

The National Archives Invitation to Tender

Title: Successful Service Transformation for Archives, training modules and materials development

Deadline for receipt of tender proposals: 26 January 2018

Return to: lucy.davis@nationalarchives.gsi.gov.uk

1 Purpose

- 1.1 The purpose of this procurement process is for The National Archives (TNA) to select a supplier to create a training module for use by TNA's Archives Sector Development department to deliver to the archive sector.
- 1.2 The outcome will be a comprehensive suite of training materials which will deliver the learning objectives and enable the ASD team to deliver the training as effectively as possible to the entire UK Archive Sector

2 Background

- 2.1 The National Archives is the official archive and publisher for the UK government and guardians of over 1,000 years of iconic national documents. Archives can be used in a variety of ways, from enabling insightful and pioneering research, and inspiring art and literature, to informing decision making in all types of organisations.

Since 2012 The National Archives has held the responsibility for leadership of the archives sector comprising of over 2600 Archive services. Part of its purpose is to ensure sustained or improved preservation of and access to the nation's archive collections across the private, public and voluntary sectors

- 2.2 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.
- 2.3 Resilience is one of the three key themes identified in the strategy for the sector Archives Unlocked; it is within our role as our sector lead to provide training and support to the sector which enables archivists to successfully transform archives so they are fit for the future.
- 2.4 The sector is undergoing a period of unprecedented challenge and opportunity including technological change, change in funding structures, and change in user expectations. All of these areas present opportunity for the sector. To be

in a position to exploit such opportunities archive organisations need to be resilient and able to undertake successful service review and transformation.

- 2.6 In 2018/19 the Archive Sector Development training offer to the sector will reflect the priorities identified in the Archives Unlocked strategy: digital capacity building, engineering resilience, delivering impact. .

3 Requirement

- 3.1 The National Archives, Archive Sector Development department seeks to commission a suitably qualified organisation or individual to design and develop a suite of products; including a face to face training module, training toolkits and e-learning materials which will help provide professionals within the archives workforce with the knowledge and skills they will need to conduct and plan a successful service transformation within their organisations.
- 3.2 The outcome of this training package will be robust, effective materials which will be delivered sector wide support to as many archives as possible (face to face or online). In all format the training should empower, enable and support the delegates to understand the aims and objectives of service reviews, execute successful service review and use the outcomes of the review to create meaningful transformation within their organisation.
- 3.3 The learning objectives of this training:
Successful service transformation/ review is vital in order that archives can ensure that they are aligned with the priorities of their parent organisation and demonstrate the ways in which they add value to the wider parent organisation's strategic plans.

This training should break down the process of a service review and transformation into manageable steps. The training and materials will deliver practical support; relevant to the archive sector, enabling delegates to take a proactive approach to service transformation, even within the most challenging environment.

As a result of the training delegates will be able to understand the preparation required for a successful service review, how to select the right service review, understand the importance of engaging the right stakeholders and leave with some relevant, practical hints and tips on how to do this, which can be put into practice in the workplace.

- 3.4 The training materials should address the following areas:
Service review
- Definition of a service review/transformation
 - Taking a strategic view of the parent organisation and the archive
 - Key drivers to consider when conducting a service review (contribution to parent organisation and outcomes, evidence based approach)
 - Illustration of different types of service review and service transformation
 - Different techniques for conducting a services review such as LEAN or systems thinking, self-assessment and CSIT

- Varying levels of a service review (For example entire organisation transformation versus small scale staff restructure)

Stakeholder engagement

- How to identify and engage with key stakeholders
- The direct correlation between levels of engagement and successful service transformation/review outcomes

Preparing for a service review and avoiding the pitfalls

- The importance of planning and timetabling
- The importance of using the right evidence
- New accreditation standards
- Financial information
- Benchmarking information from other services
- Evaluating the value for money the organisation delivers
- Evaluating how the service meets the outcomes of the parent organisation

- 3.5 All material should be tailored specifically to the Archive sector and include case studies from or directly relevant to the archive sector.

Training will be delivered to representatives from the entire archives sector, thus should be relevant to all archives and include examples ranging from local authority archives, higher education archives, business archives, charitable archives and cultural archives.

- 3.6 Project deliverables are:

- (a) A comprehensive suite of training materials, to be delivered to TNA by 31 March 2018, to include:
- The In-person training materials (e.g. PowerPoint, workshop handouts, workshop activities, workbooks) must be suitable for a one-day training workshop to introduce each module topic, key tools, challenges and applicable standards in each topic area. The toolkit should be suitable to both support the training module and also be available online as a stand-alone support for those that are unable to attend the training.
 - A guide for trainers and all relevant material so that the learning module can be successfully delivered by a range of skilled trainers.
 - E-learning materials suitable for use in a series of Moodle e-learning modules (the provider will not be asked to upload the materials into Moodle).
- (b) To be delivered by 30 June 2018, two days face to face training at one London venue and one Birmingham venue.

4 Budget

- 4.1 The budget for this piece of work is £4000 (**inclusive** of VAT), travel and other expenses

5 How to respond

- 5.1 If you have any clarification questions related to your response, please submit these to lucy.davis@nationalarchives.gsi.gov.uk by **12 noon, 10th January 2018**.
- 5.2 Please submit your response to lucy.davis@nationalarchives.gsi.gov.uk by **5pm, 26th January 2018**.
- 5.3 It is for you to determine what format your submission should take so as to describe your offer in a clear, comprehensive and convincing fashion; however, you should note that the information you supply may be used, in whole or in part, to populate the Contract Schedules. As such, please make clear and unambiguous statements about the commitments you are making.
- 5.4 Your response should include the following:
- 5.4.1 Your understanding of the **project and deliverables**.
- 5.4.2 Details of your understanding of the **specific needs** of the archive sector, including understanding of Successful Service Transformation in the archive sector.
- 5.4.3 Your proposed **methodology** for delivery of the project outcomes.
- 5.4.4 Names and experience of **individuals** assigned to the project, and their involvement with each phase or unit of the work.
- 5.4.5 **Costs** – including breakdown for costs of each phase or unit of work, day rate of each team member and other costs or expenses.

6 Evaluation

Submissions will be evaluated according to the following criteria:

Category	Maximum Score Available	Weighting	Maximum Available Weighted Score
1. Your understanding of the project and deliverables (Section 5.4.1)	10	2	20
2. Details of your understanding of the specific needs of the archive sector, including understanding of Successful	10	2.5	25

Service Transformation in the archive sector. (Section 5.4.2)			
3. Your proposed methodology for delivery of the training outcomes (Section 5.4.3)	10	2.5	25
4. Names and experience of individuals assigned to the project, and their involvement with each phase or unit of the work. (Section 5.4.4)	10	2	20
5. Costs (Section 5.4.5)	10	1	10
Total	50	-	100

7 Contract

The contract will be awarded according to our standard terms and conditions, which can be found [here](#).

The National Archives reserves the right not to appoint and to achieve its requirements through other means.