



## **THE NATIONAL ARCHIVES**

### **EMAIL MARKETING**

#### **INVITATION TO TENDER – OPEN COMPETITION**

**CLOSING DATE FOR TENDER RESPONSES - 5PM (UK TIME) 3 FEBRUARY 2023**

#### **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 vision is to be the inclusive, entrepreneurial and disruptive 21st century national archive, connecting with the biggest and most diverse audience possible, in the most innovative ways we can. We encourage engagement at all levels and aim to increase the number of visitors to our building and outdoor spaces, as well as to our website and digital services.

## 2 THE REQUIREMENT

- 2.1 We send around 30 million emails per year to over 325,000 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, and has proven particularly effective throughout the Covid-19 pandemic.
- 2.2 Our main weekly email update is sent to just over 325,000 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 The subscriber numbers above are expected to grow during the term of the contract – up to about 370,000 subscribers and 36 million emails sent.
- 2.4 Our current email marketing contract expires at the end of April 2023, and we are looking for a supplier who will not only deliver this service for us from 1 May 2023, but ensure a seamless transition between the end of the existing contract and service commencement under this new contract; we therefore expect this contract to commence on or before 1 April 2023 to facilitate this handover period.
- 2.5 Our maximum available budget is £40,000 per annum (excluding VAT). This contract will run for two years initially, with possibility of two extensions, each for a further year.
- 2.6 Once tender responses have been evaluated, the 4 highest scoring potential suppliers will be shortlisted to present their proposals to us on **24 February 2023. Please keep this date free.**
- 2.7 The appointed supplier will be required to accept TNA's contract terms and conditions for services, published [here](#).

- 2.8 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.
- 2.9 The 'E-mail marketing – detailed requirements' Excel document provides more detail about our functional, technical and information security requirements. It also provides an example of our data structure.

### 3 ACCESSIBILITY

3.1 We take our commitment to accessibility seriously. As a public sector body we are obliged to comply with the Public Sector Bodies (Websites and Mobile Applications) Accessibility Regulations 2018 and the Equality Act 2010.

3.2 To this end, we are asking the following questions of Potential Suppliers, which you should answer in your tender response:

- Are you willing / able to enter into a contractual agreement which holds you accountable for delivering products which comply with the Public Sector Bodies (Websites and Mobile Applications) Accessibility Regulations 2018 and the Equality Act 2010?
- Do your products meet accessibility requirements e.g. Public Sector Bodies (Websites and Mobile Applications) Accessibility Regulations 2018 and The Equality Act 2010 as well as Accessibility Standards e.g. the most recent published Web Content Accessibility Guidelines? Please provide evidence and outputs of assurance activities and level of accessibility compliance.
- Do you have an established process for monitoring the level of accessibility of your product during the development lifecycle? Please provide details of your approach including staffing (noting whether internal or external consultant), tools and technologies and testing methods.
- Do those working on the product know how to make accessible systems? Provide details of the accessibility qualifications/training/skills of the designers, user researchers, developers, testers etc. and any accessibility specialists working on the product.

3.3 When considering your responses to the above questions, please note the following guidance:

3.3.1 Appropriate evidence: You can provide a number of different types of evidence to support a claim that your product is accessible. For the provision of services to deliver a product, similar documentation for other products or services you have delivered can be considered. For example:

- Voluntary Product Accessibility Templates (VPAT) with additional guidance on:
  - Workarounds;

- how non-compliant elements will become compliant;
  - how any customisation of the system might impact on accessibility, for example if the product includes a Content Management System (CMS) does this allow for accessible content authoring.
  - An accessibility statement aligned to the requirements of the Public Sector Bodies Accessibility Regulations that includes information about non-compliant elements, workaround and plans for the future.
  - Testing documentation (sometimes called an audit) from an internal or external accessibility specialist aligned to an international standard EN 301 549, or ideally the Web Content Accessibility Guidelines 2.1.
  - Outputs from testing and/or research with disabled people.
- 3.3.2 Inappropriate evidence:
- Basic statements of compliance e.g. 'We comply with WCAG 2.0'. There must be substance to the claim through some sort of appropriate evidence
  - Entirely automated testing. This has a role to play in checking for accessibility defects, but it cannot be relied on for complete coverage
  - Future looking statements on their own e.g. 'We aim to be compliant by June next year'. Whilst the intention is good, without having done some level of testing the vendor won't be able to understand where they have gaps and where they need to put effort.

3.4 User Interfaces must comply with the National Archives' User Interface accessibility standards <http://www.nationalarchives.gov.uk/design-guide/accessibility/wcag-2-0-checklists/> (subject to change, please see below).

3.5 The standards and legislation detailed above are subject to change from time to time, often outside of TNA's control. As such, we expect the Appointed Supplier to work with us as necessary throughout the contract period to ensure compliance is maintained.

## 4 HOW TO RESPOND

- 4.1 If you have any clarification questions, please submit these to [procurement@nationalarchives.gov.uk](mailto:procurement@nationalarchives.gov.uk) by **5pm (UK time) on 20 January 2023**.
- 4.2 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](mailto:procurement@nationalarchives.gov.uk) by **5pm (UK time) on 3 February 2023**.
- 4.3 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 tender response will form part of the contract and as such you should make clear and unambiguous statements and commitments. Your response should as a minimum:
- 4.3.1 Your responses to Section 3 (**Accessibility**). NOTE: you must achieve a minimum score of 7 in this Category to be considered for contract award (see Section 5 - Evaluation);
  - 4.3.2 Please tell us your arrangements for **data security**, and how your proposal complies with both **data protection** legislation and the [Privacy and Electronic Communications Regulations](#). NOTE: you must achieve a minimum score of 7 in this Category to be considered for contract award (see Section 5 - Evaluation);
  - 4.3.3 Please describe your proposed **deliverables and approach**;
  - 4.3.4 include evidence of your **expertise and experience** in this area;
  - 4.3.5 nominate the **key team members** proposed to work on the project;
  - 4.3.6 Your proposed Service Level Agreement; and
  - 4.3.7 specify your **contract price** for the initial 2 year contract term, as well as your price for the optional 2x 1 year extension periods. Your submitted contract price must include any and all duties and levies (except UK VAT, which should be excluded) which may be payable on your proposed solution as submitted. If some or all of your proposed solution includes goods or services which are sourced from outside the UK, you must tell us (a) which goods/services are sourced from outside the UK, (b) the associated

commodity code(s), (c) the associated duties and levies payable and (d) confirmation that your contract price includes all such duties and levies (except UK VAT). For the avoidance of doubt, your contract price should reflect the equivalent of Incoterm DDP (Delivery Duty Paid) and therefore the full cost to The National Archives should your bid be successful.

## 5 EVALUATION

5.1 Tender responses will be evaluated using the following criteria:

Accessibility (Section 4.3.1)	10% NOTE: you must achieve a minimum score of 7 in this Category to be considered for contract award
Data security, data protection and regulatory compliance (Section 4.3.2)	10% NOTE: you must achieve a minimum score of 7 in this Category to be considered for contract award
Other quality criteria (Sections 4.3.3 to 4.3.6 inclusive)	50%
Price (Section 4.3.7)	30%

4.1 Price scores will be evaluated as follows:

The bidder submitting the lowest compliant price will be awarded the maximum of 10 (unweighted) points. All other bidders will be awarded a (unweighted) points score by applying the following formula:

$$((\text{lowest submitted price} / \text{bidder's submitted price}) * 10)$$

To illustrate this via a worked example:

Bidder 1 submits a price of £10,000

Bidder 2 submits a price of £17,000

Bidder 3 submits a price of £31,000

Bidder 1 is awarded 10 (unweighted) points  $-((10,000/10,000)*10) = 10$

Bidder 2 is awarded 5.88 (unweighted) points  $-((10,000/17,000)*10) = 5.88$

Bidder 3 is awarded 3.23 (unweighted) points  $-((10,000/31,000)*10) = 3.23$

5.2 Quality categories will be evaluated according to the table below:

<b>10 Points</b>	Outstanding: <ul style="list-style-type: none"><li>Potential Supplier has provided a response that addresses all parts of the requirement</li></ul>
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	<ul style="list-style-type: none"> <li>• Potential Supplier has provided evidence to support all elements of their response</li> <li>• The evidence supplied is convincing and highly relevant to the requirement</li> <li>• Potential Supplier's response is clear and easy to understand</li> <li>• Where relevant, Potential Supplier has demonstrated a high level of capability to deliver new and innovative service approaches</li> </ul>
<b>7 Points</b>	<p>Good:</p> <ul style="list-style-type: none"> <li>• Potential Supplier has provided a response that addresses all parts of the requirement</li> <li>• Potential Supplier has provided evidence to support most elements of their response</li> <li>• The evidence supplied is good and relevant to the requirement</li> <li>• Potential Supplier's response is clear and easy to understand</li> <li>• Where relevant, Potential Supplier has demonstrated some level of capability to deliver new and innovative service approaches</li> </ul>
<b>4 Points</b>	<p>Average:</p> <ul style="list-style-type: none"> <li>• Potential Supplier has provided a response that addresses some parts of the requirement</li> <li>• Potential Supplier has provided evidence to support some elements of their response, but not all</li> <li>• The evidence supplied has some limited relevance to the requirement</li> <li>• Potential Supplier's response is not always clear and easy to understand</li> <li>• Where relevant, Potential Supplier has demonstrated limited capability to deliver new and innovative service approaches</li> </ul>
<b>1 Point</b>	<p>Poor:</p> <ul style="list-style-type: none"> <li>• Potential Supplier has provided a response that fails to address most parts of the requirement</li> <li>• Potential Supplier has provided little or no evidence to support most elements of their response</li> <li>• The evidence supplied is very weak and has very limited relevance to the requirement</li> </ul>

	<ul style="list-style-type: none"> <li>• Potential Supplier's response is not always clear and easy to understand</li> <li>• Where relevant, Potential Supplier has demonstrated little or no capability to deliver new and innovative service approaches</li> </ul>
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5.3 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 **24 February 2023. 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.

## 6 PROCUREMENT TIMETABLE

Ref	Description	Date (s)
1	Deadline for potential suppliers to submit clarification questions *	5pm (UK time) 20 January 2023
2	Deadline for potential suppliers to submit tender responses	5pm (UK time) 3 February 2023
3	Presentations of short-listed suppliers	24 February 2023
4	Contract award (anticipated)	1 March 2023
5	Contract signature (anticipated)	15 March 2023
5	Handover, data transition, set-up and testing	Complete by end April 2023
6	Go live	1 May 2023

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

## **7 CONTRACT**

- 7.1 The contract will be based on our standard terms and conditions for services, published [here](#).
- 7.2 TNA reserves the right not to appoint and to achieve its objectives through other means.