New Collections Management System(s)

Summary

The National Army Museum (NAM) is inviting software vendors and systems integrators to tender for the supply and ongoing support for new Collections Management System(s).

1 - Background

About the National Army Museum

Founded in 1960 by Royal Charter, the National Army Museum (NAM) was established for the purpose of collecting, preserving, and exhibiting artefacts and items relating to the history of the Land Forces of the Crown. The Museum is an Executive Non-Departmental Public Body (ENDPB) run by a board of up to 12 Trustees known as the Council of the National Army Museum. The Museum is a Registered Charity and has been fully accredited since 2009.

NAM is the leading authority on the history and traditions of the British Army. It tells the story of Our Army (as defined in the Royal Charter) through the people who served.

NAM's mission

To engage and inspire everyone with the stories of our soldiers and how their service shapes our world; past, present and future.

NAM's core values

Integrity, Teamwork, Respect, Empathy, Inclusivity.

NAM's strategic objectives

1. **Audiences:** Inspire and excite the British Public with Our Army's story
2. **Research:** Become the national authority on the history of Our Army
3. **Collections:** Safeguard, develop and make accessible our collections
4. **Partnership:** Enable, support and engage with regional military museums in UK and international partners
5. **People, Process and Organisation:** Operate around strong core business processes and sustainable finances

About NAM's existing Collections Management System

The National Army Museum holds approximately a million items in the care of its accessioned Collections. This consists of a wide variety of material with a range of data requirements.

The Museum has utilised a digital collections management system since 1990. It migrated to its current platform (Cabal) in 1998 - a custom-designed database, developed and maintained in-house by the Museum's Technical Services team.

The system, built on the Claris FileMaker platform, was designed to meet some key principles:

- Be designed and constructed in line with both national and international standards,
- Allow for rapid data entry by stakeholders,

- Create a centralised database of collection items of all types,
- Achieve a degree of control over the Museum's collection,
- Allow for the inclusion of digitised images and multimedia,
- Provide a future-proof, scalable, flexible system,
- Be cost effective in development, maintenance and support.

Over the years, the system has been adapted and expanded to meet the NAM's changing objectives whilst facilitating the requirements of the Museum's various stakeholder groups.

As the Museum enters its latest phase of development, the collections management function has been identified as an area needing improvement and the systems in place to facilitate this function being an area for potential enhancement.

NAM's key collection management functions consist of:

- Object entry
- Inventory
- Acquisition and accessioning
- Location and movement control
- Transport of collections
- Cataloguing
- Condition checking completing a condition report (including photo updates)
- Loans in
- Loans out
- Object review
- Disposal workflow
- Auditing
- Retrievals and access
- Photography and reproduction (including rights management)
- Exhibition and gallery selection
- Valuation and insurance

2 - Vision for the Museum's Collection Management System(s)

A collections management system is more than a tool for collections staff, curators and researchers. At its most basic level, it is the beating heart of the National Army Museum, providing a list of all collection assets we hold and enabling us to present history in an accessible and exciting way.

Improving the discoverability of our historical collection is at the heart of the National Army Museum's future. Whether researching new exhibitions, sharing soldiers' stories on our website, creating exciting new ways to engage with our audience with technology, or simply managing our collection stores, finding and exploring the artefacts, digital items, archives and stories of which we are the custodians is key to our work.

Effectively documenting our collections is, therefore, fundamental to understanding the history of the Army and fulfilling the Museum's role as a public institution. The tools used to access and manage the collection must support the Museum's teams as they work to deliver a world-class service to the public.

2.1 Supporting standards compliance

A well-documented historical collection is fundamental to our success. Consistency and completeness of data drives discoverability through improved finding and filtering whilst ensuring our collections are being managed effectively from acquisition proposal to disposal.

We want the use of nationally and internationally defined and recognised standards to underpin the work of the Museum in best-practice and interoperability. By tightly aligning our internal processes with well-defined procedures, we can ensure our data is comprehensive, effectively structured and future-proof.

Key collection and library standards to which our processes and data capture must adhere are:

- Spectrum 5.1
- General International Standard Archival Descriptions (ISAD(G))
- International Standard Archival Authority Record for Corporate Bodies, Persons & Families (ISAAR (CPR))
- Resource Description and Access (RDA)
- Library of Congress Name Authorities
- Library of Congress Subject Headings
- Universal Decimal Classification (UDC)

Please see the Requirements List for further information.

2.2 Accessible and usable by all

Our existing Collections Management Services are used by almost all members of the Museum team. This extends to our extensive volunteer and intern workforce.

We want services used by such a broad user-base to be accessible and intuitive for both occasional and expert users. Comprehensive training and documentation should underpin staff engagement by supporting their work and guiding them to a successful outcome.

2.3 Encouraging the making of connections

The links we build between the items we hold in our collections are the cornerstone to our research efforts. The links we build between our historical collection and the Army's history keep us both relevant and engaging to our audience.

We want to augment our artefacts, digital items and archives with connections to stories, people, places, events, other items, etc. to drive discoverability and to bring the collection to life for researchers and visitors alike. The creation, capture and preservation of research and interpretative data relating to our collections is crucial as these are the foundations for our future successes.

2.4 Built to share

The Museum's Vision is to share the history and heritage of our soldiers and their service in the Army, across the globe. Achieving this requires sharing and openness to be embedded in both our technical systems and our culture.

We want the Museum's collection management systems to be designed with sharing and interoperability at their core. It is normal for our audiences to be engaging with their interests through a wide range of channels. Meeting the expectations of our audience is vital to NAM achieving its vision.

2.5 Accommodating all collections

The National Army Museum's historical collection is as broad and diverse as any national museum collection. Each object type requires an appropriate approach to its data structure to ensure the relevance and completeness of its information.

We want the Museum's collection management systems to support every type of artefact, digital asset and archive on an equal footing to ensure all historical items offer equal value to both the Museum and its audience. The effective migration of data housed in the existing system is crucial to maintaining continuity and consistency across our collections whilst identifying issues requiring resolution.

2.6 Project orientated approach

With the advent of agile working practices, and with capacity and resources becoming increasingly constrained, the National Army Museum is rescoping all aspects of its work along more defined roadmaps. In doing so, work relating to the collection is increasingly being defined and driven by carefully planned, funded, resourced and evaluated projects.

We want this approach to our documentation plan to deliver not only successful outcomes, but to offer valuable feedback that helps inform the institution in how its historical collection can be used and documented in the future.

2.7 Utilising the latest technologies

The National Army Museum currently utilises an integrated systems architecture - whereby best-of-breed systems are combined using their APIs to build a platform greater than the sum of its parts. Approaching our services in this way means we can adapt our service architecture more swiftly around our requirements whilst avoiding the pitfalls of large-vendor inertia.

We want to utilise the very best aspects of the latest technologies in our work as a national museum. We want technology to drive improvements in our processes and productivity as well as help us deliver innovative services to our customers. Technology will help us document and explore our collection more effectively whilst discovering new ways for it to inspire our audience.

2.8 Designed to be sustainable and flexible

The systems we utilise to manage and interact with our historical collections will offer services that will be used for many years to come. In a changing world, however, being able to adapt quickly to shifting circumstances is crucial to maintaining relevance and operation

effectiveness. Over the last 20 years, both the British Army and the National Army Museum have seen significant changes to their structures, operating practices, cultures and challenges. All of these have relied on our systems being designed from the outset to absorb and reflect new strategies without 'reinventing the wheel'.

We want the systems and integration architectures we deploy to be designed with sustainability, flexibility and longevity in mind. The 'costs' associated with operating our services (e.g. financial, environmental, resourcing, support, etc.) must be carefully planned against potential future challenges to avoid any unfavourable outcomes and deliver the adaptability we will undoubtedly require.

2.9 Secure and accountable

Like all our existing services, security of our data is critical both operationally and reputationally. Robust management of user-groups and permission-sets ensures the right people are accountable for ensuring quality and control. Giving our staff ownership of their tasks allows them to take responsibility for the quality of their work.

We want collections management systems that support personal responsibility and increase levels of accountability across our processes. We want to empower our users to solve problems independently and to find creative solutions to problems.

2.10 Solid governance and financial stability

The National Army Museum operates to the highest standards of financial accountability. Our receipt of a Grant-In-Aid from the public purse requires value for money that is justifiable to our sponsor and the public through audit oversight. The Museum's financial stability is vital to ensuring continuity of service for both our users and our audience.

We want the vendors, systems and services the Museum partners with to be financially stable and subject to the security and standard controls required by a public body. Ensuring the National Army Museum can fulfil its financial, legal and fiduciary responsibilities is crucial to the mitigation of risk and the longevity of the Museum as a public institution.

3 - Principles

The key principles we believe should underpin the new system(s) introduced with this project remain consistent with NAM's existing Collection Management System's original ideas:

1. Supporting standards-based processes and data
2. Designed for use by all user-groups
3. Suitable for all aspects of the collection
4. Delivering control over our historical and research assets
5. Offering a rich multimedia experience
6. Being flexible and future-proof
7. Building upon existing data and expertise
8. Delivering seamless integration with other systems and services
9. Offering cost-effectiveness and value
10. Supporting the Museum's ongoing digital transformation

4 - Scope of works

The National Army Museum's collection incorporates many different object types. These range from large and small 3D artefacts (vehicles, weapons, uniforms, medals, etc.) to paper archives, books and an increasing volume of born-digital material. These collections are managed by the core Collections teams within the Museum:

- Collections Care (including Conservation)
- Archives, Library and Information
- Art
- Equipment and Uniforms

The remaining user groups consist of the following:

- Exhibitions
- Campaigns and Communications (including the web team)
- Visitor Experience
- Public Programmes
- Learning
- Finance
- Senior leadership team
- Technical Services (system administrators)

Note: The use of volunteers and interns is widespread across all the Museum's teams.

Each team and user-group has had input in generating the project's Requirements List and each item's prioritisation. The list is divided into groupings that reflect the different aspects of the Museum's vision for the collection management systems.

4.1 - Realising the vision

The design and deployment of software systems and services to meet the requirements identified in the Requirements List.

The National Army Museum is keen to harness the creativity of vendors and integrators to help us achieve our vision. Potential suppliers must show how they have interpreted NAM's vision and explain how their proposed solution can meet, steer or exceed our expectations.

Concept systems architecture and technology plans must identify the database products needed to meet the requirements, their individual operational scopes, the integration points and necessary data flows with other systems and the technologies and platforms being deployed. Suitable project evaluation criteria will be established at this stage.

Each service must be fully demonstrated to stakeholders in real-world situations and must be supported by peer testimony from comparable institutions to offer guidance to NAM in their decision making.

Once product choices have been made, a comprehensively documented plan must be produced detailing the systems architecture to be deployed and the platforms being utilised.

All necessary data-structural configuration of the new system(s) must be made to ensure all subject-specific candidate data can be housed within or linked to externally for relational mapping. This may include integration with existing NAM data sources.

A comprehensive plan to migrate the necessary data from the existing system to the new databases will need to be devised and agreed upon to ensure our data remains intact and consistent with existing documentation. Once agreed, the migration of data to the new system(s) must take place with sufficient checking and testing to avoid unnecessary errors.

A training schedule and supporting documentation, suitable for ongoing user-driven learning, must be produced to provide comprehensive guidance in working with the system(s).

Following a period of user acceptance testing, the remaining user-base will be migrated to the new system(s).

Once complete, a thorough evaluation of the new services will take place to ensure the new architecture is providing the value intended at the outset.

4.2 - Ongoing maintenance and support

The provision of services to maintain and improve the system(s) deployed in section 4.1.

All software platforms, systems and services must be maintained to deliver operational effectiveness. This includes new releases, updates and security patches supporting both core service and custom configurations.

Additional training materials and documentation to support maintenance releases and patches must also be produced and shared with NAM.

Ongoing and supplemental development work-packages requested by NAM must be scoped, researched costed, tested and delivered as supplementary projects, outside the scope of this project.

5 - Priorities

The National Army Museum utilises the MoSCoW method of requirement prioritisation:

- **M**ust haves: these are critical to the project's success.
- **S**hould haves: these are still very important but not critical to the project's success.
- **C**ould haves: these are desirable but not absolutely necessary to the project's success.
- **W**on't haves: these have been agreed as not necessary to the project's success but are a bonus if they can be included for no additional cost.

Each item on the Requirements List has been assessed in line with these prioritisations.

6 - Project team, outline programme and budget

6.1 - Project team

Project Sponsors   Mike O'Connor, Deputy Director
                          Ian Maine, Assistant Director (Collections)
Project Manager   Richard Hodgkinson, Head of Technical Services

Project Team   Systems Architect
                     Collections Data Manager
                     Head of Collection Standards & Care
                     Head of Archives Library & Information
                     Head of Equipment & Uniform
                     Head of Art

6.2 - Outline Programme

Milestone	Date
Issue brief	31 July 2023
Deadline for tender enquiries	25 August, 12pm
Deadline for tender submissions	1 September, 12pm
Review tender submissions and compile shortlist	w/c 4 September
Interview shortlisted companies	w/c 11 September
Appoint successful company	w/c 29 September
Work commences	w/c 2 October
Delivery of initial build of services	27 October
Migration and testing	w/c 30 October
User acceptance testing	w/c 4 December
Soft launch	w/c 1 January 2024
Training and documentation	w/c 15 January
Launch	1 April

6.3 - Budget

The main component of the scope of works (**4.1 – Realising the vision)** has a provisional budget of £65,000 (excl. VAT)

The secondary component (**4.2 – Ongoing maintenance and support)** has a separate budget. The amount will be informed by the bidders' proposed approaches for delivering this part of the scope of works. Tenderers are to provide an indicative value against this element.

NAM requires that all work delivered achieves maximum value for money.

7 - Tender Response

7.1 - Information to include

- Details of any additional discovery requirements
- An outline of you proposed methodology:
  - How you will ensure that priorities are delivered on time and on budget, to the required standard,

- o The team structure you might deploy to deliver the scope of works,
- o The communications approach you might use to ensure the necessary information reaches the relevant stakeholders in a timely manner,
- o How you will address any shifting priorities during implementation of the project.
- Concept systems architectural design
- Requirements List annotated with proposed solutions
- Details of all proposed software platforms and vendors
- Configuration requirements
- Migration plan proposal
- Training and documentation plan
- Indicative software maintenance schedules for all proposed vendors
- System and service development roadmaps (where sharable)
- Development rates for supplementary development projects

Relevant experience

Please provide at least three comparable examples of projects as well as the contact details of a suitable representative from the institution with which NAM can discuss the case study in more detail.

Costing / billing

Please provide clear totals relating to the completion of each part of the scope of works detailed in sections 4.1 and 4.2.

Please also provide information on how the costs associated with your submission have been reached and any specific payment schedules or requirements.

7.2 - Insurance

Please provide copies of up-to-date insurance. NAM requires Public Liability of at least £5 million, Employers Liability of £5 million, and Professional Indemnity Insurance to the value of £5 million.

7.3 - Financial

Please provide three years of published accounts for all vendors relating to your submission. These might include product vendors (for both core and ancillary products), integrators, training and support operators, project managers, etc.

7.4 - Forms

All company documentation as requested below:

- Annex A - The Completed Form of Tender
- Annex B - Certificate of Bona-Fide Tender
- Both forms (Annex A & B) should be signed by the Tenderer or, in the case of a Company by the Secretary or other authorised person.
- Annex C – Supplier Statement

7.5 - Tender return

All tender documents/electronic media are to be addressed to Secretariat or tenders@nam.ac.uk and annotated with "**NAM Collections Management System(s)"** and received by 12 noon on Thursday 1 September 2023. On no account are the tender documents to be passed to the requesting department before the tender board date.

Hard copy tenders are requested for reference but are not essential and can follow after the electronic submission.

Address for the return of hard copy tenders:

> Secretariat
> National Army Museum
> Royal Hospital Road
> Chelsea
> London SW3 4HT

7.6 - Tendering costs

The Museum will not be responsible for or pay for any costs or expenses that are incurred by any tendering company in preparing and submitting their tender. Tenders are to remain open for acceptance for a period of 60 days.

7.7 - Contract award criteria

The tender board will be formed of the following representatives of the National Army Museum:

- Deputy Director
- Assistant Director (Collections)
- Head of Technical Services
- Nominated members of the project team
- Purchase Ledger Assistant

Any subsequent interview panel attendees will be confirmed after the shortlisting stage.

Tenders will be assessed on the following criteria:

- Relevant experience/expertise   20%
- Proposed methodology   50%
- Costing/billing   20%
- Overall response to tender   10%

Each proposal will be given a score. A proposal shall be rejected at this stage if it fails adequately to respond to important aspects of the brief. The National Army Museum shall notify unsuccessful tenderers of the rejection of their proposal after completing the selection process.

Tenders will be awarded on the absolute discretion of the Board of National Army Museum, in accordance with internal policies and statutory regulations. The Museum is not required to

accept the lowest priced tender.

The decision will be final and binding, no correspondence will be entered into.

7.8 - Enquiries

Any enquiries arising from this Invitation to tender must be submitted in writing via email to:

Richard Hodgkinson, Head of Technical Services, National Army Museum
Email: rhodgkinson@nam.ac.uk

As noted above in **6.2 - Tender programme**, enquiries can be submitted until Monday 1 September, 12pm (noon). Answers to all enquiries will be shared with all interested parties via the listing page on Contracts Finder, the UK government portal for contract opportunities.