

THE NATIONAL ARCHIVES

**DEVELOPMENT OF TRAINING RESOURCES FOR DIGITAL PRESERVATION IN THE
ARCHIVE SECTOR**

INVITATION TO TENDER – OPEN COMPETITION

DEADLINE FOR TENDER SUBMISSIONS – 12 NOON (UK TIME), 18 OCTOBER 2019

1 BACKGROUND

- 1.1 The National Archives (TNA) is the official archive of the UK government and for England and Wales, making available to the public a vast collection of historical records dating back over 1,000 years. TNA is also an Independent Research Organisation (IRO) and research is at the heart of what we do, both to address the challenges and opportunities of digital, but also to research into the intellectual and material content of our historical records in order to enhance access to our collections. More information on TNA can be found at www.nationalarchives.gov.uk.
- 1.2 The Archive Sector Development department (ASD) is responsible for leadership of the archive sector in England, comprising over 2500 archives. Our work is framed by the new strategic vision, Archives Unlocked. Our approach to the leadership role is a collaborative one, supporting partnership working to encourage a sustainable and innovative archive sector <http://www.nationalarchives.gov.uk/archives-sector/projects-and-programmes/strategic-vision-for-archives/>

2 THE PROJECT

2.1 The 'Novice to Ninja' capacity building stream is designed to provide an online development pathway which will guide new starters (novices) and intermediate practitioners towards expert (ninja) status in implementing digital preservation for archives.

2.2 We are seeking a supplier to deliver the following:

- **Draft a training pathway with supporting materials for novice and intermediate digital preservation practitioners to develop practical preservation skills for born-digital records.**

Evidence of sector skills and capacity (JISC/TNA survey 2018) shows that although awareness of the need to preserve born-digital materials is high, the theory widely accepted, and plenty of guidance has been published, many practitioners still lack the confidence to undertake active preservation actions. Archive services unable to purchase proprietary systems have often struggled to make use of freely available open-source tools as an alternative. These tools are often not supported with guidance designed for the non-IT professional, which has proved to be a real barrier to use and to building confidence. The sector needs practical reference tools to support them moving into active preservation work. We would like to focus on skills and tools at the Practitioner level of DigCurV, rather than management skills.

- **Create a logical flow of training and supporting materials, designed to improve skills at both novice and intermediate digital preservation practitioner level.**

Ensure that there is a skills-building pathway so that practitioners can easily understand their increasing capacity to capture, preserve and provide access to digital records. Although skills development is the key goal, the learning should also explicitly build practitioner confidence. It should present digital preservation as a process, not simply as a system, and emphasise that it can be effectively progressed without acquiring a single integrated preservation system. In designing the pathway, it would be useful for practitioners to be able to drop-in on support for understanding specific tools, as well as following a full learning pathway.

- **Offer a range of learning experiences, probably including video/audio tutorials, exercises, quick reference checklists and tips.**

The experience of providing guidance to the archives sector in this area shows that flat text reference materials are well provided, and under-used. Novice to Ninja should aim to move on from this style of guidance to an interactive learning offer, with a range of ways to learn. Users should have opportunities to validate their learning, perhaps through quizzes and/or mapping to the ARA competency framework and/or other opportunities to demonstrate visually that they have progressed.

- **Engage with related work-streams and projects in the Digital Capacity Building Programme to present a coherent approach.**

These work-streams and projects are specified in 'Use of the work' (section 2.4).

2.3 **Learning objectives:** Participants who follow the complete Novice to Ninja pathway will:

- Understand the core principles of digital preservation and how these can be practically applied

- Have hands-on experience and confidence to use a range of digital preservation tools
- Be able to apply the knowledge gained practically in their own place of work
- Be able to work through a process from acquisition/ingest through storage and metadata retrieval to providing access to born-digital collections using relevant tools
- At the novice-to-intermediate level be able to deliver the above at least for small discrete collections; at the intermediate-to-ninja be moving towards delivery at scale, more complex file / data types, and towards working with digital archives as mainstreamed business as usual.

2.4 **Use of the work:** The Novice to Ninja pathway will be an online resource promoted across the archives sector in England. As one of several work-streams in the Digital Capacity Building Programme it will:

- Dovetail with and to an extent parallel the intensive on-site teaching experience provided to novice practitioners through 'Archive School' (5 modules covering file profiling, format research, metadata and extraction tools, storage risk assessment and access). Tools demonstrated include DROID, Python, CSV validator, Apache Tika, HexEditor, TeraCopy and access tools tbc. The initial cohort will be around 15 students and the programme will be delivered at Kew over 5 months.
- Handouts developed for Archive School dovetail with and to an extent parallel the Workflows and Architecture stream, which will research and publish some real-world case studies of archive services using a workflow of multiple open-source tools to create a preservation system. Ideally, all tools identified in the Novice to Ninja stream will be represented in the Workflows and architecture content but this latter digital guidance will be much less detailed than Novice to Ninja and consequently be able to give an overview of a wider range of tools and approaches.
- Support the members of the Digital Archives Learning Exchange (DALE) and Bridging the Digital Gap trainees in building their skills. The former is a network of archives professionals with an interest in digital work meeting quarterly. The latter is an HLF funded scheme for widening participation in the archive sector and is formed of explicitly digital specialists. The current cohort are in post until autumn 2020 and will be followed by a further cohort.
- Be promoted by TNA for wider archives sector skills development – it must be openly accessible for sector benefit.

2.5 The work must be completed by 31 March 2020.

2.6 The maximum available budget for this project is £50,000, excluding VAT but including all other expenses.

3 METHODOLOGY AND DELIVERABLES

- 3.1 We believe the methodology for delivering this requirement should include gap analysis, pathway drafting and resource creation, including:
- Background research to identify existing tools and supporting documentation, and to understand how far these meet archives sector workforce needs (including DPC, JISC and Bridging the Digital Gap training content)
 - Create a pathway for skills development from novice via intermediate to ninja skill status, with suggested learning content
 - Liaise (via The National Archives lead) with other work-stream content providers to ensure parallel coverage of key tools and topics
 - Pilot a small number of learning resources with DALE members and/or Bridging the Digital Gap trainees to ensure they are at a suitable level to support sector skills.
 - Create the full suite of new learning resources in a style and at a level which directly engages with the needs of the archives sector workforce.
 - Identify a suitable hosting option for the resources, whether with DPC, JISC, The National Archives website/Moodle or other suitable location which directly meets sector needs.
- 3.2 The Digital Archives Learning Exchange (DALE) can provide a forum for some of the sector capacity understanding, and act as a sounding board to ensure the final product delivers something tangible for the sector. Bridging the Digital Gap trainees, who have technical skills on appointment, may be a forum for testing tools and provide feedback at a more technically skilled level. The National Archives lead can put contractors in touch with relevant contacts.
- 3.3 The outcomes to be delivered by this requirement are to encompass “digital preservation” as a practical, implemented skillset:
- Training and supporting materials which cover implementing the range of core activities for digital preservation, perhaps using the ‘Organisational activities’ section of the Digital Preservation Handbook to ensure structured coverage of activity areas from creation to metadata and access. The aim should be to integrate support and use of tools such as those identified in ‘Technical solutions and tools’, into this structure, to bring the processes to life. Another supporting option may be to use structures in Bridging the Digital Gap preservation training modules as a framework for learning.
 - A wider sense of how these practical activities fit into institutional implementation, such as having a digital preservation policy and handbook, may be woven in and learners may be directed to resources on these areas. There may also be references to the wider standards landscape to help learners to understand how their activity supports overall institutional progress. These elements should be presented as contextual, rather than the core aspects of Novice to Ninja learning.
 - The work may also air the question of how much of this activity sits with archivists and how much can/should become part of ICT delivery. This will vary by organisation and level of support, but could usefully build archives’ confidence in what they can seek external support with.

- Supporting materials will include some newly-created content such as audio, video and blog posts, but should also incorporate existing resources where these already provide practical learning which meets sector needs.

5 HOW TO RESPOND

- 5.1 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 addresses **as a minimum**:
 - 5.1.1 Your **experience** in meeting similar requirements, particularly in the archive or heritage sector(s);
 - 5.1.2 The **named individuals** you will assign to this project, with their CVs and/or work histories;
 - 5.1.3 Your proposed **methodology** and **timeline** for delivering against the requirements;
 - 5.1.4 Your **total contract price**, which must be inclusive of all travel and other expenses.
- 5.2 If you have any clarification questions related to your Tender Response, please submit these to procurement@nationalarchives.gov.uk by **5pm (UK time) on 9 October 2019**.
- 5.3 Please submit your Tender Response to procurement@nationalarchives.gov.uk by **12 noon (UK time) on 18 October 2019**.

6 EVALUATION CRITERIA

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

Category	Maximum pre-weighted score	Weighting	Maximum weighted score
Quality (Sections 5.1.1 to 5.1.3 of your Tender Response)	10	8	80
Price	10	2	20

6.2 TNA reserves the right to shortlist an envisaged maximum of 3 Potential Suppliers to be invited for interview. After those interviews, those invited Potential Suppliers will then be re-scored, as above, but taking the interview into account as part of the overall Quality category.

6.3 Price scores will be based on a comparison between each Potential 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%).

6.4 The Quality category will be evaluated according to the table below:

10 Points	Outstanding: <ul style="list-style-type: none">• 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 which add significant value to the project.
7 Points	Good: <ul style="list-style-type: none">• 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 which may add some value to the project
4 Points	Average: <ul style="list-style-type: none">• Potential Supplier has provided a response that addresses some parts of the requirement

	<ul style="list-style-type: none"> • 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, and/or has failed to demonstrate any value added to the project.
1 Point	<p>Poor:</p> <ul style="list-style-type: none"> • 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, and/or has failed to demonstrate any value added to the project.

7 PROCUREMENT TIMETABLE

7.1 The procurement timetable is as follows:

Ref.	Description	Date
1	Deadline for Potential Suppliers to submit clarification questions to procurement@nationalarchives.gov.uk *	5pm 9 October 2019
2	Deadline for Potential Suppliers to submit Tender Responses to procurement@nationalarchives.gov.uk	12 noon 18 October 2019
3	Timebox for evaluation of Tender Responses, including shortlisting for interview stage	21-23 October 2019
4	Timebox for interviews (if required)	24-25 October 2019
6	Contract award	Week commencing 28 October 2019
7	Project completion	31 March 2020

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

8 CONTRACT TERMS

- 8.1 The contract will be awarded subject to our standard terms and conditions, which can be found [here](#).
- 8.2 TNA reserves the right not to award and to complete its objectives through other means.