INVITATION TO TENDER

DEVELOPMENT OF A LEARNING PROGRAMME AND TRAINING MATERIALS FOR 'TRANSFORMING ARCHIVES: BRIDGING THE DIGITAL GAP'

DEADLINE FOR TENDER RESPONSES: 5PM, 7 APRIL 2017

1   PURPOSE

1.1   This Invitation to Tender specifies the requirements for the development of a new learning programme and supporting materials for the project 'Transforming Archives: Bridging the Digital Gap'.

1.2   For this requirement, The National Archives is particularly keen to hear from training providers with experience in qualification development and employer engagement. Experience of the archive sector is not necessarily important for this requirement. For an informal discussion about the requirement and your suitability to apply, please contact our Head of Programmes, Kate Wheeler, on 0208 876 3444 extension 2460, or kate.wheeler@nationalarchives.gsi.gov.uk.

2   ABOUT THE NATIONAL ARCHIVES

The National Archives ('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.

3   ABOUT THE PROJECT 'TRANSFORMING ARCHIVES: BRIDGING THE DIGITAL GAP'

3.1   The project, known as 'Transforming Archives: Bridging the Digital Gap' is a traineeship programme which has been awarded a first-round pass and a development grant by the Heritage Lottery Fund.

3.2   The entire programme will train 3 cohorts, of 8 trainees each, hosted at archive services across England. A cohort of trainees will start in each of October of 2018, 2019 and 2020, with each cohort's training programme lasting 15 months (i.e. until the end of 2019, 2020 and 2021 respectively).

3.3   Trainees will be recruited by TNA for their ability to demonstrate digital confidence and competency, with a minimum achievement level of 2 A levels, a Level 3

apprenticeship or equivalent work experience. We therefore anticipate a broad range of trainee backgrounds and competencies, and very limited awareness of the archives sector prior to the traineeship.

3.4   The trainees will follow a consistent learning pathway, with practical work-based activities supported by some formal learning opportunities.

4   THE REQUIREMENT

4.1   We are seeking to appoint a lead training developer to design, commission and co-ordinate the learning programme for the trainees. The outcome of this piece of work will be a robust, effective learning package for trainees on 'Bridging the Digital Archives Gap', keyed in to national frameworks (see Section 5.2 below).

4.2   The training developer must be a specialist in the design and delivery of training programmes, and need not necessarily be a specialist in archives and their practices. The training developer may wish to sub-contract in order to access key knowledge and skills.

4.3   The training developer will create an overall learning programme which takes account of employer-based development and qualification frameworks, with the potential to feed into developing a Level 4 apprenticeship qualification in digital archives as a long-term project outcome.

4.4   The training developer will consult with archives sector employers to ensure the framework meets employer needs, and to share learning from past trainees on 'Skills for the Future' projects. As part of this process they will create a model job description for a Digital Archives Assistant and ensure that the learning programme supports trainees to develop the skills required to fulfil that job description.

4.5   The training developer will write learning materials to meet the programme's module structure, reflecting expert good practice in the archives sector, and supporting formal learning and ongoing practical experience in a variety of workplaces.

4.6   The training developer will identify trainers capable of delivering the modules to trainees throughout the lifetime of the programme.

4.7   The training modules to be delivered within the framework are detailed in Annex A. The training developer must:

4.7.1   Deliver all completed learning materials by 21 August 2017 (unless otherwise agreed with TNA).

4.7.2   Participate in fortnightly monitoring meetings with TNA's Head of Programmes (in person or by telephone) to review and discuss the progress and quality of the materials being designed, and attend two project board meetings (indicative dates May and August 2017) in person or by teleconference.

4.7.3 Inform TNA's Head of Programmes of any proposed subcontractors for writing content, before formalising agreements with these subcontractors (where these have not already been specified in the Tender Response).

5 PROJECT DELIVERABLES

The project must deliver:

5.1 A model job description for a Digital Archives Assistant, developed in consultation with sector employers for use as a reference model in developing the learning programme and more widely.

5.2 An overall learning programme for the traineeship, which ensures trainees will meet the model job description at the end of their traineeships, and which takes account of:
   a. The Qualifications and Credit Framework Level 4 provisions;
   b. The Archives and Records Association (ARA)'s Framework of Competencies (see Annex A for details), including the potential for trainees to receive an ARA-recognised qualification at the end of their training experience; and
   c. Best-practice in the development of apprenticeship standards.

5.3 In-person training materials (e.g. PowerPoint, workshop handouts, workshop activities, workbooks) suitable for a one-day training workshop to introduce each module topic, key tools, challenges and applicable standards in each topic area.

5.4 Workplace and reference training materials for use in practical learning, consolidating formal training and ensuring that trainees are supported to develop their skills in a variety of host archive situations.

5.5 A list of suggested trainers for delivery of each in-person training workshop. TNA anticipates that trainers will be paid a daily rate of approximately £400-500, and that each module (see Annex A) will be required to be taught twice (once each in 2 locations) during each cohort year.

5.6 Trainees should benefit from an expert training experience, ensuring that they complete their traineeships with skills, experience and knowledge making them highly employable in the archives sector.

6 BUDGET

6.1 The maximum budget available for this project is £25,000, inclusive of VAT, travel and expenses. The training developer may decide to use elements of this budget to subcontract as necessary.

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

7   HOW TO RESPOND

7.1   Tender Responses should be submitted to procurement@nationalarchives.gsi.gov.uk by **5pm on 7 April 2017**.

7.2   Please respond by supplying the following information:

      7.2.1   Your understanding of the project brief and deliverables.

      7.2.2   Your experience in developing training programmes, including engaging with employers. If you have already identified sub-contractors whom you wish to engage, you should detail their relevant experience.

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

      7.2.4   Your proposed methodology to address all of TNA's requirements. If you have already identified sub-contractors whom you wish to engage, you should detail their relevant experience.

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

      7.2.6   An assessment of the key risks, and mitigations which you would put in place, to ensure delivery of the project processes and reports, to a standard acceptable to TNA.

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

7.3   Any requests for clarification should be submitted to procurement@nationalarchives.gsi.gov.uk by **12 noon on 22 March 2017**.

8 EVALUATION CRITERIA

8.1 Tender Responses will be evaluated using the following criteria:

CATEGORY	MAXIMUM AVAILABLE SCORE	MAXIMUM AVAILABLE WEIGHTED SCORE
Understanding of the brief and deliverables (Section 7.1.1)	10	20
Relevant experience (Sections 7.1.2 and 7.1.3)	10	20
Methodology and timetable (Sections 7.1.4 and 7.1.5)	10	30
Identification of risks and mitigations (Section 7.1.6)	10	20
Costs (Section 7.1.7)	10	10

8.2 For each Category (apart from Cost, see Section 8.3 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.

8.3 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.

8.4 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 7.1.1)	10	15
Relevant experience (Sections 7.1.2 and 7.1.3)	10	15
Methodology and timetable (Sections 7.1.4 and 7.1.5)	10	25
Identification of risks and mitigations (Section 7.1.6)	10	15
Costs (Section 7.1.7)	10	10
Interview	10	20

9   PROCUREMENT PROCESS

The Procurement Timetable is as follows:

Ref.	Description	Date
1	Invitation to Tender published	Monday 13 March 2017
2	Deadline for Potential Suppliers to submit clarification questions to procurement@nationalarchives.gov.uk	12 noon, Wednesday 22 March 2017
3	Deadline for TNA to respond to clarification questions*	Monday 27 March 2017
4	Deadline for Potential Suppliers to submit their Tender Responses to procurement@nationalarchives.gov.uk	5pm, Friday 7 April 2017
5	Timebox for TNA to evaluate Tender Responses, including possible telephone interviews with Potential Suppliers	10 April 2017 to 19 April 2017
6	Contract award and feedback to unsuccessful Potential Suppliers	Friday 21 April 2017

10   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.

ANNEX A: INFORMATION ON MODULES

Modules will be delivered through at least one in-person training opportunity, plus a module workbook or other means of ensuring trainees have a structured means of acting on the training in the workplace, with suitable reference materials. The modules should demonstrate a consistent approach to support trainee learning throughout their traineeships. Trainees will work in a variety of different host archive services, with different systems and ICT restrictions; workplace activities should not be system-dependent.

All modules should introduce key principles, tools and standards on the subject, and support this with activities embedding understanding through practical experience. They should incorporate opportunities to understand where good practice is still developing and where theory and practice may not fully align.

Training developers are not expected to develop assessment tools. Assessment will be through a portfolio submitted at Foundation level for the ARA's Continuing Professional Development programme. All competencies are derived from ARA's Competency Framework: http://www.archives.org.uk/careers/continuing-professional-development.html. A complete and successful portfolio at Foundation level contains 8 credits, with a minimum of 2 credits from each competency area (A, B, C) and at least four credits demonstrating competency at level 2.

Module 1: Introduction to the Archives Sector and Archives Management Principles

This module should cover:
- Understanding the principles of archives management: analogue and digital
- Understanding the structure of the archives sector

After completing this module, trainees should be able to reach at least level 1 in the following competencies, with a particular focus on digital records. Please specify in your response which level you anticipate aiming to reach for each competency:
- *A2 Developing and using policies and procedures*
- *A8 Contributing to/understanding internal/external professional environments*
- *B6 Archival collections management*

Module 2: DIGITAL ACQUISITION

This module should cover:
- Working with external and internal depositors to accession records in formats that can be accessed and preserved
- Selecting digital records

After completing this module, trainees should be able to reach level 2 in the following competencies, with a particular focus on digital records:
- *B7 Acquiring and accessioning archival records in all formats*
- *B8 Appraising and selecting archival records in all formats*

Module 3: DIGITAL PRESERVATION

This module should cover:
- Assessing institutional readiness for digital preservation
- Ensuring the longevity and integrity of digital materials
- Identifying risks to preservation, whether systemic, media/format-based or file-level
- Understanding metadata for preservation

After completing this module, trainees should be able to reach level 2 in the following competencies, with a particular focus on digital records:
- *B11 Preservation management: assessing needs*
- *B14 Digital curation: preserving born-digital (and digitised) records and archives*

Module 4: DIGITAL ACCESS

This module should cover:
- Understanding metadata for access
- Providing access securely and within legal frameworks

After completing this module, trainees should be able to reach level 1 or level 2 in the following competencies, with a particular focus on digital records. Please specify which:
- *B9 Arranging and describing archives*
- *B10 Providing access to and retrieving archives*
- *C5 Providing intellectual access to the content of records and archives*

Module 5: DIGITAL ENGAGEMENT

This module should cover:
- Developing tools and activities to ensure widespread access to digital materials
- Using digital methodologies to reach broad audiences to engage with archives, including analogue collections highlighted through digital means

After completing this module, trainees should be able to reach level 1 or level 2 in the following competencies, with a particular focus on digital records and methods:
- *C2 Planning and delivering activities to meet the needs and wants of internal and external users/stakeholders*
- *C7 Developing and sustaining local/virtual user and community networks*
- *C9 Undertaking marketing, advocacy and outreach activities to reach new communities, inform employers and other stakeholders*