



THE NATIONAL ARCHIVES

DEVELOPMENT OF TRAINING RESOURCES FOR DIGITAL PRESERVATION IN THE ARCHIVE SECTOR: MODULES ON ACCESS TO DIGITAL ARCHIVES

INVITATION TO TENDER – OPEN COMPETITION

DEADLINE FOR TENDER SUBMISSIONS – 12 NOON (UK TIME), 14 DECEMBER 2020

1 BACKGROUND

- 1.1 The National Archives (TNA) is the official archive of the UK government and for England and Wales, making available to the public a vast collection of historical records dating back over 1,000 years. TNA is also an Independent Research Organisation (IRO) and research is at the heart of what we do, both to address the challenges and opportunities of digital, but also to research into the intellectual and material content of our historical records in order to enhance access to our collections. More information on TNA can be found at www.nationalarchives.gov.uk.
- 1.2 The Archive Sector Development department (ASD) is responsible for leadership of the archive sector in England, comprising over 2500 archives. Our work is framed by the new strategic vision, Archives Unlocked. Our approach to the leadership role is a collaborative one, supporting partnership working to encourage a sustainable and innovative archive sector <http://www.nationalarchives.gov.uk/archives-sector/projects-and-programmes/strategic-vision-for-archives/>
- 1.3 As part of this leadership role, Archive Sector Development is delivering a multi-year digital capacity building plan for archives in England: Plugged In, Powered Up. This comprises multiple strands of training, advocacy and resources to create step-change in the archive sector's capacity to manage records created and preserved in digital formats: <https://www.nationalarchives.gov.uk/archives-sector/projects-and-programmes/plugged-in-powered-up/>.

2 THE PROJECT

2.1 The National Archives and the Digital Preservation Coalition have created an online learning resource, [‘Novice to Know-How’](#) which guides novice learners in digital preservation for archives. This learning resource is funded by The National Archives under its digital capacity building strategy [‘Plugged In, Powered Up’](#). The existing ‘Novice to Know-How’ resources cover a wide range of digital preservation activity, but do not cover access to records which were created in digital format and captured. These are referred to below as the Novice to Know-How Preservation pathway. We now seek to create Novice to Know-How Access modules which complement the learning experience for preservation and ensure archive services are able to build their capacity to deliver access to digital records, the ultimate reason for their preservation.

2.2 We are seeking a supplier to deliver the following:

- **Draft training modules with supporting materials for novice practitioners to develop practical skills in providing access to born-digital records.**

Evidence of sector skills and capacity (JISC/TNA survey 2018) shows that although awareness of the need to preserve and provide access to born-digital materials is high, many practitioners struggle to provide access to digital records. This is an area where there are limited widely-used tools or standards, and where practice continues to develop. Known issues in the access area include identifying and managing sensitive or otherwise restricted records access; discovery metadata suitable to born-digital records; the provision of access copies separate from preservation masters; and options for delivering an accessible, effective user interface which allows users to engage with digital content and its possibilities. The sector needs practical reference tools to support them moving from a close focus on capture/preservation of born-digital records into proactively providing access to these digital records and data.

- **Create a logical flow of training and supporting materials, designed to improve skills at novice practitioner level.**

Ensure that there is a skills-building approach so that practitioners can easily understand their increasing capacity to manage and provide access to digital records. Although skills development is the key goal, the learning should also explicitly build practitioner confidence. It should present digital access as a process, not simply as a system, and emphasise that any systems which are in use must be managed and connected to other elements of digital records preservation and IT support. In designing the modules, it would be useful for practitioners to be able to drop-in on support for understanding specific tools, as well as following the full learning experience.

- **Offer a range of learning experiences, probably including video/audio tutorials, exercises, quick reference checklists and tips.**

The experience of providing guidance to the archives sector in this area shows that flat text reference materials are well provided, and under-used, while the interactive Novice to Know-How Preservation pathway has been highly successful. Novice to Know-How Access modules should therefore aim to provide an interactive learning offer, with a range of ways to learn. Users should have opportunities to validate their learning, perhaps through activities, quizzes or other ways to demonstrate visually that they have progressed.

- **Engage with related work-streams and projects in the Digital Capacity Building Programme to present a coherent approach.**

These work-streams and projects are specified in 'Use of the work' (section 2.4).

- 2.3 **Learning objectives:** Access is the ultimate aim of capturing and preserving digital records and data. Participants who take the Novice to Know-How Access modules will:
- Understand the core principles of digital access and how these can be practically applied
 - Have hands-on experience and confidence to relevant strategies and tools to provide access to born-digital content, which address issues from sensitivity to different types of digital content and user need.
 - Be able to work through a process from identifying and managing restrictions on access through discovery metadata to disseminating born-digital content in accessible formats.
 - Be able to apply the knowledge gained practically in their own place of work
- 2.4 **Use of the work:** The Novice to Know-How Access modules will be an online resource promoted across the archives sector in England. As one of several work-streams in the Digital Capacity Building Programme they will:
- Dovetail with and to an extent parallel the intensive group teaching experience provided to novice practitioners through 'Archive School' (composed of 5 modules of which the relevant ones for this tender are metadata and extraction tools, and access). Tools demonstrated include creating an HTML page from a directory tree (such as FileListCreator, SnaptoHTML) and using Excel to manipulate DROID outputs, to include URLs for incorporating into a catalogue upload (for example into The National Archives Discovery Manage Your Collections)
 - Dovetail with and to an extent parallel the Workflows stream, which has provided a workflow for access to digital archives and identifies a range of relevant tools.
 - Dovetail with and provide a comparable learning experience to the Novice to Know-How Preservation pathway: <https://www.dpconline.org/digipres/train-your-staff/n2kh-online-training>
 - Be promoted by TNA for wider archives sector skills development – it must be openly accessible for sector benefit and provided in a transferrable online-ready format which complies with SCORM <https://scorm.com/>.
- 2.5 The work must be completed by 31 March 2021.
- 2.6 The maximum available budget for this project is £30,000, excluding VAT but including all other expenses.

3 METHODOLOGY AND DELIVERABLES

- 3.1 We believe the methodology for delivering this requirement should include gap analysis, module drafting and resource creation, including:
- Background research to identify existing tools and supporting documentation, and to understand how far these meet archive sector workforce needs (including DLF Levels of Born-Digital Access, DPC, JISC and Bridging the Digital Gap training content as well as other Plugged In, Powered Up content)
 - Create a set of modules for skills development from novice to intermediate skill status for access to born-digital records and data, with suggested learning content
 - Test a small number of learning resources with DALE members and/or Bridging the Digital Gap trainees to ensure they are at a suitable level to support sector skills.
 - Create the full suite of new learning resources on digital access in a style and at a level which directly engages with the needs of the archives sector workforce.
 - Provide learning resources in SCORM-compatible format for ingest into a suitable learning management system.
- 3.2 As the timescale is restricted and as access to born-digital archives is a new and developing area, with relatively few commonly-agreed standards and approaches, we would welcome responses which explicitly engage multiple skillsets and experiences with digital archives to create a quality product within the time available.
- 3.3 The Digital Archives Learning Exchange (DALE) can provide a forum for some of the sector capacity understanding, and act as a sounding board to ensure the final product delivers something tangible for the sector. Bridging the Digital Gap trainees, who have technical skills on appointment, may be a forum for testing tools and provide feedback at a more technically skilled level. The National Archives lead can put the appointed supplier in touch with relevant contacts.
- 3.4 The outcomes to be delivered by this requirement are to encompass providing access to born-digital archives as a practical, implemented skillset:
- Training and supporting materials which cover implementing the range of core activities for digital access in a logical structure, perhaps using Digital Preservation Workflows: Access as a model (<https://www.nationalarchives.gov.uk/archives-sector/projects-and-programmes/plugged-in-powered-up/digital-preservation-workflows/4-access/>). The aim should be to integrate support and use of tools such as those identified in the Access Workflow, into this structure, to bring the processes to life. Another option may be to use structures in the DLF Levels of Born-Digital Access, including its emphasis on accessibility for different user needs.
 - A wider sense of how these practical activities fit into institutional implementation, such as connecting to digital preservation activities, institutional policies on access and handbooks, may be woven in and learners may be directed to resources on these areas. There may also be references to the wider standards landscape to help learners to understand how their activity supports overall institutional progress. These elements should be presented as contextual, rather than the core aspects of Novice to Know-How Access learning.

- The work may also air the question of how much of this activity sits with archivists and how much can/should become part of ICT delivery. This will vary by organisation and level of support, but could usefully build archives' confidence in what they can seek external support with.
- Supporting materials will include some newly-created content, but should also incorporate existing resources where these already provide practical learning which meets sector needs.

5 HOW TO RESPOND

- 5.1 It is for you to determine what format your Tender Response should take so as to describe your offer in a clear, comprehensive fashion. However please ensure your Tender Response addresses **as a minimum**:
 - 5.1.1 Your **experience** in meeting similar requirements, particularly in the archive or heritage sector(s);
 - 5.1.2 The **named individuals** you will assign to this project, with their CVs and/or work histories;
 - 5.1.3 Your proposed **methodology** and **timeline** for delivering against the requirements;
 - 5.1.4 Your **total contract price**, which must be inclusive of all travel and other expenses.
- 5.2 If you have any clarification questions related to your Tender Response, please submit these to procurement@nationalarchives.gov.uk by **5pm (UK time) on 4 December 2020**.
- 5.3 Please submit your Tender Response to procurement@nationalarchives.gov.uk by **12 noon (UK time) on 14 December 2020**.

6 EVALUATION CRITERIA

6.1 Your Tender Response will be evaluated using the following criteria:

Category	Maximum pre-weighted score	Weighting	Maximum weighted score
Quality (Sections 5.1.1 to 5.1.3 of your Tender Response)	10	8	80
Price	10	2	20

6.2 TNA reserves the right to shortlist an envisaged maximum of 3 Potential Suppliers to be invited for interview. After those interviews, those invited Potential Suppliers will then be re-scored, as above, but taking the interview into account as part of the overall Quality category.

6.3 Price scores will be based on a comparison between each Potential Supplier's price offer, based on the percentage difference from the lowest bid price. The lowest offered price will receive the maximum pre-weighted score of 10 points, a price which is 20% higher will receive a score of 8 (ie the maximum score minus 20%).

6.4 The Quality category will be evaluated according to the table below:

10 Points	Outstanding: <ul style="list-style-type: none">Potential Supplier has provided a response that addresses all parts of the requirementPotential Supplier has provided evidence to support all elements of their responseThe evidence supplied is convincing and highly relevant to the requirementPotential Supplier's response is clear and easy to understandWhere relevant, Potential Supplier has demonstrated a high level of capability to deliver new and innovative service approaches which add significant value to the project.
7 Points	Good: <ul style="list-style-type: none">Potential Supplier has provided a response that addresses all parts of the requirementPotential Supplier has provided evidence to support most elements of their responseThe evidence supplied is good and relevant to the requirementPotential Supplier's response is clear and easy to understandWhere relevant, Potential Supplier has demonstrated some level of capability to deliver new and innovative service approaches which may add some value to the project
4 Points	Average: <ul style="list-style-type: none">Potential Supplier has provided a response that addresses some parts of the requirement

	<ul style="list-style-type: none"> • Potential Supplier has provided evidence to support some elements of their response, but not all • The evidence supplied has some limited relevance to the requirement • Potential Supplier's response is not always clear and easy to understand • Where relevant, Potential Supplier has demonstrated limited capability to deliver new and innovative service approaches, and/or has failed to demonstrate any value added to the project.
1 Point	<p>Poor:</p> <ul style="list-style-type: none"> • Potential Supplier has provided a response that fails to address most parts of the requirement • Potential Supplier has provided little or no evidence to support most elements of their response • The evidence supplied is very weak and has very limited relevance to the requirement • Potential Supplier's response is not always clear and easy to understand • Where relevant, Potential Supplier has demonstrated little or no capability to deliver new and innovative service approaches, and/or has failed to demonstrate any value added to the project.

7 PROCUREMENT TIMETABLE

7.1 The procurement timetable is as follows:

Ref.	Description	Date
1	Deadline for Potential Suppliers to submit clarification questions to procurement@nationalarchives.gov.uk *	5pm 4 December 2020
2	Deadline for Potential Suppliers to submit Tender Responses to procurement@nationalarchives.gov.uk	12 noon 14 December 2020
3	Timebox for evaluation of Tender Responses, including shortlisting for interview stage	15 to 17 December 2020
4	Timebox for interviews (if required) Please keep these dates free	18 and 19 December 2020
6	Contract award	Week commencing 4 January 2021
7	Project completion	31 March 2021

* Any clarification question received that TNA deems to be relevant to more than one Potential Supplier may be shared with all Potential Suppliers.

8 CONTRACT TERMS

- 8.1 The contract will be awarded subject to our standard terms and conditions, which can be found [here](#).
- 8.2 TNA reserves the right not to award and to complete its objectives through other means.