

## Provision of Item Writing Services - Key Stage 2 English Reading Call-Off 02 Work Package 1 Contract

| Item Writing Services Framework Agreement – STA 0246 |   |
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| Call-Off Contract No:                                | STA-0246/02/01  |
| Title:   | Provision of Item Writing Services for Key Stage 2 English Reading Work Package 1 |
| Supplier:  | National Foundation for Educational Research (NFER)                               |

### Pursuant to the terms of the Item Writing Services Framework Agreement (STA 0246):

|  |                   |
|--|-------------------|
| Service Commencement Date:                         | 09 September 2024 |
| Call-Off Contract End Date:                        | 31 December 2024  |
| Call-Off Contract Value:                           | £93,418           |
| Relationship Manager for Department for Education: | ██████████        |
| Contract Manager for the Department for Education: | ██████████        |
| Relationship Manager for the Supplier:             | ██████████        |
| Contract Manager for the Supplier:                 | ██████████        |

### 1. Background

This call-off contract is let under the terms and conditions of the Item Writing Services Framework Agreement STA-0246 and is for the provision of item writing services for Key Stage 2 English Reading Work Package 1, Informal trialling of eight key stage 2 texts and a proportion of their associated items.

## 2. Functional Requirements

| Functional Requirements |   |
|-------------------------|---|
| Assessment type:        | National curriculum assessment – for pupils at the end of key stage 1 and key stage 2   |
|                         | <b>Work Package 1: Informal trialling of 8 KS2 texts and associated items</b>   |
|                         | <p>Work Package 1 consists of:</p> <ul style="list-style-type: none"><li>• informally trialling:<ul style="list-style-type: none"><li>○ three easy fiction KS2 texts and all associated items (approximately 30 marks' worth of items for each text that will include one and two mark items)</li><li>○ one mid non-fiction KS2 text and all associated items (approximately 40 marks' worth of items that will include one, two and three mark items)</li><li>○ four hard fiction KS2 texts and all associated items (approximately 30 marks' worth of items for each text that will include one, two and three mark items).</li></ul></li><li>• meeting to discuss findings and recommended changes to items</li><li>• submission of an informal trialling report, including findings and proposed amendments to the materials, no later than [REDACTED]</li></ul> <p>Items will be presented by STA in two separate sets or 'booklets' (to match the two versions of test booklets that will be taken to STA's first pre-test, the Item Validation Trial).</p> |

## Informal Trialling

The primary aim of informal trialling is to aid development of items and mark scheme development. The purpose is to gain first hand feedback on the language being used, area being assessed, and the

interpretation and understanding of the items by pupils and teachers<sup>1</sup>. Whether or not a pupil answers correctly is of secondary concern, rather that they understand what is being asked of them regardless of their answer.

Pupils should be of an appropriate age and overall should show the range of abilities expected at the end of the relevant key stage. It is expected that the sample used for informal trialling covers a wide range of geographical locations and pupil characteristics. The items should be discussed with pupils, in small groups of 4-6, and with teachers.

Suppliers should provide details of the volume of items they will be able to trial and provide detail of their trialling model to ensure items and mark schemes are improved or validated as a result of the trial.

Suppliers should also provide the following costs:

- Informal trialling – fixed costs

There is **no requirement to collect quantitative data**, such as facility values, as a result of this trial as the nature of the samples will not be representative. Any feedback from the trial will consist of qualitative data and evidence only. Recommended amendments to items should be made in line with STA's item writing guidance.

STA staff may wish to accompany the agency on a small number of visits to schools to observe.

Therefore, dates and locations of schools where trialling is taking place are to be provided to STA at least two weeks in advance of the first trial taking place.

Expected outputs from the trials should include:

- Child-level feedback from discussion in small groups with the administrator on their experience of the items and their level of understanding
- Teacher feedback on the same
- Details of suggested amendments to items and mark schemes as a result of the trials.

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| Qualitative feedback from the informal trial will be presented at the interim handover meeting within the Microsoft Word version of the mark scheme. |
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<sup>1</sup> People trialling items must have prior knowledge, preferably through previous involvement in item writing and development, but minimally through having reviewed and discussed the materials with STA.


### 3. Required Service Elements

The table below sets out the Service Elements and Deliverables the Supplier shall provide under this Call-Off Contract.


| No | Deliverables/Outputs   | Acceptance Criteria  | Due Date |
|----|--|--|----------|
| 1  | <p><b>Start-Up Meeting</b></p> <p>Supplier will provide:</p> <ul style="list-style-type: none"><li>• Detailed plan for informal trialling of texts and items, including proposed dates for any meetings outlined in this specification</li><li>• Detailed plan for when checkpoints will be held for review and joint sign-off</li><li>• Detailed project risk and issue log (Risk Log) for review and joint sign-off</li><li>• Project Initiation Document (PID).</li></ul> <p>STA will provide:</p> <ul style="list-style-type: none"><li>• Clarification of informal trialling requirements</li><li>• Materials (texts, items and mark schemes) to be informally trialled</li><li>• A template for the final informal trialling report.</li></ul> | <p>Project Director / Project manager (or equivalent) attend the Start-Up Meeting and provide listed documents by agreed date.</p> |          |

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| 2 | <b>Checkpoint Meetings and Management Information</b><br>To attend fortnightly checkpoint meetings, which may need to be more frequent at some stages of the project. These meetings will be held as telephone conference calls. Checkpoint reports to be submitted to STA two working days in advance of each Checkpoint meeting. | Project manager (or equivalent) attends each Checkpoint meeting on agreed date and submission of Checkpoint report two | Timing and frequency to be agreed at start-up meeting |
|---|--|--|---|

| No | Deliverables/Outputs  | Acceptance Criteria                                 | Due Date |
|----|---|---|----------|
|    | These checkpoints may cover details such as the progress of school recruitment, spread of school type and location/makeup of the sample, etc. | working days in advance of each checkpoint meeting. |          |

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| 3         | <b>Informal Trialling – Critical Step</b><br><p>Schools to be recruited for informal trialling according to the agreed criteria for the sample.</p> <p>Texts and items to be informally trialled in schools with specified number of pupils.</p> <p>Supplier to produce a report detailing the findings from informal trialling, using the agreed template. Any suggested amendments should be made in line with STA's item writing guidance (linked in document 5).</p> | <p>STA are notified of trialling locations two weeks before the start of the trial and are consulted re dates of visits to allow dates to be agreed that may enable STA staff to attend some visits.</p> <p>Texts and corresponding items trialled with specified number of schools and pupils.</p> | <p>To take place between steps 1 and 4</p>  |
| 4         | <b>Meeting to discuss findings of informal trialling (approximately 2 weeks after informal trialling has taken place)</b><br><p>Meeting with STA to discuss findings from informal trialling and the informal trialling report produced by the supplier.</p>   | <p>Project Manager to attend Interim Review meeting on agreed date and present key findings from informal trialling.</p>  |  |
| <b>No</b> | <b>Deliverables/Outputs</b>  | <b>Acceptance Criteria</b>  | <b>Due Date</b>   |



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|   | Meeting will be used to discuss key messages from informal trialling, any problems encountered, including any issues identified with items, and any recommended amendments to items. In the report the Supplier should say why an amendment has been suggested and what evidence there is for making the change.  |   |   |
| 5 | <p><b>Final Handover – Critical Step</b></p> <p>Supplier to hand over final informal trialling report electronically, using the DfE portal.</p> <p>Assignment / licences of IPR for DfE's benefit completed.</p> <p>If any errors are found following Final Handover or the materials are not compliant with this specification, all materials will be returned to the supplier for full checking and correction. Final payment will be withheld until this is completed. Fully checked and corrected materials must be returned no later than two weeks after the Final Handover date.</p> | <p>Final informal trialling report received at STA by agreed date.</p> <p>Report and recommendations are of appropriate quality as listed under Performance Requirements.</p> <p>Receipt of electronic materials specified and attendance at Final Handover meeting on agreed date ("Final Handover Date").</p> |  |

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#### 4. Performance Requirements

##### **Quality criteria: the final report must contain:**

- a clear, item-level summary of the findings from informal trialling
- child-level feedback from discussion in small groups with the administrator on their experience of the texts and items and their level of understanding • teacher feedback on the texts and items
- details of recommended amendments to items and mark schemes as a result of the trials, intended to improve item functioning.

##### **Accessibility:**

In planning and carrying out informal trialling, as well as when making any recommendations, the Supplier must take account of all current legislation in relation to equality of opportunity, including the specific duties under the Equality Act 2010 and any successor legislation.

##### **Security**

The Supplier and any sub-contractor must meet the following security requirements:

- The Supplier and any sub-contractor will comply with the STA's security procedures to maintain the integrity of all materials produced as outlined in the Item Writing Framework.

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- The Supplier and any sub-contractor shall ensure that it is with the SPF. The latest version being May 2018.  
<https://www.gov.uk/government/publications/securitypolicy-framework>
  - The Supplier and any sub-contractor shall ensure that it shall meet Government cyber essentials requirements.
  - Where any breach of security occurs, the Supplier must follow the STA security incident guidelines. All project team members and any other individual working on this project must be made aware of their obligations under the STA security policy.
  - All test materials are confidential. Pupil data is confidential. STA does not require that pupil data is collected as part of this project.
  - All files must be handled in a secure and confidential manner. Transmission of information regarding test materials via unsecured networks or email or by regular postal service is prohibited.
  - All staff working on the materials must sign a confidentiality agreement. Staff must work on these materials in a secure work area.
  - Handover forms to be used for all deliveries. Supplier to email to inform and confirm delivery.
  - See Test Development External Suppliers security policy document, as provided under the framework agreement.
  - Under no circumstances will the supplier and any sub-contractor contact IPR holders of any selected texts, images, or data. This is strictly prohibited.

## Security Compliance

Supplier and any sub-contractor must be compliant with all SPF requirements highlighted by STA Security. Where compliance has not yet been achieved an action plan and risk register must be agreed to address any issues identified within an acceptable timeframe.


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In the event that STA, in its sole discretion, considers that the required Security policies or processes have not been implemented by the Supplier and any sub-contractor prior to delivery of the Services, STA reserves the right to cancel any Order and/or terminate the Contract with immediate effect.

## 5. Key Milestones

| ID | Description | Key Milestone Acceptance Criteria | Completion Date | Evidence Required |
|----|-------------|-----------------------------------|-----------------|-------------------|
|----|-------------|-----------------------------------|-----------------|-------------------|

|   |                    |  |  |  |
|---|--------------------|--|--|--|
| 1 | Informal trialling | <p>Schools to be recruited for informal trialling according to the agreed criteria for the sample.</p> <p>Texts and items to be informally trialled in schools with specified number of pupils.</p> <p>Supplier to produce a report detailing the findings from informal trialling, using the agreed template. Any suggested amendments should</p> |  | Materials delivered on time and to standard. |
|---|--------------------|--|--|--|

|   |   |  |   |  |
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|   |   | be made in line with STA's item writing guidance (linked in document 5).   |   |  |
| 2 | Final acceptance and hard copy handover | <p>Supplier to hand over final informal trialling report electronically, using the DfE portal.</p> <p>Assignment / licences of IPR for DfE's benefit completed.</p> <p>If any errors are found following Final Handover or the materials are not compliant with this specification, all materials will be returned to the supplier for full checking and correction. Final payment will be withheld until this is completed. Fully checked and corrected materials must be returned no later than two weeks after the Final Handover date.</p> |  | Materials delivered on time and to standard. |

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## 6. Key Payment Milestones and Key Payment Milestones Dates

Payment will follow the completion of the KS2 English Reading Work Package 1 and upon receipt and acceptance of the informal trialling report.

| Milestone Payment | Requirement/Critical Steps | Payment Timescale | Amount £       |
|-------------------|----------------------------|-------------------|----------------|
| 1                 | Final acceptance (100%)    |                   | £93.418        |
| <b>Total</b>      |                            |                   | <b>£93.418</b> |

### TO NOTE:

- The total contract price is based on 8 KS2 Reading texts and 220 associated items being trialled. In the event that 100% of the items are not trialled, then, payment will be reduced on a pro-rata basis in accordance with Supplier calculations based upon the fixed and variable costs formula used to calculate the amounts in the Supplier's proposal for trialling of items.
- This work is VAT exempt.



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## 7. Contract Management Arrangements

The Supplier shall be fully engaged on an on-going basis in regular Contract Management Reviews relating to this Call-Off Contract and the overarching Framework Agreement. These reviews provide an opportunity for the Department and the Supplier to discuss the end-to-end delivery of the Services which shall include but not be limited to:

planning; progress; risk  
management; issue  
management;  
continuous  
improvement; proposed  
changes; lessons learnt;  
exit management.

Reviews will be carried out with Senior Management on a six month basis where the Department and the Supplier will meet to discuss Supplier performance, lessons learnt, continuous improvement, value for money, exit management and any other issues considered relevant by the Department.




## 8. Supporting documentation

The STA Item Writing Services Framework Call-Off 02 ITT sets out the full specification of requirements including the project deliverables, functional requirements, performance requirements and Security requirements. The original English Reading ITT and the supplier's response are appended to this contract document.

**In witness** whereof this Call-Off Contract has been duly executed.

Signed for and on behalf of the Supplier:

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| Signature: |  |
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|-------|-------------|
| Name: | <div></div> |
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|                   |              |
|-------------------|--------------|
| Role / Job Title: | <div></div>  |
| Date:             | Aug 21, 2024 |
|                   |              |

Signed for and on behalf of the Department for Education:

|                   |                 |
|-------------------|-----------------|
| Signature:        | <div></div>     |
| Name:             | <div></div>     |
| Role / Job Title: | Commercial Lead |
| Date:             | Aug 21, 2024    |

