

# JOINT INFORMATION SYSTEMS COMMITTEE (JISC)

## INVITATION TO TENDER

### JISC Film and Sound Think Tank Videos and Audio Podcasts

#### Introduction

1. The JISC invites tenders to produce a series of short videos and audio podcasts to support and disseminate the work of the JISC Film and Sound Think Tank.
2. Funding of between £40,000 and £45,000 (including VAT, travel and subsistence) is available for this work.
3. The deadline for proposals is 12 noon on **Thursday 30<sup>th</sup> April 2009**.
4. It is envisaged that bidders will be notified of the outcome of the evaluation process by **15<sup>th</sup> May 2009**.
5. The successful bidder will be expected to start work by the end of **May 2009**.
6. The work must be completed by mid-July 2010.

#### Background

7. The JISC is a joint body of the UK Higher and further Education Funding Councils. It was established to support the further and higher education sectors in the use of information communications technology (ICT). It does this by providing a network service and by funding ICT development and services that support learning, teaching and research.
8. The JISC wishes to commission this work to support the JISC Strategy in:
  - innovative and sustainable ICT infrastructure, services and practice that support institutions in meeting their mission;
  - continuing to improve its own working practices.
9. The JISC has convened a Film and Sound Think Tank (the terms of reference and membership are attached at **Appendix C**). The JISC and its Film and Sound Think Tank requires short stimulus videos and audios to be presented at Think Tank meetings, and video and audio reports for dissemination after each Think Tank meeting.
10. The briefs for the short stimulus videos/audios are as follows:
  - **Highlights Showreel**  
This is a video brochure for our Think Tank, an audiovisual mapping of JISC investment in audio visual collections, in the context of increasing access to archives. The showreel will kick off a discussion about how to market JISC audio visual initiatives and collections.

- **Primary Sources**  
Discovering the educational value of documentary rushes, outtakes, long-form interviews and b-roll. The video/audio will stimulate discussion of how to acquire, store and retrieve this content.
  - **Using Video and Sound Case Studies**  
Video/audio portraits of faculty use of video and sound in teaching and research.
  - **Rights Case Studies**  
Case studies of rights clearances, starting with Wellcome Trust Library's efforts to clear assets for Creative Commons-style reuse, and including experiences from the Open University.
11. The brief for the video or audio dissemination reports is as follows:
- Short (5 minute) video or audio podcast 'highlights' reports for each Think Tank meeting for distribution via our wiki, website and YouTube site. There are two meetings scheduled in 2009 and two in 2010.
12. Some useful links to relevant JISC funded and other work are as follows:
- JISC promotional films on YouTube  
(<http://www.youtube.com/user/JISCmedia>)
  - Alternative 2008 and 2007 short films about education today:  
(<http://www.youtube.com/user/mwesch>)
  - Short 2008 film promoting Creative Commons in filmmaking:  
(<http://creativecommons.org/videos/media-that-matters>)
  - Short 2009 film promoting video and education:  
(<http://www.intelligenttelevision.com/news/project/opencast/>)

## **Process**

13. The work will be undertaken in four stages:
- **Stage One**  
Development of a production plan to fulfil this entire commission.
  - **Stage Two**  
Researching archive material and case studies for approval.
  - **Stage Three**  
Production of rough cuts for approval.
  - **Stage Four**  
Production of final approved videos or audios to meet delivery deadlines.

## **Conduct of the Work/Methodology**

14. The JISC will steer the production in consultation with the JISC Film and Sound Think Tank. The successful bidder will be expected to work with Think Tank

members to ensure it has access to all appropriate archives and other relevant collections and to share the deliverables in stages 1-4 on a regular basis.

15. The final deliverables will be broadcast quality videos or audio podcasts with all of their component elements cleared for all uses across all platforms in accordance with the Creative Commons licence. All rights clearances will need to be documented and the associated documentation and all original source materials supplied with final delivery of the film.

### **Outputs and Timetable**

16. The work should commence in May 2009 and be completed by mid-July 2010.
17. The main deliverables will be (lengths are approximate):
  - A short (5 minute) Highlights Showreel drawing on the JISC audio visual collections and the timeline of access to UK audio visual archives, with a first version to be delivered by mid-June 2009.
  - A short (3 minute) video or audio case study of the use of audio visual content in higher education across different disciplines to be delivered by mid June 2009.
  - Three short (5 minute) video or audio case studies of rights clearance strategies for the use of audio visual content in formal and informal learning to be delivered by early October 2009.
  - Four short (5 minute) video or audio podcast reports of Think Tank meetings in 2009 and 2010 to be delivered in mid-July 2009, mid-November 2009, mid-April 2010 and mid-July 2010.
  - All video to be delivered as QuickTime file and H.264 file for showing on screen, online and on mobile devices. All associated documentation including shooting scripts and rights clearance forms and source materials including full interviews and archival film and photos must be delivered to the JISC with final delivery.
18. The successful bidder will be expected to communicate with JISC and the Film and Sound Think Tank via email and to post work in progress online for review. The successful bidder must also attend face to face meetings as appropriate.

### **Terms and Conditions**

19. JISC' standard terms and conditions of funding can be found at [http://www.jisc.ac.uk/fundingopportunities/bidguide/proj\\_tocgrants.aspx](http://www.jisc.ac.uk/fundingopportunities/bidguide/proj_tocgrants.aspx). Bidders must review these prior to submitting a proposal. The terms and conditions must be followed by all project holders.
20. For studies and reports commissioned by JISC, any information gathered during the course of the activity and not already in the public domain is deemed to be the property of HEFCE on behalf of the JISC. The information provided in the final report and the rights to all other outputs shall become HEFCE/JISC property.

## JISC Management of the Project

21. The project will be overseen by Catherine Grout, e-Content Programme Director ([c.grout@jisc.ac.uk](mailto:c.grout@jisc.ac.uk); 0203 006 6058) based in the London office and the co-chairs of the Film and Sound Think Tank, Paul Gerhardt ([paul.gerhardt@ARCHIVESFORCREATIVITY.COM](mailto:paul.gerhardt@ARCHIVESFORCREATIVITY.COM)) and Peter B Kaufman ([pbk@INTELLIGENTTV.COM](mailto:pbk@INTELLIGENTTV.COM)).
22. The successful bidder will be expected to follow the normal JISC project management guidelines <http://www.jisc.ac.uk/fundingopportunities/projectmanagement.aspx> including adhering to good project management practices, regular reporting and participation in meetings as appropriate. Bidders are advised to view these prior to submitting a proposal.

## Funding Available

23. Funding of between £40,000 and £45,000 is available for this piece of working including all travel and other expenses and any VAT applicable. Bidders should ensure they charge VAT for the proposed activity if required; JISC does not recover VAT. VAT should be charged at the applicable rate at the time of bidding; any increases to VAT rates will be honoured by JISC.

## Costing and Pricing a Proposal

24. All bids submitted by UK higher education institutions should use the Transparent Approach to Costing (TRAC) methodology in order to cost the activity. An example budget and guidance on the budgetary terms used can be found at **Appendix A** to this document.
25. Bidders should then consider how they wish to price the activity (by considering the level of institutional contribution) in order to submit a competitive bid.
26. Other institutions and organisations submitting bids should use their usual costing and pricing practices, but all costs should be clear and transparent, clarifying the number of days each individual working on the activity will provide, in order to assist the evaluators in determining the value for money of a proposal.

## Structure of Proposals

27. A guide to bidding for JISC projects can be found at <http://www.jisc.ac.uk/fundingopportunities/bidguide.aspx>.
28. Tenders should include:
  - a completed cover sheet (**Appendix B**). The completed cover sheet will not count towards the page limit;
  - a description of the proposed work;

- a detailed programme of the work to be undertaken, including a work plan showing key date/milestones and deliverables;
- a summary of relevant experience and technical knowledge to undertake the work proposed;
- short descriptions of key personnel who would work on the activity, including relevant experience and qualifications;
- an assessment of risks associated with the work and how these will be managed;
- the total cost and a breakdown of costs across academic years (August-July) including a statement on VAT.

29. Tenders should clearly demonstrate:

- An understanding of the area;
- A realistic understanding of the scale of the work;
- The methodologies to be adopted;
- Clear outputs and deliverables;
- An appropriate mix of skills for the project;
- The risks associated with the work have been considered;
- Clear, easy to understand costs for the project, with a clear rationale/breakdown of costs provided.

### **Evaluation Criteria**

30. The proposals will be evaluated by an evaluation panel appointed by the JISC.

31. Evaluation criteria, in no particular order, to be used to evaluate the proposals are as follows:

- Understanding of the issues;
- Relevant experience and track record;
- Feasibility of approach and timescale;
- Risk assessment and management;
- Value for money;
- Creativity.

### **Legal Requirements**

32. Potential bidders should be aware that as a public body, JISC is subject to legislation such as the Race Relations Amendment Act, 2000, Equality Act 2006 and the Disability Discrimination Act 2005 (see <http://www.hefce.ac.uk/lgm/divers/>). JISC is also subject to the Data Protection Act 2003 and the Freedom of Information (FOI) Act 2000. JISC requires any potential bidder to be aware of and abide by these regulations.

33. Any information that a bidder considers to be commercial in confidence will need to be put into a separate annex in the tender submission. JISC may still be obliged to make this information available if challenged. All tender submissions other than information in this annex will be deemed to be disclosable under FOI Act. However, JISC would never disclose any information during the actual tendering process, to avoid any prejudice to this process.

## Submitting a Proposal

34. The deadline for receipt of submissions is 12 noon on 30<sup>th</sup> April 2009. Bids should be sent to [a.mcallister@jisc.ac.uk](mailto:a.mcallister@jisc.ac.uk). Late proposals will **NOT** be accepted. It is the responsibility of the bidder to ensure that the proposal has arrived by the deadline stated.
35. Tenders should be no longer than 10 single-sides of A4 pages (including any confidential annexes) and should be typeset in Arial or a similar font at a minimum of 11-point size. **Any bids exceeding the ten-page limit will be rejected by the Executive prior to the evaluation stage.**
36. **An electronic copy of the proposal should be received in PDF format by the deadline.** This is an electronic-only submission process; therefore, all documentation (including the covering letter) must be submitted in PDF format, **as a single file and in a zipped folder if the size of the file exceeds 10Mb** (note: any files exceeding 10Mb are likely to be returned by the mail server).

## Award of Contract

37. A selection panel will be established to review the bids received. JISC's procedure for evaluating bids can be found at <http://www.jisc.ac.uk/fundingopportunities/bidguide/bideval.aspx>.
38. It is anticipated that bidders will be notified of the outcome of this tender exercise by 15<sup>th</sup> May 2009. The successful bidder will be expected to start work by the end of May 2009.
39. JISC will expect to work with the successful bidder to agree the workplan. The JISC shall determine the profile of payment to the successful bidder(s), once appointed.
40. The JISC shall be under no obligation to accept the lowest, or any tender, and tenders shall submit offers on the basis of so doing at no cost to the JISC.

## Further Information

41. Further background information can be found at **Appendix C**.
42. General enquiries about this tender should be addressed to Catherine Grout (email: [c.grout@jisc.ac.uk](mailto:c.grout@jisc.ac.uk); Tel: 0203 006 6058).
43. Enquiries regarding the submission of bids should be addressed to Avalon McAllister (email: [a.mcallister@jisc.ac.uk](mailto:a.mcallister@jisc.ac.uk); Tel: 0117 9317124).

**JISC Executive  
March 2009**

## Appendix A

### Example Budget for Tenders Submitted by UK HEIs<sup>1</sup>

<b>Directly Incurred Staff</b>	<b>May 09 – July 09</b>	<b>August 09 – July 10</b>	<b>TOTAL £</b>
Post, Grade, No. Hours & % FTE	£	£	£
Etc.	£	£	£
Etc.	£	£	£
<b>Total Directly Incurred Staff (A)</b>	<b>£</b>	<b>£</b>	<b>£</b>
<b>Non-Staff</b>			
<b>Non-Staff</b>	<b>May 09– July 09</b>	<b>August 09– July 10</b>	<b>TOTAL £</b>
Travel and expenses	£	£	£
Hardware/software	£	£	£
Dissemination	£	£	£
Evaluation	£	£	£
Other	£	£	£
<b>Total Directly Incurred Non-Staff (B)</b>	<b>£</b>	<b>£</b>	<b>£</b>
<b>Directly Incurred Total (A+B=C) (C)</b>	<b>£</b>	<b>£</b>	<b>£</b>
<b>Directly Allocated</b>			
<b>Directly Allocated</b>	<b>May 09–July 09</b>	<b>August 09– July 10</b>	<b>TOTAL £</b>
Staff	£	£	£
Estates	£	£	£
Other	£	£	£
<b>Directly Allocated Total (D)</b>	<b>£</b>	<b>£</b>	<b>£</b>
<b>Indirect Costs (E)</b>	<b>£</b>	<b>£</b>	<b>£</b>
<b>Total Project Cost (C+D+E)</b>	<b>£</b>	<b>£</b>	<b>£</b>
<b>Amount Requested from JISC</b>	<b>£</b>	<b>£</b>	<b>£</b>
<b>Institutional Contributions</b>	<b>£</b>	<b>£</b>	<b>£</b>
<b>Percentage Contributions over the life of the project</b>	<b>JISC X %</b>	<b>Partners X %</b>	<b>Total 100%</b>

<sup>1</sup> See overleaf for an explanation of the terms directly incurred, directly allocated and indirect costs.

## Explanation of Terms

All applications from UK HE institutions for development funding from JISC should be costed on the basis of full economic costs (fEC). fEC is the total cost of a project.

Projects should be costed using the TRAC Research indirect and estates charge-out rates, and TRAC fEC methods for Research. If a project is not classified as Research under annual TRAC the Research charge-out rates should still be used. However, there is no need to amend the denominator or the numerator of the charge-out rate calculations to try to incorporate these projects.

Further guidance on fEC for JISC-funded research and development projects can be found at: <http://www.jisc.ac.uk/fundingopportunities/bidguide/fulleconomiccosting.aspx>.

## Cost Headings

### Directly Incurred

These are costs that are explicitly identifiable as part of the project, are charged at cash value actually spent and can be supported by an audit record. They include:

**Staff** – payroll costs requested for staff, full- or part-time, who will work on the project and whose time can be supported by a full audit trail during the life of the project. Academic-related staff who lead or work directly on a project should be classified as ‘researchers’ when costing the project and should be allocated indirect/estates costs. They should be included in the annual TRAC time allocation collection exercises when those are carried out, and their time on projects should be included in the denominator of the indirect and estates charge-out rate calculations when they are next calculated.

Unless a member of staff will be spending 100% of their time on a project, all estimates of time on a project should be made in numbers of hours or days, for each year of the project. This should then be converted to a FTE for use in calculating the indirect and estate costs charges.

**Travel and Expenses** – funds for travel and subsistence for use by staff who work on the project where these are required by the nature of the work. This should include attendance at programme meetings (two per year) and other relevant meetings dependent upon the project/programme.

**Equipment** – the cost of individual items of hardware or software dedicated to the project, including VAT, e.g. a computer for a newly recruited member of staff for the project.

**Dissemination** – the cost of any dissemination activities proposed for the project.

**Evaluation** – the cost of any formative or summative evaluation activities proposed for the project.

**Other Costs** – costs of other items dedicated to the project, including consumables, recruitment and advertising costs for staff directly employed on the project.

### Directly Allocated

These are the costs of resources used by a project, which are shared by other activities. They are charged to projects on the basis of estimates rather than actual costs and do not represent actual costs on a project-by-project basis. They include:

**Staff** – proposals will need to show the costs of any principal investigators/project directors and any co-investigators/co-directors if their time charged to the project is based on estimates rather than actual costs. This may also include the costs of technical and clerical staff, and if a project is buying a small amount of one or more of a person's time.

**Estates** – these costs may include building and premises costs, basic services and utilities, and any equipment maintenance or operational costs not already included under other cost headings.

**Other Directly Allocated** – these costs may include, for example, access to institutional research facilities such as equipment and IT systems.

#### Indirect Costs

These include non-specific costs charged across all projects based on estimates that are not otherwise included as Directly Allocated costs. They include the costs of administration, such as personnel, finance, library and some departmental services.

NB: Budgets should clarify the FTEs used to calculate the indirect and estates charges, and indicate which staff have been included.

#### **Indexation**

Costings for subsequent years should factor in inflationary increases for salaries and other costs. All costings should be inclusive of any VAT applicable.

#### **Project Partners**

Funding for project partners, e.g. staff time, should be clearly identified in the proposal under the relevant heading. Resources to be provided by project partners, whether cash or in-kind contributions, should also be clearly identified in the proposal.

#### **Justification of Costs**

All costs associated with the project must be fully justified.

#### **Virement**

Directly Incurred Costs can be vired within the overall Directly Incurred budget heading, however, Directly Allocated and Indirect Costs cannot (they do not vary from the estimates made on project application).

## Appendix B

*Cover sheet for proposals (all sections must be completed)*

### **JISC ITT: Film & Sound Think Tank Videos & Audio Podcasts**

Name of institution/organisation:
Project partners (if applicable):
Full contact details for primary contact: Name: Position: Email: Address:  Tel:  Fax:
Length of Project:
Project Start & End Dates:
Total Funding Requested from JISC:
Outline Project Description
Tick this box to indicate that this proposal has been approved by an appropriate member of the institution/organisation <input type="checkbox"/>

## Appendix C

### JISC Film and Sound Think Tank Terms Of Reference

#### Background

##### JISC Film and Sound activities

The JISC has been and continues to fund a number of online sound and video initiatives in collaboration with third parties. Historically, the JISC has funded the British Universities Film and Video Council (BUFVC) as a centre of expertise in the take-up and use of film and video within an academic context. The BUFVC lead the Managing Agent Advisory Service (MAAS) in the development of the Film and Sound Online collection and the digitisation of the NewsFilm Online materials. Other sound and video digitisation projects include the British Library Sound Archive (8,200 hours); British Film Archive (600 hours); and Bournemouth University IRN Archive (3000 hours).

Other activities have included the development of the VSM demonstrator project at Edina and smaller database augmentation within other archives. The JISC is aligned with the BBC through the Strategic Content Alliance and is scoping the CenturyShare initiative with other agencies.

##### Mission and role of F&S Think Tank

*The overall mission of the group is to advise the JISC on all issues relating to the creation, discovery, use, delivery and preservation of film and sound resources and to input to relevant strategic and policy areas.*

##### Scope

It would provide an essential sense of perspective from both the members of the JISC community and experts outside it on how the JISC might best move forward in this area, and how relevant projects and services might best develop.

The group would not be responsible for identifying and implementing a separate strategy to support this area as such but could help to identify gaps which could then assist in the formulation of an appropriate strategy/policy as required.

##### Think Tank Objectives

In the past ten years or so JISC has invested in a number of activities in the film and sound area

- Licensing of content and rights clearance
  - Provision of content (digitisation etc.)
  - Advice on how to use it
  - Projects looking at how you embed the content in learning and research
  - Resource discovery
  - JISC services involved in these activities represented today
1. The JISC would like to take stock of these activities and look at our approaches moving forward.

2. The JISC would like to understand these approaches in the context of broader developments (in technology) in policy and in the media industry. Where does the JISC work fit and how can we work in partnership with a range of organisations and individuals who also share our goal of ensuring that learners and researchers across the board can get the best out of film and sound content?
3. The JISC would also like to take the opportunity to think innovatively about the area and involve creative thinkers in exploring new approaches.

### **Think Tank Meetings**

Meetings of the Think Tank will focus around at least one major presentation, including new research where appropriate.

We hope that contributors to the Think Tank will take the opportunity to identify topics of particular interest and work with the organisers and joint chairs to research and present the findings.

Topics for discussion:

1. Review of rights, licensing and how they impact on educational use, including presentation of case studies and best practice guides.
2. Effective mechanisms for ensuring uptake and use of film and sound resources and for increasing usage. Including a review of awareness of JISC digitisation projects in film and sound. This project could involve the production of a presentation tape with advice on usage.
3. New film and sound production, particularly those involving open source technologies and new social networking distribution, including presentations of case studies and best practice guides.
4. Legacy, sustainability, and interoperability issues: a review of national and international strategies.
5. Developments in technical and resource discovery infrastructure. What editing, annotation and segmentation tools are needed to support access to this kind of content in the future? To include a technology update presentation, including the latest protocols e.g. VOIP, IPTV, PIP.
6. Quantifying the demand for moving image and sound. What content does our community require and how might this best be provided?
7. What kind of partnerships beyond the JISC community might be needed to ensure a sustainable future for access to these types of resources? How might we best engage with the range of experts and organisations working in this area?
8. Business models for film and sound collections and new productions, with particular reference to balancing public access with appropriate revenue streams.

9. Video and digital literacy needs and opportunities in Film and Sound education, including the development of tools, skills and sharing innovative output.
10. The strategic link-up for archives between Content, Preservation and Media Distribution. With the new UK Screen Heritage Strategy implementation plan coming out, this TT could discuss and comment on its recommendations.

## Membership

	Name	Organisation
<b>Co-Chairs</b>	Peter Kaufman	Intelligent TV
	Paul Gerhardt	Archives for Creativity
<b>Contributors</b>	Jason Da Ponte	BBC, Mobile technologies
	Tony Ageh	BBC, Controller of archive content
	Richard Paterson	BFI
	Luke McKernan	BL - Moving Images Curator
	Richard Ranft	BL - Head of the Sound Archive
	Jon Wardle	Bournemouth Media School
	Luís Carrasqueiro	Deputy Chief Executive, BUFVC
	Murray Weston	Chief Executive, BUFVC
	Christine Rees	Edina
	Rick Loup	Edina
	Paul Goodman	Head of Collections
	Michael Harvey	Curator of Cinematography
	Tom Loosemore	OfCom
	Celia Duffy	RSAMD
	Angela Saward	Wellcome Film Archive
	Jeremy Atkinson	University of Glamorgan
	Caroline Hart	ITN Source
	Karla Youngs	JISC Digital Media
	Sally Crompton	Director Multimedia, Open University
	Mike Flood Page	Illumina
	Adam Singer	Group Chief Executive, MCPS-PRS Alliance
	Gill Johnson	Arts Council England
	Andrew Law	Open University
	Tim Marshall	JANET Chief Executive
	Darius Cuplinskas	Soros Open Society Institute, Information Program
<b>JISC</b>		
JISC Collections	Liam Earney	JISC collections
JISC Executive	Catherine Grout (CG) chair	JISC e-content
	Lorraine Estelle	JISC collections

JISC Policy	Alastair Dunning (AD)	JISC digitisation
	Balviar Notay (BN)	JISC information environments
	Frederique van Till (FVT)	JISC e-research
	Hetesh Morar (HM)	JISC services
	Stuart Dempster (SD)	JISC content alliance
	Joanna Potter	JIR Secretary