The National Archives

THE NATIONAL ARCHIVES

DIGITAL ENGAGEMENT TOOLKIT FOR THE ARCHIVES SECTOR WORKFORCE

INVITATION TO TENDER – OPEN COMPETITION

DEADLINE FOR TENDER SUBMISSIONS – 5PM (UK TIME), 2 AUGUST 2021

1   ABOUT US

1.1   The National Archives 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   The National Archives' long-term strategy, [Archives For Everyone](), commits us to lead the archives sector to fulfil the vision set out in the strategic vision for archives, [Archives Unlocked](), promoting our shared values of trust, enrichment and openness. It also sets out our aim to lead the world in reimagining archival practice for the 21st century, pioneering new and ethical approaches to appraisal and selection, description, digital preservation and access.

1.4   Plugged In Powered Up is our digital capacity building strategy that sets out an ambitious plan of programmes, training and resources to support the archives sector meet its digital ambitions, spread across the themes of Access, Engagement and Preservation. It sets out a plan for three business years of work and will be delivered from 2019 to 2022.

2   PURPOSE

2.1   This invitation to tender specifies our requirements for provision of the following services:

- Develop a Digital Engagement Toolkit that will gather together useful existing resources to provide practical guidance for practitioners to improve social media impact and support digital storytelling.

2.2   Digital engagement is the process by which archives are made interesting and relevant to diverse audiences through the use of technology. Social media is a constituent of this work but any interactive or interpretive layer on top of records (beyond simply cataloguing) is a form of digital engagement.

2.3   The huge diversity of digital channels and platforms available is an opportunity to consider carefully the desired audience and carefully match intentions and outcomes to platform features, norms and audiences. Online communities offer huge opportunities for archives to broaden their audience and digital engagement can and should be an opportunity to attract a new digitally literate audience from both a repository's immediate physical locality and anywhere else that interest in their records may reach. By participating in digital initiatives, archives can reach individuals who can work with their collections in ways which might be completely new.

3   REQUIREMENTS, OBJECTIVES AND DELIVERABLES

3.1   Project deliverables are:

3.1.1   **Produce a toolkit comprising a set of guides covering the main tools and platforms that can be used for digital engagement**. Engaging audiences with cultural heritage content online has been rapidly developing over the last decade, with more innovative tools continuing to be released allowing new ways of presenting and engaging with content. Some tools, such as Facebook and Twitter, are already very well established in the archives sector but there is a need for practical guidance that illustrates the range of tools and platforms on the market that can be utilised for presenting content online. The toolkit will support archives to help them understand what tools can be used to engage audiences and will show examples of successful implementations of using the digital tools.

For the toolkit, we would expect to see the following tools and platforms included:
- Audio (Podcasts etc.)
- Crowdsourcing
- Digital exhibitions
- Events and livestreaming
- Maps
- Social media
- Blogging
- Instagram
- Tiktok
- Twitter
- Facebook
- Video (YouTube etc.)

Key considerations for the guides:
These guides must focus on the consumers of digital content. Archives have a variety of audiences, some well-established and some new and relatively untouched. As well as a focus on the tool or platform practitioners can use

to present content, we want to focus on the intended audiences and will expect to see the following included in the Toolkit:

- A classification of tools and platforms by audience – who is likely to engage with the content via a specific delivery method (i.e. blog, Instagram or YouTube video)
- What are key considerations and barriers to think about for specific audience types and can content be repurposed onto different platforms to reach different audiences?
- A focus on accessibility and how archivists can create online content that is accessible for all audiences
- Some discussion of metrics for each tool/platform and how impact is conventionally demonstrated

3.1.2 **Produce a decision map/matrix to complement the Toolkit**
- This would help to quickly signpost the archivist to a particular tool/piece of guidance that most suits their needs.

3.2 Outcomes of the work:
- To give archive practitioners practical guidance and examples of how to use digital tools and platforms to engage audiences.
- To provide a framework that supports and enables archive practitioners to increase their digital skills and confidence with digital engagement work.

3.3 The anticipated work plan is as follows:
- Background research to identify existing tools, guides and examples of digital engagement, and to understand how far these meet archives sector workforce needs.
- Pilot a small number of toolkit guides with Digital Archives Learning Exchange members to ensure they are at a suitable level to support sector skills. TNA will work with the Appointed Supplier to facilitate these pilots.
- Create the full suite of Toolkit guides in a style and at a level which directly engages with the needs of the archives sector workforce.
- Produce guides to the requirements of The National Archives website. Guides to be produced in Word with basic formatting,

including all hyperlinks and any images, screenshots or videos to be used in the Toolkit to support us publishing them as webpages.

3.4   Use of the work:
The Digital Engagement Toolkit will be an online resource promoted across the archives sector in England. As one of several workstreams in the Digital Capacity Building Programme it will:
- Support the members of the Digital Archives Learning Exchange in building their skills.
- Be promoted by TNA for wider archives sector skills development.
- Have benefit in the wider cultural heritage sector.

3.5   The work is to be completed by **15 January 2022**.

3.6   The maximum available budget for this contract is £16,500 excluding VAT but including all travel and other expenses.

4 HOW TO RESPOND

4.1 If you have any clarification questions related to your Tender Response, please submit these to procurement@nationalarchives.gov.ukby 5pm (UK time) on 14 July 2021.

4.2 Please submit your Tender Response to procurement@nationalarchives.gov.uk by 5pm (UK time) on 2 August 2021.

4.3 It is for you to determine what format your Tender Response should take so as to describe your offer in a clear, comprehensive fashion. However please ensure your Tender Response includes as a minimum:

- Your **understanding** of the project and deliverables;

- Details of your prior **experience** suited to this project, including understanding of sector-related guidance and standards;

- Your proposed **methodology and timetable** for delivery of the project outcomes;

- Names and experience of the **individuals** you will assign to the project, and their involvement with each phase of unit of the work;

- Your **contract price**, including breakdown of costs for each phase or unit of work, day rate for each team member and other costs or expenses.

5 **EVALUATION CRITERIA**

5.1   Your Tender Response will be evaluated using the following criteria:

Category	Maximum pre-weighted score	Weighting	Maximum weighted score
1. Extent to which proposal demonstrates an understanding of the brief	10	1.5	15
2. Knowledge and experience relevant to the project, including understanding of the specific needs of the archive sector	10	2.5	25
3. Quality of methodology and experience in relation to desk-based research and stakeholder engagement	10	2.5	25
4. Names and experience of individuals assigned to the project, and their involvement with the development of training materials and training delivery.	10	1.5	15
5. Contract price	10	2	20

5.2   Price scores will be based on a comparison between each Supplier's price offer, based on the percentage difference from the lowest bid price. The lowest offered price will receive the maximum pre-weighted score of 10 points, a price which is 20% higher will receive a score of 8 (ie the maximum score minus 20%).

5.3   Other categories will be evaluated according to the table below:

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
4 Points	**Average:** • 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 has some 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	**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

5.4   Following this evaluation, TNA reserves the right to interview a number of Potential Suppliers (we anticipate no more than 4) and/or to request examples of your work, and/or to take references. This additional information will then be considered among the other Quality elements when making a contract award decision.

6   PROCUREMENT TIMETABLE

6.1   The procurement timetable is as follows:

Ref.	Description	Date
1	Invitation to Tender published	1 July 2021
2	Deadline for Potential Suppliers to submit clarification questions to procurement@nationalarchives.gov.uk	5pm (UK time) 14 July 2021
3	Deadline for Potential Suppliers to submit Tender Responses to procurement@nationalarchives.gov.uk	5pm (UK time) 2 August 2021

*   *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 TERMS

7.1 The contract will be awarded subject to our standard terms and conditions, which can be found here.

7.2 TNA reserves the right not to award and to complete its objectives through other means.