



**INVITATION TO TENDER**

**WORKFORCE DEVELOPMENT STRATEGY**

**CLOSING DATE FOR TENDER RESPONSES - 12 NOON, FRIDAY, 15 SEPTEMBER 2017**

## **1 PURPOSE**

- 1.1. The purpose of this Procurement Process is for The National Archives (TNA) to select a Supplier to scope and create a workforce development strategy for TNA's Archives Sector Development department.
- 1.2. The outcome will be a comprehensive workforce development strategy for use across the entire archives sector in England.

## 2 BACKGROUND

- 2.1 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. 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.
- 2.2 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.
- 2.3 Workforce development is a core priority identified by Archives Unlocked, with an ambition to foster a skilled, diverse, flexible and confident workforce.
- 2.4 Across the archives, information, heritage and culture sectors, there is currently a strong focus on workforce development. Major strategies and programmes are being developed to ensure we have a workforce across these sectors that is fit for the future. Core themes that these initiatives share include diversity, opening up new entry and progression routes, fostering new skills – especially digital – and building confident leadership. This presents many opportunities for an archive workforce development strategy to work in alignment with other initiatives to the benefit of our relatively small and specialist sector.
- 2.5 In 2015, CILIP (Chartered Institute of Library and Information Professionals) and ARA (Archives and Records Association) published a major workforce mapping study. <https://www.cilip.org.uk/about/projects-reviews/workforce-mapping>
- 2.6 The study looked at the workforce across libraries, archives and records, information and knowledge management. Findings from the survey revealed issues including low ethnic diversity, gender pay gaps, and limited range of formal qualifications. The mapping provides a useful baseline and identifies areas for future workforce development initiatives.
- 2.7 In the wider landscape in which archives work, key workforce development initiatives are happening across the libraries, information, heritage and culture sectors. These include:
- ◇ Libraries Taskforce, public libraries skills strategy that will:
    - a. promote leadership at every level of the workforce
    - b. support delivery of outstanding customer service
    - c. explore continuing development for all library workers
    - d. look at how to attract and retain the best talent
    - e. understand and plan for the learning and development needs of all – library workers, volunteers and key stakeholders
  - ◇ Arts Council England strategies to ensure the leadership and workforce in the arts, museums and libraries are diverse and appropriately skilled

- ◇ The Culture White Paper set out an ambition to ensure there should be better access to skills development and clearer pathways for talent.  
[https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/510799/DCMS\\_Arts\\_and\\_Culture\\_White\\_Paper\\_Accessible\\_version.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/510799/DCMS_Arts_and_Culture_White_Paper_Accessible_version.pdf)
- ◇ The Heritage Lottery Fund has conducted research on the heritage workforce. Its Skills for the Future programme helps organisations deliver paid training placements to meet skills shortages in the heritage sector and to help diversify the workforce.  
<https://www.hlf.org.uk/looking-funding/our-grant-programmes/skills-future>
- ◇ Institute for Apprenticeships: leadership body for development of new apprenticeship standards across all occupations.  
<https://www.gov.uk/government/organisations/institute-for-apprenticeships>

2.8 TNA, Archives and Records Association and other strategic bodies have been leading a range of workforce development initiatives for the archives sector. However, to date they have not been designed as part of a comprehensive strategy, but have been delivered as stand-alone activities. Key initiatives include:

- ◇ Bursaries for attendance at conferences and to complete archives courses.
- ◇ Traineeships.
- ◇ Apprenticeships.
- ◇ Volunteering strategy and training.
- ◇ Disability employment.
- ◇ Sponsorship of places on the Clore leadership programme.

### 3 REQUIREMENT

- 3.1 TNA seeks to commission a piece of work to scope and create a workforce development strategy for the archives sector. Delivery of the strategy will be led by TNA as archives sector lead, in collaboration with a network of partners across the information, culture and heritage sectors.
- 3.2 The project will create a workforce development strategy with a framework of programmes to be delivered over the following four years. This strategy will be created by:
- ◇ Identifying a model for a diverse, skilled, flexible and confident workforce to capitalise on the opportunities set out in [Archives Unlocked](#).
  - ◇ Benchmarking the current workforce against this model, and identify key challenges, barriers and opportunities for development.
  - ◇ Drafting a framework of a limited number of workstreams or core programmes to support workforce development.
  - ◇ Identify existing and planned initiatives across the information, culture and heritage sectors that we could work with, and identify potential partner bodies and funders.
- 3.3 The strategy will address these issues throughout:
- ◇ Recruitment, entry and progression routes.
  - ◇ Diversity (especially cultural and socio-economic diversity).
  - ◇ Skills development and talent retention.
  - ◇ Leadership.
  - ◇ Volunteers – as an enhancement to the paid workforce.
- 3.4 The strategy will focus on the needs of the wider archives sector, taking account of the wide variation in scale between archives, and the variety of parent bodies they work within (including public sector, academic, business, charities and private bodies). It will also place TNA within the strategy, as the largest archive employer in the country with a role of piloting and testing workforce development approaches.
- 3.5 We envisage that the project will be delivered through desk research and consultation with the archives sector, workforce development experts and potential partners and funders. Consultation may include surveys, targeted interviews, workshops, round tables and expert panels.
- 3.6 The project deliverables are:
- ◇ A model for a diverse, skilled, flexible and confident workforce to capitalise on the opportunities set out in Archives Unlocked.
  - ◇ A background research report setting out the context for archive workforce development, the challenges and opportunities.
  - ◇ A strategy document, setting out a framework of core programmes over the following four years, including identification of potential partnerships, funders and collaborations.

The National Archives will work with the contractor to establish a steering group to support this piece of work.

## **4 BUDGET**

- 4.1 The maximum available budget for this project is £20,000 (**inclusive** of VAT), including all travel and other expenses.
- 4.2 TNA will provide or pay for venues and catering for meetings integral to the work, subject to prior agreement.
- 4.3 TNA will also provide some administrative support for consultation events, including communications with the sector and partners, subject to prior agreement.

## 5 HOW TO RESPOND

- 5.1 If you have any clarification questions related to your response, please submit these to [procurement@nationalarchives.gsi.gov.uk](mailto:procurement@nationalarchives.gsi.gov.uk) by 12 noon, Friday 18 August 2017.
- 5.2 Please submit your response to [procurement@nationalarchives.gsi.gov.uk](mailto:procurement@nationalarchives.gsi.gov.uk) by 12 noon, Friday 8 September 2017.
- 5.3 It is for you to determine what format your submission should take so as to describe your offer in a clear, comprehensive and convincing fashion; however, you should note that the information you supply may 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.
- 5.4 Your response should include the following:
- 5.4.1 Your **understanding** of the project and deliverables.
- 5.4.2 Details of your prior **experience** suited to the project, including understanding of workforce development programmes, policy and strategy.
- 5.4.3 Your proposed **methodology** for delivery of the project outcomes.
- 5.4.4 Names and experience of **individuals** assigned to the project, and their involvement with each phase or unit of the work.
- 5.4.5 **Costs** – including breakdown for costs of each phase or unit of work, day rate of each team member and other costs or expenses.

## 6 PROCUREMENT TIMETABLE

Ref.	Description	Date(s)
1	Deadline for Potential Suppliers to submit clarification questions to <a href="mailto:procurement@nationalarchives.gsi.gov.uk">procurement@nationalarchives.gsi.gov.uk</a>	12 noon, Friday 18 August 2017
2	Deadline for TNA to respond to clarification questions*	Friday, 25 August 2017
3	Deadline for Potential Suppliers to submit their Proposals to <a href="mailto:procurement@nationalarchives.gsi.gov.uk">procurement@nationalarchives.gsi.gov.uk</a>	12 noon, Friday 8 September 2017
4	Deadline for TNA to evaluate Proposals and identify preferred Supplier	Friday, 15 September 2017
5	Contract award	Monday, 18 September 2017

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

## 7 EVALUATION CRITERIA

Tender submissions will be evaluated using the following criteria:

CATEGORY	MAXIMUM AVAILABLE SCORE	WEIGHTING	MAXIMUM AVAILABLE WEIGHTED SCORE
1. Your understanding of the project and deliverables (Section 5.4.1)	10	2	20
2. Details of your prior experience suited to the project, including understanding of workforce development programmes, policy and strategy.(Section 5.4.2)	10	2.5	25
3. Your proposed methodology for delivery of the project outcomes (Section 5.4.3)	10	2.5	25
4. Names and experience of individuals assigned to the project, and their involvement with each phase or unit of the work (Section 5.4.4)	10	2	20
5. Costs (Section 5.4.5)	10	10	10
<b>TOTAL</b>	<b>50</b>	<b>-</b>	<b>100</b>

For each of **Categories 1, 2, 3, and 4**, a pre-weighted points score of 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 Response 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.

<b>10 Points</b>	<p><b>Very Good:</b></p> <ul style="list-style-type: none"> <li>• Potential Supplier's Submission exceeds TNA's expectations.</li> <li>• Potential Supplier has provided high-quality, compelling and convincing evidence to support all elements of their Submission.</li> <li>• Potential Supplier has submitted a Submission which is highly relevant to the Requirement.</li> <li>• Potential Supplier's Submission 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><b>Good:</b></p> <ul style="list-style-type: none"> <li>• Potential Supplier's Submission meets TNA's expectations.</li> <li>• Potential Supplier has provided evidence to support most elements of their Submission. The evidence supplied is good and relevant to the Requirement.</li> <li>• Potential Supplier has submitted a Submission which is highly relevant to the Requirement.</li> <li>• Potential Supplier's Submission 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><b>Average:</b></p> <ul style="list-style-type: none"> <li>• Potential Supplier's Submission only partly meets TNA's expectations.</li> <li>• Potential Supplier has provided evidence to support only some elements of</li> </ul>

	<p>their Submission. The evidence supplied has only some relevance to the Requirement.</p> <ul style="list-style-type: none"> <li>• Potential Supplier's Submission 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><b>Poor:</b></p> <ul style="list-style-type: none"> <li>• Potential Supplier's Submission fails to meet TNA's expectations.</li> <li>• Potential Supplier has provided little or no evidence to support most elements of their Submission.</li> <li>• The evidence supplied is weak and has limited relevance to the Requirement.</li> <li>• Potential Supplier's Submission 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>

For **Category 5**, the lowest priced submission will be awarded the maximum score available. All other bids will be awarded the same maximum score reduced by the proportion by which they are more expensive.

## **8 CONTRACT TERMS AND CONDITIONS**

The contract shall be governed by the short form conditions for services published [here](#).

Please note that the information you supply in your tender response may be used, in whole or in part, to populate the Contract. As such, please 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.