



**Invitation to Tender**

**Braille Specialist Quality Assurance resource for the Standards and Testing Agency**

Contract Ref: STA-0230

|  |  |
| --- | --- |
| **Name of bidding organisation or individual** |  |
| **Name of single point of contact:** |  |
| **Email address:** |  |
| **Phone:** |  |
| **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-0230).

The purpose of this procurement is to provide Braille expert resource to support Quality Assurance processes within the STA in relation to modified Braille versions of key stage 1 and key stage 2 national curriculum tests. The national curriculum tests include the Year 1 Phonics Screening Check, English reading (key stage 1 and key stage 2), English grammar, punctuation and spelling (key stage 1 and key stage 2), mathematics (key stage 1 and key stage 2) and key stage 2 Science.

Government policy changes may bring other assessments within scope of any contracts awarded to successful suppliers.

**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 the STA's requirements.

**1.3 Disclaimer and conditions**

No information contained in this ITT or in any communication made between the STA and any Bidder shall be relied upon as constituting a contract, agreement or representation that any contract will be offered. The 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 the STA incur any liability in respect of this ITT or any supporting documentation and the 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**

The 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. The STA may also decide to include certain information in the publication scheme, which it maintains under the Act.

The 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, the STA might be required to disclose it under the Freedom of Information Act or as part of the Government's transparency arrangements.

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

**2. SPECIFICATION OF REQUIREMENTS**

**2.1 Overview**

 The STA is looking to recruit experienced Braille experts for quality assuring the modified Braille versions of the Key Stage 1 and Key Stage 2 National Curriculum tests to ensure:

* the accuracy and consistency within and across documents;
* the tests, transcripts and mark schemes reflect each other and are consistent;
* the materials conform to the style outlined; and
* the modified tests and guidance documents reflect and/or match the live tests, as appropriate.

The national curriculum tests include the Year 1 Phonics Screening Check, English reading (key stage 1 and key stage 2), English grammar, punctuation and spelling (key stage 1 and key stage 2), mathematics (key stage 1and key stage 2) and key stage 2 Science.

Government policy changes may bring other assessments within scope of any contracts awarded to successful suppliers.

We require the following Braille quality assurance resource for quality assuring modified Braille versions of national curriculum tests for the duration of this contract:

* 1 Braille expert for 2 days to quality assure the Year 1 Phonics screening check.
* 6 Braille experts for 2 to 8 days each to quality assure Braille versions of national curriculum tests in key stage 1 and 2 English Reading; key stage 1 and 2 English Grammar Punctuation and Spelling; key stage 1 and 2 Mathematics ; and, key stage 2 Science.

Please note that the requirements in relation to proofer numbers set out above are indicative at this stage. Work will be awarded subject to availability and number of proofers on the framework.

Those working on Braille proofing for year 1 and 2 tests (Key Stage 1) will need to be aware of Braille variants / practices suitable for children of that age.

Those working on Braille proofing for key stage 2 will need extensive knowledge of UEB conventions.

**2.2 The Braille Expert Proofing Role**

We are looking for individuals or organisations with excellent knowledge of contracted Braille (for key stage 2) and uncontracted Unified English Braille (for key stage 1) as well as experience of proofing complex Braille materials.

Specific subject knowledge is desirable but not essential. A good understanding of English reading / literacy, English grammar, punctuation and spelling, science or mathematics/ numeracy, including application of skills and use of data is advantageous to this role.

All Braille experts are expected to possess the essential skills of working methodically with excellent attention to detail. The ability to communicate effectively with various stakeholders, providing constructive feedback and suggesting solutions for any problems and/or issues identified is also essential.

**The successful Braille experts must:**

* Have experience of proof reading paper-based Braille materials;
* Have expertise in reviewing assessment materials;
* Be flexible and available to review materials in various locations as and when required in agreement with the relevant project team;
* Have the capacity to meet the requirement set out in this ITT; and
* Confirm that they are not working on the tests in any other capacity or if they are, they must provide additional information in the Further Information Section of this ITT.

A list of all the Key Stage 1 (KS1) and Key Stage 2 (KS2) modified National Curriculum test papers together with their format is provided in the table below.

|  |  |
| --- | --- |
| **Title** | **Format** |
| KS1 Phonics Screening Check | Uncontracted Unified English Braille (UEB) |
| KS1 English Reading Paper 1 Reading Prompt and Question Booklet | Uncontracted UEB |
| KS1 English Reading Paper 2 Reading Booklet | Uncontracted UEB |
| KS1 English Reading Paper 2 Reading Question Booklet | Uncontracted UEB |
| KS1 English GPaS Paper 2 Short answer questions | Uncontracted UEB |
| KS1 Mathematics Paper 1 Arithmetic | Uncontracted UEB |
| KS1 Mathematics Paper 2 Reasoning | Uncontracted UEB |
| KS2 English Reading Booklet | Contracted UEB |
| KS2 English Reading Question Booklet | Contracted UEB |
| KS2 GPaS Paper 1 Short Answer Questions | Contracted UEB |
| KS2 Mathematics Paper 1 Arithmetic | Contracted UEB |
| KS2 Mathematics Paper 2 Reasoning | Contracted UEB |
| KS2 Mathematics Paper 3 Reasoning | Contracted UEB |
| KS2 Mathematics Paper 2 Model Pack | Contracted UEB |
| KS2 Mathematics Paper 3 Model Pack | Contracted UEB |
| KS2 Science Sample Paper Biology | Contracted UEB |
| KS2 Science Sample Paper Chemistry | Contracted UEB |
| KS2 Science Sample Paper Physics | Contracted UEB |

Braille experts will be required to proof these test materials by working through the tactile Braille and comparing the content with the printed transcriptions (also supplied), and marking up any issues/queries to be fed back to the Modified Tests Project Manager. At the end of this document the annex titled “Annex A: Test Booklet and Mark Scheme Handover Process Checklist” provides some more detail of what is required as part of the Braille proofing check.

**2.3 Department resources**

The successful Bidders will be expected to work closely with:

* Relevant Test Development Researches; and
* Relevant subject / Modified Test Project Managers.

The Braille QA activity will take place either at the STA offices in London (Sanctuary Buildings, Great Smith Street, London, SW1P 3BT) or the STA offices in Coventry (Cheylesmore House, 5 Quinton Road, Coventry CV1 2WT).

**2.4 Timescales**

The role will be for two years (1 August 2019 to 31 July 2021) and successful applicants would need to be available to be called on during this period. The number of days that Braille experts may be expected to work during this contract period will depend on the subject requirements, key stage and their availability.

Timelines for individual assignments will be defined upon commencing each test development cycle. Successful contractors will be required to confirm with the contract manager their availability for Braille Quality Assurance activities as requested.

**3. INSTRUCTIONS TO BIDDERS**

Bidders should read these instructions carefully 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 make contact with any other employee, agent or consultant of the STA who is in any way connected with this procurement exercise during the period of the exercise, unless instructed otherwise by the STA.

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

The Bidder shall ensure that each and every proposed sub-contractor, consortium member and adviser abides by the terms of these instructions.

The 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 the STA (whether directly or by its agents or representatives) and any other party.

Bidders shall accept and acknowledge that, by issuing this ITT, the 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.

The 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 30 days from the submission date.

**3.2 Proposed contract**

This contract will be let under the terms and conditions of Framework Ref: STA-0230. The contract will be for a period of two years from 1 August 2019 to 31 July 2021. 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. The 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 the 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 or Order Special Terms for this work, noting that STA gives no undertaking to agree to any changes.

|  |  |  |
| --- | --- | --- |
| **Contract Reference** | **Issue** | **Proposed mitigation** |
|  |  |  |

A copy of the draft contract is included in the Appendix for your information.

**3.3 Procurement and delivery timescales**

The proposed procurement timetable is set out below:

|  |  |
| --- | --- |
| **Date** | **Stage** |
| 03/04/2019 | ITT issued |
| Midday 15/05/2019 | Deadline for clarification questions |
| Midday 29/05/2019 | Deadline for submission of applications |
| 17/07/2019 | Notification to successful supplier s and contracts issued |
| 18/07/2019 – 31/07/2019 | Successful suppliers to sign and return contracts |
| 01/08/2019 | Contract start date |

**3.4 Clarification questions**

Clarification requests should be submitted by e-mail only to: TendersTD.STA@education.gov.uk and copied to rashida.akbar@education.gov.uk.

In order to ensure equality of treatment of Bidders, the STA intends to publish the questions and clarifications raised by Bidders, together with the 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 the 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 the STA will either:

* invite the Bidder submitting the query either to declassify the query or allow the query, along with the 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.

The 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 application**

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

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

The STA relies on Bidders' own analysis and review of information provided. Consequently, Bidders are solely responsible for obtaining the information which they consider is necessary in order to make decisions regarding the content of their applications and to undertake any investigations they consider necessary in order to verify any information provided to them by the STA during the procurement process.

**3.6 Confidentiality**

All information supplied by the 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 Quote.

All information supplied by Bidders to the 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 bidder’s application including other work for the STA that could conflict with the objective and successful discharge of these services.

Curriculum advisors will not be able to act as proofers for the subject / key stage for which they are currently contracted.

Bidders should not be employed by the item writing agency that is contracted by STA to develop test materials.

**3.8 Daily rates and payment**

The daily rate for Braille proofing work is £250. VAT is not applicable and individuals will be taxed at source.

Any successful applicants will be paid on the completion of the relevant work. 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.

**3.9 Submission of applications**

The application must be submitted in the form specified by completing the Bidder’s Response section and using Arial 11 font and in English. Word limits must be adhered to and material in excess of these limits will not be evaluated.

Bidders must submit their responses in electronic format as a Microsoft Word 2016 (or equivalent) of the Bidders Response with their organisation name in the document title.

Applications must be received by midday on 29 May 2019 and should be sent to TendersTD.STA@education.gsi.gov.uk.

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

Any application 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**

The 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. The 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**

Applications will be evaluated in order to determine the most advantageous solution for the STA in line with the Framework ordering process.

Applications that meet the quality threshold of each applicable section will be added to the Braille Quality Assurance Framework 2019 –2021.

**4.2 Evaluation process**

Applications will be formally logged upon receipt. Any application that is received after the deadline may be rejected.

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

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

The method of scoring the evaluation sections will be a 0 - 4 point scale. Evaluators will use this to assign a score to each evaluation question response.

|  |  |
| --- | --- |
| Score | Description |
| 4 marks | A score of 4 will reflect that the bidder has demonstrated highly relevant experience and expertise and therefore has a high probability of successfully delivering the required work. |
| 3 marks | A score of 3 will reflect that the bidder has demonstrated sufficient relevant experience and expertise and therefore has a good probability of successfully delivering the required work. |
| 2 marks | A score of 2 will reflect that the bidder has demonstrated some relevant experience and expertise and therefore has some probability of successfully delivering the required work. |
| 1 mark | A score of 1 will reflect that the bidder has not demonstrated relevant experience and expertise and therefore is unlikely to be able to successfully deliver the required work. |
| 0 marks | No answer provided.  |

**4.3 Award decision**

Applications will be reviewed individually against the stated criteria. All applicants who exceed the threshold score for each applicable section will be considered for inclusion on the Framework.

**4.4 Allocation of Work**

Work will be awarded on first come first served basis subject to availability of proofing experts. We will write to all successful proofers on the Braille Quality Assurance Framework 2019-2021 the first time we require proofers for each proofing category and award the work to those experts who express an interest first. The next time we require these services, we shall write to the proofers again but remove those who were awarded work the first time around from the circulation. Subsequent work will continue to be allocated using this method (i.e. those already allocated work will be excluded) until all proofers on the framework have been allocated one piece of work. Once all proofers have been allocated work, the cycle will repeat. Allocating work in this way is designed to ensure fairness and mitigate the risk of work always being awarded to the same individuals.

**4.5 Quality**

A quality assessment will be carried out upon completion of each allocated piece of work. Proofers who pass the quality assessment will be eligible for later allocation according to the rules above. Those who do not pass the quality assessment will no longer be eligible for later allocations.

**5. BIDDER’S RESPONSE**

Please provide responses to questions in the table below:

|  |  |
| --- | --- |
| **How many years’ experience of proofing print-based materials do you have?** |  |
| **How many years’ experience of quality assuring Braille materials do you have?** |  |
| **Have you previously undertaken any formal training in proofing print-based materials?** | Yes / No |
| **Have you previously undertaken any formal training in proofing Braille materials?** | Yes / No |
| **Please list any formal training undertaken / qualifications which you have in relation to print-based proofing and Braille proofing.** |  |

Applications will be evaluated solely on the responses and associated evidence provided by the Bidder in this section of the ITT.

Bidders should complete Part A (Quality Assurance), Part B (Braille Expertise) and the Additional Questions sections.

All questions in Part A and Part B will be scored according to the 5 point scale below (as outlined in section 4.2).

|  |  |
| --- | --- |
| Score | Description |
| 4 marks | A score of 4 will reflect that the bidder has demonstrated highly relevant experience and expertise and therefore has a high probability of successfully delivering the required work. |
| 3 marks | A score of 3 will reflect that the bidder has demonstrated sufficient relevant experience and expertise and therefore has a good probability of successfully delivering the required work. |
| 2 marks | A score of 2 will reflect that the bidder has demonstrated some relevant experience and expertise and therefore has some probability of successfully delivering the required work. |
| 1 mark | A score of 1 will reflect that the bidder has not demonstrated relevant experience and expertise and therefore is unlikely to be able to successfully deliver the required work. |
| 0 marks | No answer provided.  |

**Part A: Quality Assurance**

|  |
| --- |
| **Question 1**: In no more than 750 words, please provide details of your expertise and experience in quality assurance of print-based materials (this should include any formal training in print-based QA processes). Your response should:* demonstrate substantial experience in the quality assurance of print-based materials.
* provide details where expertise has been used in other educational settings, such as educational publishing, other test development situations, to LAs, at conferences or in academic or education articles.

*Question Weighting: 50%* |
| **Bidders response:***Word count =* |

**Part B: Braille Expertise**

|  |
| --- |
| **Question 2**: In no more than 750 words, please provide details of your understanding and experience of reviewing and quality assuring Braille content.Your response should demonstrate:* an in depth understanding of quality assurance of Braille content that supports reliability, validity and consistency; and
* familiarity with all current Braille standards for pupils of different ages.

*Question Weighting:50%* |
| **Bidders response:***Word count =* |

The technical quality threshold for all questions (Part A and Part B) is 60%.

**Additional questions** (not scored)

Please provide responses to the additional questions below. Please note that these are not scored.

|  |  |
| --- | --- |
| **Are you classed as a Small Medium Enterprise (SME)?** | Yes / No  |
| **If you are currently working on any test development / marking activities for STA or any other organisation, please provide details here.** |  |
| **Please indicate periods of known unavailability for the duration of the contract.** |  |

**Declaration by Bidder**

I have examined the STA's requirements and the additional special terms set out in this ITT, and hereby offer to enter into a contract with the STA for the required services and at the prices set out in this ITT.

I furthermore warrant that:

* I have the required corporate authority to sign this Tender;
* There has been no breach of the STA's confidentiality requirements;
* There is no conflict of interest in our proposed delivery of this service;
* There has been no collusion with other Bidders or potential Bidders;
* There has been no canvassing of STA staff; and
* The Tender shall remain open for acceptance by the STA for a period of 30 days after the due date for return of Tenders.

|  |  |
| --- | --- |
| Signed: |  |
| Name: |  |
| Date: |  |
| Role: |  |
| Authorised to sign Quotes on behalf of [organisation name if applicable]: |  |

**Annex A: Test Booklet and Mark Scheme Handover Process Checklist**

|  |
| --- |
| **Expert Braille proofer check** |
| **Name of proofer** |  | **Date of Check** |  |
| **Purpose of check** | To check Braille (& transcript) versions of the tests received from the Modified Test Agency (MTA) |
| **Documents required for check:** | 1. Braille tactile (dots) version of test paper
2. Transcript of Braille (Word document)
3. Discussion proof from modified meeting 2 and/or previous proof.
4. A copy of the latest standard test.
5. Guidance for modified test administrators.
 |
| **Who does this check?** | Someone who is able to read a Braille paper.  |
| **Subject/ key stage/tier** |  |
| **Test Session (circle one)** | **Live**  |

| **Name of documents being checked** |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Description of check** | **Indicate with an ‘X’ if check complete** |
| Work through the paper (i.e., follow all instructions / do the test) |  |  |  |  |
| Check the front cover information:* Title
* Level
* Year of test
* Date of opening
 |  |  |  |  |
| Check that wording makes sense, in:* General instructions
* Questions
* Mark scheme amendment advice
* Accompanying guidance
 |  |  |  |  |
| Check the number sequencing of pages |  |  |  |  |
| Check the number/lettering sequencing of questions |  |  |  |  |
| Check that all cross-references to other pages / sections in the document, and between documents (e.g. reading question booklet & reading booklet) are correct |  |  |  |  |
| Check the alignment of dots is consistent |  |  |  |  |
| Check the quality of the raised diagrams / graphs / tactile pages (if supplied) |  |  |  |  |
| Check that the transcript matches the Braille dots exactly |  |  |  |  |
| Check you have marked up any errors/change requests on the Braille paper itself. |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
| Add rows as required |  |  |  |  |

I have checked the materials thoroughly against the checklist.

Signed\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Please return checklist, notes and any marked up Braille pages to the STA.

Please note – the booklets reviewed as part of the check, must be retained with the checklist to ensure a complete document trail.

STA Test Development Researcher to respond with note of major changes addressed as a result of the proof.

**Appendix B: 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.

