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Tender

## Physical Records Management Digital Solution

Historic England

F02: Contract notice

Notice identifier: 2024/S 000-003541

Procurement identifier (OCID): ocds-h6vhtk-0436d0

Published 2 February 2024, 1:45pm

### Section I: Contracting authority

#### I.1) Name and addresses

Historic England

The Engine House Fire Fly Avenue

Swindon

SN2 2EH

#### Email

[Procurement-HE@HistoricEngland.org.uk](mailto:Procurement-HE@HistoricEngland.org.uk)

#### Country

United Kingdom

#### NUTS code

UK - United Kingdom

#### Internet address(es)

Main address

<https://historicengland.org.uk/>

### **I.3) Communication**

The procurement documents are available for unrestricted and full direct access, free of charge, at

<https://in-tendhost.co.uk/historicengland.aspx/Home>

Additional information can be obtained from the above-mentioned address

Tenders or requests to participate must be submitted to the above-mentioned address

### **I.4) Type of the contracting authority**

Body governed by public law

### **I.5) Main activity**

General public services

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## **Section II: Object**

### **II.1) Scope of the procurement**

#### **II.1.1) Title**

Physical Records Management Digital Solution

Reference number

P/REF 00000265

#### **II.1.2) Main CPV code**

- 72310000 - Data-processing services

#### **II.1.3) Type of contract**

Services

#### **II.1.4) Short description**

Background1. Historic England (the Authority) uses a legacy software application (TRIM version 7) for the management of non-electronic physical records. Physical records managed in TRIM range from documents of historical significance to business and personnel paper records.2. TRIM has been through several iterations of product identity and original ownership since first implemented, prior to the establishment of Historic England, for English Heritage. The version currently in service has been end of sale and out of vendor support for nearly a decade. Historic England wishes to replace the functionality offered by TRIM through implementing a modern and fully supported digital solution that addresses operational risks and issues associated with continuing to run an obsolete and unsupported system.3. This requirement relates solely to the management of physical records. While it is known that some candidate digital solutions also offer such functionality, management of electroni

### **II.1.5) Estimated total value**

Value excluding VAT: £85,000

### **II.1.6) Information about lots**

This contract is divided into lots: No

## **II.2) Description**

### **II.2.2) Additional CPV code(s)**

- 48612000 - Database-management system
- 72313000 - Data capture services
- 72312000 - Data entry services
- 72317000 - Data storage services
- 72320000 - Database services
- 72300000 - Data services

### **II.2.3) Place of performance**

NUTS codes

- UK - United Kingdom

### **II.2.4) Description of the procurement**

1. Historic England (the Authority) uses a legacy software application (TRIM version 7) for the management of non-electronic physical records. Physical records managed in TRIM

range from documents of historical significance to business and personnel paper records.

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3. This requirement relates solely to the management of physical records. While it is known that some candidate digital solutions also offer such functionality, management of electronic records is not in scope and does not require discussion.

Objectives and Desired Outcomes

4. Objectives of the work are:

- a. The contract with the successful supplier to implement and provide the digital solution commences April 2024.
- b. The solution is live by July 2024 and continues until April 2028.
- c. Support and operation of the solution is transitioned to business-as-usual by September 2024.

5. The outcomes that Historic England wishes to realise are:

- a. Physical records are managed using a solution with full original vendor support until at least April 2028.
- b. Historic England provides first and second-line support. The successful supplier will provide third-line support.
- c. Users are trained, familiar, and at ease with using the solution.
- d. The solution enables the use of TRIM in Historic England to be discontinued and IT assets associated with TRIM to be decommissioned.

Scope

6. Within the successful supplier's scope in this engagement will be:

- a. A digital solution to manage physical records.
- b. Technical implementation of the solution.
- c. Migration of data from the legacy TRIM application to the new solution.
- d. Post-migration data validation.
- e. Provision of user guidance and any necessary training materials.
- f. Early-life support following release to live.
- g. Support for the solution for the duration of the contract period.

7. Outside of the successful supplier's scope of work will be any decommissioning of existing IT assets.

Constraints

8. Constraints on the solution are:

- a. The solution must be capable of single sign-on using credentials from the Historic England Azure Active Directory.
- b. The successful Tenderer must hold valid Cyber Essentials certification for the duration of the contract.
- c. Data must be hosted in the UK or European Economic Area only.

Assumptions

9. Assumptions made at this stage are:

- a. A commercial off-the-shelf solution will meet most of Historic England's requirements, and all those marked as mandatory, with no, or minimal, modifications.
- b. Supplier support for implementation and operation will be available for the duration of the contract.
- c. Classification of information stored in the solution will be no higher than OFFICIAL-SENSITIVE and the successful supplier and solution will have suitable technical and procedural controls to protect this information (refer to appendix 4.3 for guidance).
- d. The successful supplier will, as part of their bid, offer a service to automate and manage the migration of all required data from TRIM to the new solution, including post-migration validation of data.

Technical & Delivery Strategy

10. An 'off the shelf' software-as-a-service solution that benefits from standard service and support is preferred, if one can be found that satisfies all mandatory requirements. If a suitable off-the-shelf solution cannot be found, the next preferred option will be to modify an off-the-shelf product. Development of a bespoke software application, that would require special

### **II.2.5) Award criteria**

Price is not the only award criterion and all criteria are stated only in the procurement documents

### **II.2.7) Duration of the contract, framework agreement or dynamic purchasing system**

Start date

1 April 2024

End date

31 March 2028

This contract is subject to renewal

No

### **II.2.10) Information about variants**

Variants will be accepted: Yes

### **II.2.11) Information about options**

Options: No

### **II.2.13) Information about European Union Funds**

The procurement is related to a project and/or programme financed by European Union funds: No

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## **Section III. Legal, economic, financial and technical information**

### **III.1) Conditions for participation**

#### **III.1.1) Suitability to pursue the professional activity, including requirements relating to enrolment on professional or trade registers**

List and brief description of conditions

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ownership since first implemented, prior to the establishment of Historic England, for English Heritage. The version currently in service has been end of sale and out of vendor support for nearly a decade. Historic England wishes to replace the functionality offered by TRIM through implementing a modern and fully supported digital solution that addresses operational risks and issues associated with continuing to run an obsolete and unsupported system.<sup>3</sup> This requirement relates solely to the management of physical records. While it is known that some candidate digital solutions also offer such functionality, management of electronic records is not in scope and does not require discussion.

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**Technical & Delivery Strategy**<sup>10</sup>. An 'off the shelf' software-as-a-service solution that benefits from standard service and support is preferred, if one can be found that satisfies all mandatory requirements. If a suitable off-the-shelf solution cannot be found, the next preferred option will be to modify an off-the-shelf product. Development of a bespoke software application, that would require special

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## Section IV. Procedure

### IV.1) Description

#### IV.1.1) Type of procedure

Open procedure

#### IV.1.8) Information about the Government Procurement Agreement (GPA)

The procurement is covered by the Government Procurement Agreement: No

### IV.2) Administrative information

#### IV.2.2) Time limit for receipt of tenders or requests to participate

Date

1 March 2024

Local time

11:59pm

#### IV.2.4) Languages in which tenders or requests to participate may be submitted

English

#### IV.2.7) Conditions for opening of tenders

Date

1 March 2024

Local time

11:59pm

Place

Suppliers interested in this opportunity should register at <https://intendhost.co.uk/historicengland.aspx/Home> in order to express interest and download documentation.

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## **Section VI. Complementary information**

### **VI.1) Information about recurrence**

This is a recurrent procurement: No

### **VI.4) Procedures for review**

#### **VI.4.1) Review body**

Historic England

Swindon

Country

United Kingdom