INVITATION TO TENDER

EMAIL MARKETING

CLOSING DATE FOR TENDER RESPONSES -
5PM (UK TIME) TUESDAY 4 JUNE 2019

1   BACKGROUND

1.1   The National Archives (TNA) is a non-ministerial department, and the official archive and publisher for the UK Government, and for England and Wales. We are the guardians of over 1,000 years of iconic national documents including the Domesday Book, Magna Carta, Nelson's will, and service records or war diaries from a range of conflicts.

1.2   We are expert advisers in information and records management, we fulfil a leadership role for the archive sector, and we work to secure the future of physical and digital records. More information about The National Archives can be found here: http://www.nationalarchives.gov.uk/about/our-role.

1.3   Our site at Kew is free and open to all. Our ambition is to change the way people think about archives, to encourage engagement at all levels and to increase the number of visitors to our building and outdoor spaces. In addition to meeting the needs of researchers and historians, we have a growing exhibition and events programme targeting the wider public and families.

2   THE REQUIREMENT

2.1   We send around 12 million marketing emails per year to over 300,000 subscribers, featuring a wide variety of content and targeted at a wide variety of audience and stakeholder groups. Email remains our single most effective way of directly communicating with our customers.

2.2   Our main fortnightly email update is sent to around 250,000 subscribers, and contains a mix of content that reflects the public-facing work and services offered by The National Archives. We also send several supplementary mailings to subscribers on top of this update, primarily retail promotions for our online shop and events programme, targeted at subsets of our mailing list. We also distribute a number of specialist campaigns, focused on different areas of our work, to various stakeholder lists.

2.3   Our current email marketing contract expires at the end of July 2019, and we are looking for a supplier who will not only deliver this service for us from 1 August 2019, but ensure a seamless transition between services.

2.4   Our maximum available budget is £31,000 per annum (including VAT). This contract will run for two years initially, with possibility of extension for a further year.

2.5   The appointed supplier will be required to accept TNA's contract terms and conditions for services, published here.

2.6   Annex 1 provides more detail about our functional and technical requirements. Annex 2 provides an example of our data structure.

3   HOW TO RESPOND

3.1   Please submit your tender response – specifying how you will meet the requirement described in Section 2 of this Invitation to Tender – to procurement@nationalarchives.gov.uk by **5pm on Tuesday 4 June 2019**.

3.2   It is for you to determine what format this response should take so as to describe your offering in a clear, comprehensive fashion. However, please note that your response should as a minimum:

- describe your proposed deliverables and approach;
- include evidence of your expertise and experience in this area;
- nominate the key team members proposed to work on the project; and
- specify your proposed contract price.

3.3   If you have any clarification questions, please submit these to procurement@nationalarchives.gov.uk by **5pm on Wednesday 22 May 2019.**

3.4   Potential Suppliers should note that there are grounds for mandatory exclusion from being awarded government contracts. By submitting a Response you are self-certifying that none of these grounds apply to you or your organisation (or any other person who has powers of representation, decision or control in the organisation), or to any agents, affiliates or sub-contractors.

4   EVALUATION

4.1   Tender responses will be evaluated using the following criteria:

Quality (against requirements)   70%
Price   30%

4.2   Once tender responses have been evaluated, we envisage that a maximum of 4 potential suppliers will be shortlisted to present their proposals to us on **Wednesday 12 June 2019**. **Please keep this date free.** Tender responses from those shortlisted suppliers will then be re-evaluated, taking the presentation into account for quality score purposes.

5 PROCUREMENT TIMETABLE

Ref	Description	Date (s)
1	Deadline for potential suppliers to submit clarification questions *	5pm, Wednesday 22 May 2019
3	Deadline for potential suppliers to submit tender responses	5pm, Tuesday 4 June 2019
4	Presentations of short-listed suppliers	Wednesday 12 June 2019
5	Contract award	w/c Monday 17 June 2019
6	Completion of data transition, set-up and testing	31 July 2019

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

TNA reserves the right not to appoint and to achieve its objectives through other means.

ANNEX 1

Functional requirements

Ref	Description of requirement	Category	Priority	Notes
F1	The supplier to design a suite of TNA branded templates in line with brand.	Design/ Campaigns	Mandatory	
F2	Ability to create mobile responsive campaigns	Design/ Campaigns	Mandatory	
F3	A browser-based solution for designing campaigns which is non -technical for users to utilise (e.g. a drag and drop solution not html based) 'WYSIWYG' including basic image editor within platform	Design/ Campaigns	Mandatory	
F4	The ability for users to send email content to selected customers at a specified date and time.	Design campaigns	Mandatory	
F5	The facility to include dynamic content based on certain criteria	Design/ campaigns	Mandatory	
F6	The ability for users to specify the 'friendly from', sender email address and domain on outgoing bulk emails.	Design/ Campaigns	Mandatory	
F7	The ability to create and send campaigns and monitor and segment, all within a single platform	Design/ Campaigns	Mandatory	
F8	The ability to test each campaign for deliverability/spam/inbox and device rendering	Design/ Campaigns	Mandatory	

F9	The ability for users to conduct split tests on the relative performance of various elements of email communications, such as subject line, content type or day of the week.	Design/ Campaigns	Mandatory	This would allow users to identify what works best and to refine future bulk emails accordingly.
F10	Ability to create / edit / delete custom data fields	Management of lists	Mandatory	
F11	Ability to record and respond to customers ' permissions, and not email customers for whom there is no current consent recorded, and must be able to supply details for information requests.	Management of lists	Mandatory	
F12	The ability for customers to unsubscribe from further communication when receiving an email (and for their database record to be automatically updated accordingly).	Management of lists	Mandatory	
F13	The ability for customer database records to be automatically updated to record the date and time of any email that is sent to them.	Management of lists	Mandatory	
F14	The ability to view all historic activity of each customer – to do this a single record needs to be created and maintained for each customer	Management of lists	Mandatory	
F15	The ability for a customer to manage their own subscription preferences, eg through a preference centre	Management of lists	Mandatory	An example would be where a customer has multiple subscriptions to e-newsletters and this would be a place where the customer could view all their subscriptions and opt in/out of these 'at the click of a button'.

F16	A clear, interactive and dynamic reporting tool available from the 'front end'	Reporting functions/ Segmentation	Mandatory	More details below, however reporting must be able to be configured to user needs
F17	The ability for users to conduct split tests on the relative performance of various elements of email communications, such as subject line, content type or day of the week.	Reporting functions/ Segmentation	Mandatory	This would allow users to identify what works best and to refine future bulk emails accordingly.
F18	The ability for users to track the effectiveness of each email sent.	Reporting functions/ Segmentation	Mandatory	This would require information such as delivery rates, open rates, click through rates and unsubscribe rates.
F19	Full reporting tool to show the performance of each campaign, along with a tool to compare performance of campaigns against each other; Reporting tool to include ability to easily export reports into csv or excel - plus desirable ability to create custom reports	Reporting functions/ Segmentation	Mandatory	e.g. geo tools and heatmaps
F20	Ability to link to Google Analytics – our business reporting tool	Reporting functions/ Segmentation	Mandatory	
F21	The ability for users to identify customers who have not opened or acted on mailings within a specified period.	Reporting functions/ Segmentation	Mandatory	
F22	The ability to manage multiple mailing lists/ add lists with customers belonging to more than one list	Reporting functions/ Segmentation	Mandatory	
F23	Reporting breakdown for each campaign by email/ device/ browser/ email client	Reporting functions/ Segmentation	Mandatory	

F24	The ability to generate segments based on customers history of engagement with us or based on other criteria (e.g. data fields)	Reporting functions/ Segmentation	Mandatory	
F25	Supplier reassurance that our deliverability will not be affected adversely by email reputation of other clients	Deliverability	Mandatory	
F26	A service to investigate and resolve and deliverability issues	Deliverability	Mandatory	
F27	A service desk available from at least 07:00 to 21:00	Account management	Desirable	
F28	A full SLA with agreed account management	Account management	Mandatory	
F29	Proactive account management with regular reviews of success of campaigns and benchmarking. Regular training opportunities, webinars live chat – to enable access to make the best of all resources and tools available	Account management	Mandatory	

Technical requirements:

Ref	Description of requirement	Priority	Notes
T1	User Interfaces must comply with the National Archives' User Interface accessibility standards.	Mandatory	http://www.nationalarchives.gov.uk/design-guide/accessibility/wcag-2-0-checklists/

T2	Users must have their own personal login.	Mandatory	A desirable feature would be to have a remember me/ remember my password feature so that if a user is using the system throughout the day, whenever they are logged out/timed out of the system, it only takes 'one click' to log back in to the system.
T3	There must be the ability to configure multiple user profiles with different levels of access/ security privileges. Each user would be assigned one of these profiles which would control their access to the system.	Mandatory	
T4	The database must be capable of managing 250,000 contact records and their associated transactions for the purposes of initial implementation. To support future business growth, it must be able to operate effectively at a size of 350,000 customer records and their associated transactions.	Mandatory	
T5	The system must automatically log a system user out of their session after a set time of inactivity.	Mandatory	
T6	The system must be able send out 250,000 + e-newsletters at a size of up to 500kb within a 24 hour period.	Mandatory	
T7	The National Archives is looking for a fully hosted solution with all data held within the European Economic Area (EEA), and preferably within the United Kingdom.	Mandatory	The National Archives and its delivery chains must adhere to all mandatory HMG security requirements as defined in the Security Policy Framework (SPF). Further information security requirements are given separately.
T8	The language required for the system is English (UK).	Mandatory	Note – We will also need to be able to capture data in other Western European languages (e.g. French, German, and Spanish).

T9	The ability to mine the database both through the front end and being able to create exports of data (e.g. mailing lists) with custom range of output fields	Mandatory	Output of lists should be as csv, txt or excel. Should be able to export all or some of the data (fields and / or contacts)
T10	The ability to amend lists of contacts : both creating and editing/deleting, both individual records and in bulk	Mandatory	e.g. creating records through the front end, or importing a list of contacts stored (text file or excel) and being able to direct which lists they are imported to
T11	A reliable and accessible API linking into the data to be able to report and analyse data in an automated way	Desirable	The ability to set up regular calls of the API to export data - with little or no user maintenance required. This is listed as desirable but would be mandatory if the 'front end' reporting and exporting capability has limited bespoke data reporting/extracting.
T12	Automated data hygiene tasks, e.g. validation, global suppression checks, de-duplication processes	Mandatory	Reporting on these tasks necessary also, e.g. number of email addresses de-duplicated, suppressed etc.
T13	Capability to send emails out from a subdomain of The National Archives (e.g. sender@example.nationalarchives.gov.uk), describing how only The National Archives would be able to do so.	Desirable	
T14	Personal data must not be unlawfully disclosed: to other subscribers, sold or shared as a list with third parties, by a security breach.	Mandatory	

Information security requirements:

Ref	Description of requirement	Priority	Notes
S1	Demonstrate good information security governance and practices, typically through externally validated accreditation of policies and practices against recognised standards, e.g. Cyber Essentials Plus, ISO 27001.	Mandatory	
S2	Demonstrate good information security risk management, through creation and adoption or demonstration of a risk management plan including: roles and responsibilities, risk management activities, and security controls in place to mitigate risks.	Mandatory	
S3	Provide information on suppliers or other subcontractors used in the provision of the service, and describe how they ensure security requirements are set with suppliers and maintained throughout service operation.	Mandatory	
S4	Adhere to EU General Data Protection Regulation (GDPR) obligations, and demonstrate your capability to act as a processor of personal data for individuals within the EU and the EEA.	Mandatory	

S5	Assess themselves against NCSC's fourteen Cloud Security Principles, clearly identifying those areas and controls which are under your responsibility or that of your own suppliers and also responsibilities which The National Archives is required to maintain as part of its use of the service.	Mandatory	https://www.ncsc.gov.uk/collection/cloud-security?curPage=/collection/cloud-security/implementing-the-cloud-security-principles

ANNEX 2

Data structure:

Ref	Field Name	Field Type	Notes
1	Email Address	Lookup	Note, the following fields are at an Email Address resolution, and describe the minimum level of fields required. Full send, open history per contact would also be expected as a separate data table
2	Title	Free Text	
3	First Name	Free Text	
4	Surname	Free Text	
5	Town/City	Lookup	
6	County	Lookup	
7	Postal Code	Free Text	
8	Country	Lookup	
9	Job Title	Free Text	
10	Organisation Name	Lookup	
11	Subscriptions n	Y/N	Allows the system user to associate the contact with one or more subscriptions.
12	Permissions n	Y/N	Allows the system user to identify which method(s) of communication the contact has 'opted in' to (e.g. email, telephone), or frequency preferences. Also ability to show source of opt in where possible.
13	Date created	Date/Time	Date that the record was created
14	Source	Text	Source that record was created from, e.g. homepage sign up, eventbrite sign up… etc
15	Date first mailed	Date/Time	Earliest date the record was sent an email
16	Date first opened	Date/Time	Earliest date the record opened an email

17	Date last mailed	Date/Time	Latest date the record was sent an email
18	Date last opened	Date/Time	Latest date the record opened an email
19	Total number of emails sent	Integer	
20	Total number of emails opened	Integer	
21	Date unsubscribed	Date/Time	Record of when/how record was unsubscribed (note important to see full range of fields for records even if unsubscribed)
22	Source unsubscribed	Text	Record of when/how record was unsubscribed (note important to see full range of fields for records even if unsubscribed)