

Line Gray

**Invitation to Tender**

**Technical Advisory Group**

**Framework**

Contract Ref: STA-0333

|  |  |
| --- | --- |
| **Name of bidding company / individual:** | [Please complete] |
| **Name of single point of contact:** |  |
| **Email address:** |  |
| **Phone number:** |  |
| **Postal address:** |  |

**1. INTRODUCTION**

**1.1 Purpose**

This Invitation to Tender (ITT) has been issued by the Standards and Testing Agency (STA) in connection with a competitive procurement exercise (Ref: STA-0333).

STA is looking to procure a pool of independent technical experts to provide expertise and considered advice to STA to ensure rigorous scrutiny of the technical aspects of the Assessment Research and Development division’s processes and procedures.

**1.2 Structure**

This document:

* sets out the context for the required services;
* outlines the planned procurement process; and
* contains a response section to evaluate the bidder's proposed response to STA's requirements.

**1.3 Disclaimer and conditions**

No information contained in this ITT or in any communication made between STA and any bidder shall be relied upon as constituting a contract, agreement, or representation that any contract will be offered.

STA reserves the right, subject to the appropriate procurement regulations, to change without notice the basis of, or the procedures for, the competitive process or to terminate the process at any time. Under no circumstances shall STA incur any liability in respect of this ITT, or any supporting documentation and STA will not reimburse any costs incurred by bidders or potential bidders in connection with preparation and/or submission of their responses.

The information contained within this document is confidential and should not be disclosed except for purposes related to its completion.

**1.4 Freedom of information and transparency**

STA is committed to open government and to meeting its legal responsibilities under the Freedom of Information Act 2000. All information submitted to a public authority may need to be disclosed by the public authority in response to a request under the Act. STA may also decide to include certain information in the publication scheme, which it maintains under the Act.

STA also has a commitment to the Government's transparency initiative relating to public sector suppliers, their transactions and their contracts. This includes:

* publication of Tender or Quote documentation;
* publication of financial transactions relating to expenditure with third parties; and
* publication of new contracts.

If a bidder considers that any of the information included in its response to this Invitation to Tender (ITT) is commercially sensitive, the information should be identified in the table below with an explanation of what harm may result from disclosure if a request is received, and the time period applicable to that sensitivity. Bidders should be aware that, even where they have indicated that information is commercially sensitive, STA might be required to disclose it under the Freedom of Information Act or as part of the Government's transparency arrangements.

|  |  |  |
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| Section | Commercial sensitivity | Time period |
|  |  |  |

**2. SPECIFICATION OF REQUIREMENTS**

**2.1 Overview**

STA will recruit technical experts specifically with knowledge and experience of Psychometric practices and methodologies.

**2.2 The Roles**

STA requires individuals with strong knowledge, expertise and working experience within the field of psychometric practices within the field of education.

The experts will be required to provide technical feedback and technical expertise on a number of operational queries, and research proposals on the aspects of the test development cycle. The experts may also be asked to share their expertise in specific areas more generally as well as in response to specific queries. Areas will include, but not be limited to, expertise in item response theory in an operational context, large-scale assessment with an emphasis on the analysis of matrix sampling methodology, performance assessment and conducting validity studies in an operational context.

STA will select the top 10 bidders based on the list of areas above. The decision will be based on evidence of these in the professional experience section of the Curriculum Vitae (CV) that bidders will be required to submit as part of this tender process.

We estimate that each person will be required between 1 - 5 days each year, although this may increase if we are not able to procure all the experts we require or if some are not available for review windows.

You will only be paid for the work that you complete and there will be a minimum expectation that you will complete between 1 - 5 days per year (subject to business need) as part of this contract (see section 2.4 for details).

The successful experts must:

* have strong knowledge, experience and expertise
* be flexible and available to review materials remotely in a secure location
* have the capacity to meet the requirements set out in this ITT.

**2.3 Department resources**

The successful bidders will be expected to work closely with:

* STA Psychometricians
* STA Project Managers
* STA Assessment Development Researchers
* STA Assessment Researchers
* STA Head of Assessment Research and Psychometrics.

**2.4 Specification of requirements**

We will contact all successful experts on the framework with general requests that adhere to the minimum acceptance criteria. This will include experience and evidence in the following areas:

* qualifications in areas of large-scale educational assessment, measurement or psychometrics;
* quantitative analytical experience, in a large-scale operational testing/assessment context;
* knowledge and operational experience with using R for psychometric analysis, and other psychometric software such as flexMIRT and Mplus;
* holds an active membership with a national and/or international professional organisation for education/assessment/research, such as The National Council on Measurement in Education (NCME), American Educational Research Association (AERA), International Test Commission, or Psychometrics Society.

For more specialised requests, work will be awarded to those who possess the necessary knowledge, skills and qualifications in the areas stated in, but not limited to the following bullets:

* setting and maintaining standards methodologies;
* item response theory in an operational context;
* assessment and analysis of matrix sampling methodology;
* performance assessment and conducting validity studies in an operational context;
* designing reliability studies;
* digital/computerised assessments.

In order to insure independent professional advice and avoid conflict of interest, additional work will be reviewed on a case-by-case basis and any stated conflict of interest will be avoided.

**2.5 Timescales**

The role will be for 2 years from 1st March 2025 – 1 March 2027.

Details of the specific dates will be outlined closer to the times when work is required.

**3. INSTRUCTIONS TO BIDDERS**

Bidders should read these instructions carefully as well as the Specification of Requirements section above (section 2) before completing the Tender documentation.

These instructions are designed to ensure that all Bidders are given equal and fair consideration. It is important therefore that you provide all the information asked for in the format and order specified.

The bidder shall not contact any other employee, agent, or consultant of STA regarding this procurement exercise during its duration, unless otherwise instructed by STA. Bidders are free to contact STA about unrelated matters, provided these do not impact the procurement exercise.

All material issued in connection with this ITT shall remain the property of STA and shall be used only for the purpose of this procurement exercise. Any confidential STA information shall either be returned to STA or securely destroyed by the bidder (at STA’s discretion) at the conclusion of the procurement exercise.

STA shall not be committed to any course of action as a result of:

* issuing this ITT or any invitation to participate in this procurement exercise;
* communicating with a bidder or a bidder’s representatives or agents in respect of this procurement exercise; or
* any other communication between STA (whether directly or by its agents or representatives) and any other party.

Bidders shall accept and acknowledge that, by issuing this ITT, STA shall not be bound to accept any application, and reserves the right not to conclude a contract for the services for which applications are invited.

STA reserves the right to amend, add to, or withdraw all or any part of this ITT at any time during the procurement exercise.

**3.1 Application validity**

Your application should remain open for acceptance for a period of 90 days from the submission date.

**3.2 Proposed contract**

This contract will be let under the terms and conditions of Framework Ref: STA - 0333. The contract will be for a period of 2 years. The following special terms will be applied:

* The parties acknowledge that, except for any information which is exempt from disclosure in accordance with the provisions of the Freedom of Information Act (FOIA), the contents of this Order are not Confidential Information. STA shall be responsible for determining at its absolute discretion whether any of the content of the Order is exempt from disclosure in accordance with the provisions of the FOIA.
* Notwithstanding any other term of the Order, the Contractor hereby gives consent for STA to publish the Order publicly in its entirety, including from time to time agreed changes to the Order, as well as payments made in accordance with the Order.

Bidders should set out below any concerns relating to the use of the Framework terms and conditions for this work, noting that STA gives no undertaking to agree to any changes.

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| **Contract Reference** | **Issue** | **Proposed mitigation** |
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A copy of the draft contract is included in Appendix 1 for your information.

**3.3 Procurement and delivery timescales**

The proposed procurement timetable is set out below:

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| **Date** | **Stage** |
| 29/11/2024 | ITT issued |
| 11/12/2024 | Deadline for clarification questions |
| 20/12/2024 | Deadline for submission of CVs |
| 17/02/2025 | Notification to successful suppliers |
| 01/03/2025 | Contract start date |

**3.4 Clarification questions**

Clarification requests should be submitted by e-mail only to: [TendersTD.STA@education.gov.uk](mailto:TendersTD.STA@education.gov.uk) and copied to [James.heathcote@education.gov.uk](mailto:James.heathcote@education.gov.uk). <mailto:>

In order to ensure equality of treatment of bidders, STA intends to publish the questions and clarifications raised by bidders, together with STA's responses (but not the source of the questions), to all participants at regular intervals along with this ITT and the proposed contract.

Bidders should indicate if a query is of a commercially sensitive nature – where disclosure of such a query and the answer would or would be likely to prejudice its commercial interests. However, if STA at its sole discretion does not either consider the query to be of a commercially confidential nature, or one which all bidders would potentially benefit from seeing, then STA will either:

* invite the bidder submitting the query either to declassify the query or allow the query, along with STA’s response, to be circulated to all bidders; or
* request the bidder, if it still considers the query to be of a commercially confidential nature, to withdraw the query.

STA reserves the right not to respond to a request for clarification or to circulate such a request where it considers that the answer to that request would be likely to prejudice its own commercial interests.

**3.5 Preparation of Curriculum Vitae**

Individual bidders are required to submit a CV. Please ensure the following sections are included in the CV:

* Contact details
* Educational background
* Professional experience including professional memberships
* Published work (peer reviewed and non-peer reviewed under separate headings).

Bidders are solely responsible for their costs and expenses incurred in connection with the preparation and submission of their application. Under no circumstances will STA, or any of their advisers, be liable for any costs or expenses borne by bidders, suppliers, or advisers in this process.

Bidders are required to complete and provide all information required by STA. Failure to comply with these requirements may lead STA to reject an application.

STA relies on bidders' own analysis and review of information provided.

**3.6 Confidentiality**

All information supplied by STA to bidders must be treated in confidence and not disclosed to third parties except insofar as this is necessary to obtain sureties for the purposes of submitting the tender.

All information supplied by bidders to STA will similarly be treated in confidence except for the disclosure of such information as may be required in accordance with the requirements of UK government policy on the disclosure of information relating to government contracts including the Freedom of Information Act.

**3.7 Conflict of interest**

Any conflicts of interest should be declared in the covering email when the bidders submit their CV.

When bidding for subsequent call offs again conflicts of interest should be declared. In order to insure independent professional advice and avoid conflict of interest, additional work will be reviewed on a case by case basis and any stated conflict of interest will be avoided.

**3.8 Daily rates and payment**

Payment for the work will be made using the daily rate of £700.

Travel and subsistence will be paid in line with government guidelines. For overnight stays accommodation will be paid for within the limits of government policy.

Applicants will be paid on the completion of the relevant work, and after a compliant invoice has been received. Details of a compliant invoice are contained within the contract. A non-compliant invoice will result in a delay in payment.

Please note that UK individuals will be taxed at source and VAT is not applicable.

**3.9 Submission of Curriculum Vitae**

Bidders must submit their CVs in electronic format using Microsoft Word (or equivalent) with their name in the document title.

CVs must be received by midday 20/12/2024 and should be sent to [TendersTD.STA@education.gov.uk](mailto:TendersTD.STA@education.gov.uk) and copied to [James.heathcote@education.gov.uk](mailto:James.heathcote@education.gov.uk).

CVs will be accepted at any time up to this deadline but will not be opened or evaluated until the deadline has passed.

Any CV received after the deadline may be rejected unless the bidder can provide irrefutable evidence that the application was capable of being received by the due date and time and that delivery failure was beyond their reasonable control.

**3.10 Right to reject/disqualify**

STA reserves the right to reject or disqualify a bidder where:

* the bidder fails to comply fully with the requirements of this ITT, including proper completion of the format for response, or is guilty of a serious misrepresentation in supplying any information required in this document; or
* there is a change in identity, control, financial standing, or other factor relating to the bidder that impacts on the selection and/or evaluation process.

**3.11 Debriefing**

Following the conclusion of the process, all unsuccessful bidders will have the opportunity of a debriefing. Unsuccessful bidders should notify STA by email that they wish to be debriefed. STA will aim to debrief unsuccessful bidders within 10 working days of receiving such a request.

**4. EVALUATION METHODOLOGY**

**4.1 Basis of award decision**

CVs will be evaluated in order to determine the most advantageous solution for STA.

The top 10 CVs that meet the quality threshold of will be added to the Technical Advisory Group Framework.

**4.2 Evaluation process**

CVs will be formally logged upon receipt. Any CVs that are received after the deadline may be rejected.

Following the deadline, a compliance check will then be conducted on all CVs that are received on time to determine whether they correspond to the CVs requirements. STA may reject any CV that does not comply with these requirements.

CVs will be evaluated solely on the responses and associated evidence provided by the bidder in the following sections of this ITT.

Technical evaluation   
CVs will be scored by an evaluation panel using the criteria set out below. The technical threshold for consideration to be part of the panel is a score of 5.

The method of scoring the evaluation sections will be a 0 - 1 and 0 - 3 point scale. Evaluators will use this to assign a score to each evaluation question response.

Educational background

Scoring 0-1

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| Score | Description |
| 1 mark | A score of 1 will reflect that the bidder has demonstrated a highly relevant educational background.  Examples of educational background being scored a 1 include a PhD in educational measurement or allied field, MSc/MA in educational statistics. |
| 0 marks | A score of 0 will reflect that the bidder has not demonstrated a relevant educational background or that the section is missing from the CV. |

Professional experience

Scoring 0-1

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| Score | Description |
| 1 mark | A score of 1 will reflect that the bidder has demonstrated highly relevant professional experience in the quantitative technical aspects of educational assessment.  An example of professional experience being scored a 1 would be operational experience in local, national or international summative assessment. |
| 0 marks | A score of 0 will reflect that the bidder has not demonstrated relevant professional experience in the quantitative technical aspects of educational assessment or that the section is missing from the CV. |

Active Membership

Scoring 0-1

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| Score | Description |
| 1 mark | A score of 1 will reflect that the bidder holds an active, current membership with a national and/or international professional organisation for educational measurement/assessment/research, such as The National Council on Measurement in Education (NCME), International Test Commission, Psychometrics Society or similar organisations |
| 0 marks | A score of 0 will reflect that the bidder has not demonstrated relevant membership or that the active membership section is missing from the CV. |

Published work

Scoring 0-3

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| Score | Description |
| 3 marks | A score of 3 will reflect that the bidder has had a substantial amount of work published in peer-reviewed journals specialising in educational measurement. |
| 2 marks | A score of 2 will reflect that the bidder has had some work published in peer-reviewed journals specialising in educational measurement. |
| 1 mark | A score of 1 will reflect that the bidder has published work that has not been through blind peer review. |
| 0 marks | Published work section is missing or not demonstrated in the CV. |

**4.3 Award decision**

CVs will be reviewed individually against the stated criteria. The top 10 bidders will be appointed on their ranked score.

**4.4 Allocation of Work**

The table in 2.4 sets out the minimum expectation of work and availability required from each successful bidder subject to business need.

For specialised call offs work requests will be circulated to those bidders who have evidenced the necessary skills and knowledge in their CV. Some work requests may require more than one expert, in which case STA will allocate accordingly.

All work requests/call offs will be allocated and agreed subject to conflict of interest declarations.

**4.5 Quality**

You will be expected to:

* Contribute fully and positively to the whole process and bring to bear your full breadth

of knowledge and understanding as a technical advisor.

* Prepare for, and attend all indicated meetings, and take a full and active role.
* Provide feedback within the agreed timeframe, that is fit for purpose and complies with the detail of the work request/call off.

A quality assessment will be carried out upon completion of each allocated piece of work. Experts who pass the quality assessment will be eligible for later allocation according to the expectations above. Quality assurance is required in order to ensure value for money. The level of quality assurance covered will be in proportion to the task to be carried out. Those who do not pass the quality assessment will no longer be eligible for later allocations.

**5. BIDDER’S RESPONSE**

Bidders to forward a copy of their CV.

**APPENDIX 1: DRAFT CONTRACT**

This draft contract document is for your information only. Successful bidders will be issued with contracts following the conclusion of the procurement process.

