The National Archives

INVITATION TO TENDER

EVALUATION OF
TRANSFORMING ARCHIVES AND *OPENING UP SCOTLAND'S ARCHIVES*

DEADLINE FOR TENDER RESPONSES: 5PM, 21 APRIL 2017

1   PURPOSE

1.1   This Invitation to Tender specifies the requirements for the evaluation of two 'Skills for the Future' traineeship projects - *Transforming Archives* and *Opening Up Scotland's Archives*, and their associated required outputs.

1.2   The National Archives (TNA) and the Scottish Council on Archives (SCA) have worked closely together during the development and delivery phase of both projects and as a result want to commission an external supplier to carry out a joint evaluation of both projects. We anticipate that the benefits of taking a joint approach to the evaluation are:

- a greater evidence base around the role of traineeships in meeting skills gaps in the archive sector; and
- an improved understanding of the strategic impact of traineeships on host archive services and the wider archive sector.

1.3   For this requirement, we is particularly keen to hear from contractors with strong analytical and writing skills, experience of stakeholder engagement and the ability to apply knowledge of the cultural heritage and learning sectors.

2   BACKGROUND

2.1   TNA is the official archive and publisher for the UK government, and for England and Wales, holding official records containing 1,000 years of history. Our role is to collect and secure the future of the government record, both digital and physical, to preserve it for generations to come, and to make it as accessible and available as possible. We are a non-ministerial department and our parent department is the Department for Culture, Media and Sport. More information on TNA can be found at www.nationalarchives.gov.uk.

2.2   SCA is the lead body for the advocacy and development of archive and records management services in Scotland. We lead on the advocacy and development of archive services in Scotland and support both historic collections and modern records management services. The work we do falls under four broad headings:

- Research – collecting information about Scottish archives;
- Advocacy – making the case for continued investment in Scottish archives;

- Marketing – promoting opportunities for research and learning in Scottish archives; and
- Development – providing training and development opportunities for Scottish archives.

3 THE REQUIREMENT

3.1 We are seeking to appoint an external Supplier to analyse the project evaluation data, to identify strategic issues arising from the data and to test these assumptions with stakeholders.

3.2 The Supplier will be required to review and analyse existing evaluation data, collected from trainees and from host archives services, in order to:
- Assess the impact of the project on the trainee;
- Assess the impact of the project on the host organisation; and
- Assess the impact of the project on the wider archive sector (e.g. new employers).

3.3 The Supplier will engage with stakeholders across the archives, funding and workforce sectors to ensure that the analysis, case for support and next steps offer realistic and constructive recommendations for developing skills in the archives sector.

3.4 The contractor must:

3.4.1 Deliver the final report and associated resources by 6 November 2017 (unless otherwise agreed with TNA).

3.4.2 Participate in fortnightly monitoring meetings with TNA's Transforming Archives Project Manager to review and discuss the progress and quality of the materials being designed, and present the findings to date at an event for TNA (date tbc) and SCA (Edinburgh, 15 August 2017).

4 PROJECT DELIVERABLES

4.1 The project must produce a series of outputs that evaluate the projects aims and key indicators as set out in Appendix A. You should explain what outputs you intend to provide, but we expect as a minimum:
- A final report;
- Summary of key findings;
- Case studies; and
- Re-usable infographics.

4.2 Taken together, the outputs must:
- Assess the success of the projects in meeting their aims and those of the Skills for the Future programme (as set out in Appendix A);
- Evaluate the traineeship model as a method for filling skills gaps within the archive sector;
- Consider the availability of progression routes for trainees;

- Evaluate the strategic impact of the projects on host archive services and the wider archive sector;
- Review the impact of external factors (e.g. current job market, changes in workforce and training practices and priorities) on the projects' aims and legacy;
- Identify lessons learnt from the projects and create best practice tools for delivering future traineeships; and
- Support the identification of next steps, including potential funding routes, for ensuring the legacies of the projects are taken forward.

4.3   As an additional output, you must identify potential funders in England and Scotland (Trusts, Foundations, Corporate, Major Donors) and develop appropriate 'Cases for Support' for traineeships:
- on an organisational basis; and
- on a nation-wide basis.

5   BUDGET

5.1   The maximum budget available for this project is £15,000, exclusive of VAT, travel and expenses. The Supplier may decide to use elements of this budget to subcontract as necessary.

5.2   TNA's premises in Kew may be used, by prior arrangement, for meeting venue(s) if required.

6   HOW TO RESPOND

6.1   Tender Responses should be submitted to procurement@nationalarchives.gsi.gov.uk by **5pm on 21 April 2017**.

6.2   Please respond by supplying the following information:

6.2.1. Your understanding of the project brief and deliverables.

6.2.2. The names and relevant experience of individuals assigned to the project, clarifying their involvement with each phase or unit of the work.

6.2.3. Your proposed methodology to address all of TNA's requirements.

6.2.4. Two examples of your written work which demonstrate high-level analytical skills.

6.2.5. A timetable detailing when you would deliver each aspect of the work.

6.2.6. Costs, including a breakdown for each phase or unit of work, day rate of each team member and other costs or expenses.

6.3   Any requests for clarification should be submitted to procurement@nationalarchives.gsi.gov.uk by **12 noon on 7 April 2017**.

7 EVALUATION CRITERIA

7.1   Tender Responses will be evaluated using the following criteria:

CATEGORY	MAXIMUM AVAILABLE SCORE	MAXIMUM AVAILABLE WEIGHTED SCORE
Understanding of the brief and deliverables (Section 6.2.1)	10	35
Relevant experience (Sections 6.2.2 and 6.2.4)	10	25
Methodology and timetable (Sections 6.2.3 and 6.2.5)	10	30
Costs (Section 6.2.6)	10	10

7.2   For each Category (apart from Cost, see Section 7.3 below), a points score between 1 and 10 is available. These points will be allocated applying the criteria as listed in the table below. If any Category within your Proposal mainly has the criteria of one score, but also has one or more criteria of a lower score, then that Category will be awarded the lower score.

10 Points – Outstanding
• Potential Supplier has provided a response that addresses all parts of the requirement.   • Potential Supplier has provided evidence of added value within their response. The evidence supplied is convincing and highly relevant to TNA's requirement.   • Potential Supplier's response is clear and easy to understand.
7 Points – Very Good
• Potential Supplier has provided a response that addresses all parts of the requirement.   • Potential Supplier has provided evidence where necessary to support their response. The evidence that is supplied is good and relevant to TNA's requirement   • Potential Supplier's response is clear and easy to understand.
5 Points – Average
• Potential Supplier has provided a response that addresses most parts of the requirement.   • Potential Supplier has evidence to support most parts of their response. The evidence that is supplied has some relevance to TNA's requirement.   • Potential Supplier's response is clear and easy to understand.
3 Points – Below Average
• Potential Supplier has provided a response that addresses some parts of the requirement.   • Potential Supplier has evidence to support some parts of their response but not all. The

evidence that is supplied is weak or not always relevant to TNA's requirement.
- Potential Supplier's response is not always clear and easy to understand.

1 Point – Poor

- Potential Supplier has provided a response that fails to address most parts of the requirement.
- Potential Supplier has little or no evidence to support most of their response. The evidence that is supplied is very weak or has little, or no, relevance to TNA's requirement.
- Potential Supplier's response is not always clear and easy to understand.

7.3   The lowest priced submission will be awarded the maximum score available for the Cost Category. All other bids will be awarded the maximum score reduced by the proportion by which they are more expensive.

7.4   Following this evaluation, TNA may choose to conduct interviews, either by telephone of face-to face at TNA's sole discretion, following which any Potential Suppliers selected for interview will have their submission/interview re-evaluated on the following basis:

CATEGORY	MAXIMUM AVAILABLE SCORE	MAXIMUM AVAILABLE WEIGHTED SCORE
Understanding of the brief and deliverables (Section 6.2.1)	10	30
Relevant experience (Sections 6.2.2 and 6.2.4)	10	20
Methodology and timetable (Sections 6.2.3 and 6.2.5)	10	20
Costs (Section 6.2.6)	10	10
Interview	10	20

8   PROCUREMENT PROCESS

The Procurement Timetable is as follows:

Ref.	Description	Date
1	Invitation to Tender published	Monday 27 March 2017
2	Deadline for Potential Suppliers to submit clarification questions to procurement@nationalarchives.gov.uk	12 noon, Friday 7 April 2017
3	Deadline for TNA to respond to clarification questions*	Wednesday 12 March 2017
4	Deadline for Potential Suppliers to submit their Tender Responses to procurement@nationalarchives.gov.uk	5pm, Friday 21 April 2017
5	Timebox for TNA to evaluate Tender Responses, including possible telephone interviews with Potential Suppliers	24 April 2017 to 9 May 2017
6	Contract award and feedback to unsuccessful Potential Suppliers	Friday 12 May 2017

9   CONTRACT TERMS AND CONDITIONS

The contract will be awarded under our standard terms and conditions for services. Please note your Tender Response may be used, in whole or in part, to populate the contract schedules. As such, you should make clear and unambiguous statements about the commitments you are making.

The National Archives reserves the right not to appoint and to achieve the outcomes of the project through other methods.

Appendix A

Opening Up Scotland's Archives* and *Transforming Archives

The two projects have provided 56 traineeships for people new to the sector over a three year period in Scotland and England. The aims of the projects are:

- To diversify the archives workforce
- To address gaps in the skills available in the archives workforce
- To provide new routes into working in the sector

The traineeships are delivered in partnership with archive services (who host the trainees) and the year-long traineeships provide an introduction to archives, training and on the job development in specific skills gap areas. These skills are:

- Digital Preservation
- Digitisation
- Outreach and engagement
- Collection development
- Traditional skills (e.g. Latin and palaeography)

Skills for the Future
The Heritage Lottery Fund's Skills for the Future programme provides work-based training in a wide range of skills that are needed to look after buildings, landscapes, habitats, species and museum and archive collections, as well as equipping people to lead education and outreach programmes, manage volunteers and utilise digital technologies. The Heritage Lottery Fund has provided grants to organisations that demonstrated a skills shortage and have developed training programmes that:

- Increase the range and quality of work-based training to develop skills in the heritage sector
- Meet identified skills shortages in the heritage sector
- Increase the capacity of the sector to deliver training and share good practice
- Increase the diversity of the heritage workforce