiated a higher contract value due to their performance.</p> <p>The funding and payment arrangements were openly discussed with Supply Chain Partners prior to completing and submitting the Expression of Interest and subsequently further discussions took place throughout the formal contracting stage. Supply Chain Partner comments included:</p> <p><i>“They expressed concern and showed they cared about us by discussing the payment profile.”</i></p> <p><i>“They respected our need to be an autonomous stand-alone business and financial talks were geared to this”</i></p> <p><i>“EDT did a sense check to see if we were financially viable.”</i></p>

DO

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

Supply Chain Partners development is important to EDT and this is a Strength. The support for the achievement of Cyber Essentials Plus was particularly well received by Supply Chain Partners. EDT also supplies a range of resources these include access to its bespoke Labour Market Information (LMI) with the ability to request LMI factsheets, resources, or data specific and unique to their customer groups. There is also a range of resources readily available on the Inspiration Portal.

Based on its values, EDT has aimed to create effective relationships, built on openness and transparency. Underpinning this are a number of policies which have helped to create and embed an open and honest culture. Supply Chain Partners comments included:

"Open and honest- she {Supply Chain Manager} would come in every day if necessary"

"It was a very honest conversation"

"It might be communications overload, but this is better than none at all"

"It always feels very mutual"

"Very good, there is always an open dialogue"

A robust approach to performance management has been designed, which typically includes regular contact with the Supply Chain Manager. In addition, quarterly performance reviews are executed. Prior to Covid-19 these were face-to-face, but currently undertaken remotely. Supply Chain Partners believe these activities are proportionate to the contract and provide the opportunity to discuss issues and challenges, although more could be done to share innovation and what is working well.

As part of its continuous improvement strategy, EDT implements a range of range of quality assurance and improvement processes: to include Customer Skills Action Plan (CSAP) quality checks, Observations, Customer journey checks and Customer feedback which enables strengths and identify areas for development to be captured. A high proportion of Sub-Contractors confirmed that whilst there were numerous interventions, these were proportionate and contributed to mitigating any risk attached to running a Government contract. Action is taken as a result of quality assurance action. For example, a customer satisfaction survey is sent monthly after the interaction and includes 10 questions to meet the ESFA KPIs, and an additional four to gain specific information. In the past for one Supply Chain Partner, this highlighted that only 65% of customers were in receipt of an action plan, as a result, this was reviewed with the Supply Chain Partner and action taken as a result. In addition, customers are provided with the opportunity to use free narrative and add comments, and this had identified issues/concerns with a specific Advisor.

REVIEW

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

EDT continues to assess the activities of the supply chain in terms of having a measurable impact on the wider social objectives, for example, the Fuller Working Life Agenda, Industrial Strategy, Worklessness, etc. and every effort is made to communicate this information to Supply Chain Partners. In addition, some Supply Chain Partners actively assess themselves in terms of the impact specific contracts have on the wider objectives, for example, reduced unemployment, less reliance on Government benefits, less referrals to medical services, etc.

In terms of the positive impact on customers examples were cited which included; improved confidence, better health and wellbeing, increased independence, changes to the lives of family members and breaking down the barriers and stigma attached to being employed (after generations of a family have been unemployed). In addition, some referenced the opportunity that customers gained to realise the barriers to employment and as a result gain a bespoke service to move them closer to the labour market. Supply Chain Partner comments included:

"EDT show an interest in our clients and what we're doing, we've delivered 60 – 65 tons of food throughout Covid-19 and X has asked how she can help."

"Clients in the area certainly benefit from having this service, it is such a deprived area, we had 15 referrals the other day."

"We follow the clients through their journey, every step of the way until they get to where they want to be."

Over the life of the contract delivery staff had experienced extensive support through mentoring and coaching, as well as learning and development opportunities to gain additional knowledge and skills, and in some cases higher level qualifications. The contract had provided stable employment for careers advisors. In terms of the impact on the commissioner reference was consistently made to the achievement of the targets, especially the number of customers that had entered into employment, education and / or training.

8. CONCLUSION AND CONDITIONS OF ACCREDITATION

In conclusion, this assessment provided the opportunity to review the practices of Education Development Trust for the current National Careers Service contract against the Merlin Standard. As a result, the Organisation will be accredited with the Standard for a period of two-years. 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.

Holders of the Merlin Standard Accreditation must:

- Maintain and continually improve upon their approach to Supply Chain Management.
- Cooperate with annual Reviews as required by Assessment Services Ltd
- Inform Assessment Services Ltd (merlin@assessmentsservices.com) or their Lead Assessor if the key contact name or contact details change.
- Inform Assessment Services Ltd of any significant changes made to the organisational structure, senior management or systems that may impact on their accreditation; email: (merlin@assessmentsservices.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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