INVITATION TO TENDER

DIGITAL LEARNING SET

CLOSING DATE FOR TENDER RESPONSES – 12 NOON, 26TH FEBRUARY 2018

1   ABOUT US

1.1   The National Archives (TNA) is the official archive and publisher for the UK government, and for England and Wales. We are the guardians of some of our most iconic national documents, dating back over 1,000 years. We are an accredited archive service.

1.2   Our 21st-century 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.

1.3   We are also responsible for leadership of the archives sector in England, and our approach is framed by the new strategic vision for archives, *Archives Unlocked*. Our business plan, *Archives Inspire*, identifies the archives sector as one of four key audiences, and our sector leadership role is viewed as an important priority. Our approach to the leadership role is a collaborative one, supporting partnership working to encourage a sustainable and innovative archives sector.

1.4   The digital agenda is a central theme running through both *Archives Unlocked* and *Archives Inspire*. Digital technology has fundamentally changed what it means to be an archive. Archivists can help the IT and knowledge management communities by bringing professional archival practice to this digital world.

1.5   To achieve our ambitions of trust, enrichment and openness, we must tackle the barriers to success. To do so, we need to meet the key challenges facing the sector, but also advocate for archives and ensure their value is understood. The *Archives Unlocked* action plan will address three vital themes: digital capacity, resilience and impact. The plan will develop the digital capacity of the archives sector, to preserve digital records and increase discoverability of the paper and digital archive.

2 BACKGROUND TO THE REQUIREMENT

2.1 The archives sector has a strong tradition of collaborating and sharing its experience and expertise. TNA works with a number of regional and specialist networks to encourage and facilitate collaboration, including:

- London Archives Partnership
- South Yorkshire Archives Partnership
- Greater Manchester Archives and Local Studies Partnership (GMALSP)
- Archives First
- East of England Regional Archive Council
- Archives West Midlands

2.2 By developing partnerships between these different archives through our Sector Sustainability fund, TNA has led on the development of sustainable, efficient and high quality modern archival services. This approach was developed in response to the challenging financial climate for archive services, and their need to adapt to the evolving needs of users and parent bodies with little additional investment. It also responds to the current driver across local government for shared and joint services, to increase efficiency and deliver savings. Each partnership initially worked with specialist facilitators and service development experts to agree a shared mission and vision and to secure senior leadership and commitment to change.

2.3 There is a huge variation in engagement with areas such as digital preservation across the sector. A recent report which looked across the Archives First partnership concluded that '…an urgent paradigm shift is needed that focusses local authority archivists' attention on the long-term preservation of information in digital format rather than on their traditional role relating to the permanent retention of information…'.

2.4 A majority of these networks have identified a digital project as part of their collaborative work ranging from discovery and presentation of digital records through to digital preservation.

3 REQUIREMENT

3.1 TNA seeks to commission a piece of work to facilitate shared learning through a series of learning set events to join up knowledge and approaches in the digital area.

3.2 The project will:

- foster and facilitate a partnership/network of interested services as a learning set

- promote awareness across the archives sector of the different regional approaches to the digital challenge

- inform TNA's understanding of sector need, and of opportunities for TNA leadership and/or support.

3.3 The project will achieve this through these processes:

- identify a network of services ready to share regional approaches to digital challenges and keen to learn from this project

- create a learning set and a mechanism to observe, inform and interrogate the process behind, and progress of, regional projects around digital issues

- during a series of facilitated learning sets:
  - understand each project's aim, approaches and progress
  - Identify common themes and learning points across all projects
  - bring projects together to discuss common issues and share solutions and approaches
  - work with TNA to identify relevant input from TNA's expert staff

- deliver a seminar to allow the wider sector to learn from thinking developed during the learning set events with the aim of creating a self-sustaining network to continue discussions

- provide case study examples of the regional projects and approaches in this area to inform TNA's strategy for building digital capacity in the sector.

3.4 The contractors will work with TNA to select the participating services and development networks.

3.5 The Project Deliverables are, as a minimum:

- An identified network of regional digital projects

- Establishment and facilitation of a learning set

- Delivery of a seminar to share learning from the identified projects across the wider archive sector

- A series of case studies written for the TNA website

- A final report as a brief summary of project's key learning points

3.6   The Project Milestones are as follows:

Step no.	Step description	Milestone date
1	Project initiation	w/c 12th March 2018
2	Input to selection of development networks and projects	w/c 26th March 2018
3	Network and learning set established	April 2018
4	Sharing mechanism developed	April 2018
5	Project report and case studies completed	August 2018
6	Seminar with learning set to share with the wider sector	September 2018

3.7   The maximum available budget for this project is £15,000 **including** VAT and travel and expenses. In addition, TNA will provide or pay for venues and catering for meetings and learning sets, to be agreed in advance.

4   HOW TO RESPOND

4.1   Please submit your tender response to procurement@nationalarchives.gov.uk **by 12 noon (UK time) on Monday, 26th February 2018**, providing the information specified below. Please note that the information you supply in your tender response will 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.

4.2   Please ensure your tender response addresses as a minimum the points below:
- Your **understanding** of the project and deliverables
- Your **experience** suited to the project subject
- Your proposed **methodology** to meet our requirements
- The names and experience of **individuals** assigned to the project, and their involvement with each phase or unit of the work
- Your **price** – please submit your total price for delivery of this project, and include a breakdown for costs of each phase or unit of work, day rate of each team member and other costs or expenses.

4.3   If you have any clarification questions related to your tender response, please submit these to procurement@nationalarchives.gov.uk **by 5m (UK time) on Monday, 26th January 2018**.

5 EVALUATION CRITERIA

5.1 We will evaluate tender reponses using these criteria:

	CRITERIA	MAXIMUM AVAILABLE SCORE	WEIGHTING	MAXIMUM AVAILABLE WEIGHTED SCORE
1	Extent to which proposal demonstrates an understanding of the brief	10	2	20
2	Knowledge and experience relevant to the project, including understanding digital preservation, discoverability and digital access	10	2	20
3	Quality of methodology and experience in relation to facilitation, mentoring and running effective learning sets	10	3	30
4	Proposed team composition and management	10	2	20
5	Price	10	1	10

5.2 The **quality** elements of your response (1 to 4 in the table above) will be scored as follows:

10 Points	**Outstanding:** • Potential Supplier has provided a response that addresses all parts of the requirement • Potential Supplier has provided evidence to support all elements of their response • The evidence supplied is convincing and highly relevant to the requirement • Potential Supplier's response is clear and easy to understand • Where relevant, Potential Supplier has demonstrated a high level of capability to deliver new and innovative service approaches
7 Points	**Good:** • Potential Supplier has provided a response that addresses all parts of the requirement • Potential Supplier has provided evidence to support most elements of their response • The evidence supplied is good and relevant to the requirement • Potential Supplier's response is clear and easy to understand • Where relevant, Potential Supplier has demonstrated some level of capability to deliver new and innovative service approaches
5 Points	**Average:** • Potential Supplier has provided a response that addresses most parts of the requirement • Potential Supplier has provided evidence to support most elements of their response • The evidence supplied has some relevance to the requirement • Potential Supplier's response is clear and easy to understand • Where relevant, Potential Supplier has demonstrated limited capability to deliver new and innovative service approaches

3 Points	**Poor:** • Potential Supplier has provided a response that addresses some parts of the requirement • Potential Supplier has provided evidence to support some elements of their response, but not all • The evidence supplied is weak and has 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
1 Point	**Very Poor:** • 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
0 Points	**Fail:** • No response provided

5.3   The **price** scores will be based on a comparison between each suppliers price offer, based on the percentage difference from the lowest bid price. The lowest offered price will receive the maximum unweighted 10 points, a price which is 20% higher will receive an unweighted score of 8 (ie the maximum score minus 20%).

6   PROCUREMENT TIMETABLE

The Procurement timetable is a follows:

Step no.	Step description	Milestone date
1	Invitation to tender sent out	10th January 2018
2	Deadline for Potential Suppliers to submit clarification questions proposals	26th January 2018
3	TNA to provide responses to clarification questions	2nd February 2018
4	Deadline for tender submissions	26th February 2018
5	Timebox for TNA to conduct interviews with shortlisted Potential Suppliers (optional)	5th March 2018 **PLEASE KEEP THIS DATE FREE**
6	Contract award	12th March 2018

7 CONTRACT

6.1 The contract will be based on our standard Terms & Conditions for Services, which can be found here http://www.nationalarchives.gov.uk/about/commercial-opportunities/information-for-our-suppliers/

6.2 The National Archives reserves the right not to appoint and to achieve its aims through other methods.