

**Invitation to Quote (ITQ)**

**Contract STA-0128-16 Provision of Item Writing for Key Stage 1 English Reading**

**Contract STA-0128-17 Provision of Item Writing for Key Stage 2 English Reading**

|  |  |
| --- | --- |
| **Tenderer:** |  |

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# INTRODUCTION

## Purpose

* 1. This ITQ has been issued by the Standards and Testing Agency (STA) for the purpose of securing items for tests in
* key stage 1 English
* key stage 2 English
* (collectively “the Item Writing Services”).
  1. The delivery of the Item Writing Services will be governed by the Department for Education’s (DfE) standard Contract for Item Writing Services which will be let in accordance with, and subject to, English law.

## Structure

* 1. This ITQ:
* Outlines the planned procurement process;
* Sets out the context for the required services and details of the STA’s requirements; and
* Contains a tender response section to evaluate the Tenderer's proposed solution to the STA requirements ("Tender").

## Disclaimer and Conditions

* 1. No information contained in this ITQ or in any communication made between STA and any Tenderer shall be relied upon as constituting a contract, agreement or representation that any contract will be offered.
  2. STA reserves the right, subject to compliance with the Public Contracts Regulations 2006 (as amended), ("the Procurement Regulations"), to change without notice the basis of, or the procedures for, this ITQ or to terminate the ITQ at any time.
  3. The information contained within this document is confidential and should not be disclosed except for purposes related to the completion of the Tender.
  4. STA is responsible for developing the national curriculum assessments on behalf of DfE and must ensure that all contracted agencies and consultants are aware of, and comply with, the relevant sections of the current Ofqual Regulatory Framework.

To reference please refer to the *Regulatory Framework for National Assessments: National curriculum and Early Years Foundation Stage* https://www.gov.uk/government/uploads/system/uploads/attachment\_data/file/481558/2011-regulatory-framework-for-national-assessments.pdf

## Freedom of Information and Transparency

* 1. As the executive agency of a public authority, STA is committed to open government and to meeting its legal responsibilities under the Freedom of Information Act 2000 (“FOIA”). Accordingly, Tenderers should be aware that all information submitted to a public authority may need to be disclosed by the public authority in response to a request under the FOIA and that, in addition, DfE may also decide to include certain information in the publication scheme, which it maintains under FOIA.
  2. STA participates fully in the Government’s transparency arrangements. As such, Tenderers should be aware that:
* any contracts or agreements resulting from its procurement exercises may be published in full, subject to limited redactions in line with FOIA exemptions; and
* financial transactions in relation to any contracted goods or services will be published and so cannot be deemed commercially sensitive (see over).
  1. If a Tenderer considers that any of the information included in its Tender is commercially sensitive, it should identify this information in the table below and explain a) what harm may result from disclosure if a request is received, and b) the time period applicable to that sensitivity. Tenderers should be aware that, even where they have indicated that information is commercially sensitive, STA may be required to disclose in response to a request under FOIA or as part of the Government's transparency arrangements. For example, the value of a contract must be made publicly available so this information cannot be deemed commercially sensitive.

|  |  |  |
| --- | --- | --- |
| **Section** | **Commercial Sensitivity** | **Time Period** |
|  |  |  |

# INSTRUCTIONS TO TENDERERS

* 1. Tenderers should read these instructions carefully before completing their Tenders.
  2. These instructions are designed to ensure that all Tenderers are given equal and fair consideration. It is important therefore that you provide all the information asked for in the format and order specified.
  3. The Tenderer shall not make contact with any other employee, agent or consultant of STA who is in any way connected with this ITQ exercise during the period of this ITQ exercise, unless instructed otherwise by the Test Development Procurement Manager, Rashida Akbar.
  4. All material issued in connection with this ITQ shall remain the property of STA and shall be used only for the purpose of this ITQ exercise. Any confidential STA Information shall either be returned to STA or securely destroyed by the Tenderer (at STA’s option) at the conclusion of the exercise.
  5. The Tenderer shall ensure that each and every proposed sub-contractor, consortium member and adviser abides by the terms of these instructions.
  6. STA shall not be committed to any course of action as a result of:
* Issuing this ITQ or any invitation to participate in this ITQ exercise;
* Communicating with a Tenderer or a Tenderer’s representatives or agents in respect of this ITQ exercise; or
* Any other communication between STA (whether directly or by its agents or representatives) and any other party.
  1. Tenderers shall accept and acknowledge that, by issuing this ITQ, STA shall not be bound to accept any Tender and reserves the right not to conclude a contract for the services for which Tenders are invited.
  2. STA reserves the right to amend, add to, or withdraw all or any part of this ITQ at any time during the ITQ exercise.

## Tender Validity

* 1. Your Tender should remain valid for a period of 30 days from the submission date.

## Proposed Contract

* 1. Contracts for the provision of Item Writing Services will be let under the STA’s standard Contract for the Provision of Item Writing Services. Contract numbers for each subject are provided in the table below:

|  |  |
| --- | --- |
| **Subject** | **Contract Number** |
| Key stage 1 English reading | STA-0128-16 |
| Key stage 2 English reading | STA-0128-17 |

## Procurement Timescales

* 1. The proposed timetable for the ITQ exercise is set out below. STA reserves the right to change this if it becomes operationally necessary so to do.

|  |  |
| --- | --- |
| **DATE** | **STAGE** |
| 04 December 2017 | ITQ issued to Suppliers |
| 12:00hrs, 08 January 2018 | Deadline for submission of Clarification Questions by Tenderers |
| 12:00hrs, 19 January 2018 | Closing Date for receipt by STA of Tenders |
| 19 February 2018 | Notification of Award Decision |
| 05-09 March 2018 | Proposed contract Commencement and Start-Up Meeting |

## Clarification Questions

* 1. Clarification Questions should be submitted by e-mail only to TendersTD.STA@education.gov.uk and cc’d to [rashida.akbar@education.gov.uk](mailto:rashida.akbar@education.gov.uk). No further requests for clarifications will be accepted after the date shown in the table above. All communications should be clearly headed "Provision of Item Writing "and should include the subject and contract number which the question refers to. The name, contact details and position of the person making the communication should also be included.
  2. STA will endeavour to answer all questions as quickly as possible, but cannot guarantee a minimum response time.
  3. In order to ensure equality of treatment of Tenderers, STA intends to publish the questions and clarifications raised by Tenderers, together with STA’s responses (but not the source of the questions), to all participants on a regular basis via email.
  4. Tenderers should indicate if a query is of a commercially sensitive nature – where disclosure of such query and the answer would or would be likely to prejudice its commercial interests. However, if STA at its sole discretion either does not consider the query to be of a commercially confidential nature, or considers the query to be one which all Tenderers would potentially benefit from seeing, then STA will either:
* Invite the Tenderer submitting the query to either declassify the query and allow the query, along with the STA’s response, to be circulated to all Tenderers; or
* Request the Tenderer, if it still considers the query to be of a commercially confidential nature, to withdraw the query.
  1. STA reserves the right not to respond to a Clarification Question or to circulate such a Question where it considers that the answer to that Question would be likely to prejudice its own commercial interests.

## Preparation of Tender

* 1. Tenderers are solely responsible for their costs and expenses incurred in connection with the preparation and submission of their Tender. Under no circumstances will STA, or any of its advisers, be liable for any costs or expenses borne by Tenderers, sub-contractors, suppliers or advisers in this process.
  2. Tenderers are required to complete and provide all information required by STA. Failure to comply with the ITQ requirements may lead STA to reject a Tender.
  3. STA relies on Tenderers' own analysis and review of information provided. Consequently, Tenderers are solely responsible for obtaining the information which they consider is necessary in order to make decisions regarding the content of their Tenders and to undertake any investigations they consider necessary in order to verify any information provided to them by STA during the procurement process.

## STA Point of Contact

* 1. Unless stated otherwise in these instructions or in writing from STA, all communications from Tenderers (including their sub-contractors, consortium members, consultants and advisers) during the period of this procurement exercise must be directed to the contact identified in paragraph 2.12.
  2. All communications should be clearly headed "Provision of Item Writing "and should include the subject and contract number which the question refers to. The name, contact details and position of the person making the communication should also be included.

## Confidentiality

* 1. All information supplied by STA to you must be treated in confidence and not disclosed to third parties except insofar as this is necessary to obtain sureties or quotations for the purposes of submitting the Tender.
  2. All information supplied by Tenderers 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 and forthcoming transparency procedures.

## Conflict of Interest

* 1. Any known conflicts of interest, or any potential conflicts of interest that may be reasonably foreseen, should be declared in the Tender.

## Value Added Tax

* 1. STA is VAT registered. It is also an “eligible body” as classified in VAT Notice 701/30 "Education and Vocational Training". Proposals must therefore include VAT where applicable. Where any doubt exists, Tenderers are expected to have sought clarification from HM Customs and Excise. Prices in the Tender will be accepted on this basis.
  2. Tenderers are requested to set out their understanding of the VAT status of the contract based on the services to be provided and the status of STA. There will be no adjustment to the contract sum if VAT is subsequently found to be payable.

## Submission of Tenders

* 1. The Tender must be submitted in the form specified by completing the Tenderer's Response using Arial 11 font and in English and using pounds sterling. Where applicable, word limits must be adhered to and material in excess of these limits will not be evaluated.
  2. Tenderers must submit their responses by email to [TendersTD.STA@education.gov.uk](mailto:TendersTD.STA@education.gov.uk) cc’d to [rashida.akbar@education.gov.uk](mailto:rashida.akbar@education.gov.uk) in the following format:
* One complete and signed electronic version in MS Word 2016 (or compatible) format labelled '**priced'** of their Tender and with their organisation name in the document title for each subject tendered; and
* One electronic version in MS Word 2016 format (or compatible) labelled **'not priced'** of their Tender excluding the pricing information and with their organisation name in the document title for each subject tendered.
  1. Any example test materials and supporting documents submitted in response to Question 3 of the Tenderer’s Response should be merged into a single file per subject and either embedded into your response document, or provided as a separate document. Any passwords should be provided separate to your bid.
  2. Tenders must be received by 12:00 noon on 19 January 2018.
  3. Tenders will be accepted at any time up to this deadline but will not be opened or evaluated until the deadline has passed.
  4. Any Tender received after the deadline may be rejected unless the Tenderer can provide irrefutable evidence that the Tender was capable of being received by the due date and time and that delivery failure was beyond their reasonable control.

## Right to Reject/Disqualify

* 1. STA reserves the right to reject or disqualify a Tenderer where:
* The Tenderer fails to comply fully with the requirements of this ITQ, 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 Tenderer that impacts on the selection and/or evaluation process.

## Debriefing

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

# EVALUATION METHODOLOGY

## Basis of Award Decision

* Technical Evaluation 70%
* Commercial Evaluation 30%

## Evaluation Process

* 1. Tenders will be formally logged upon receipt - any Tender that is received after the deadline for submission will be rejected.
  2. Following the deadline for submission, a compliance check will then be conducted on all Tenders that are received on time to determine whether they correspond to the tender requirements. STA may reject any Tender that does not comply with these tender requirements.
  3. Tender evaluation will then comprise three stages:
* (1) Legal evaluation – confirmation of acceptance of the terms and conditions of the standard Contract for Item Writing Services according to the Declaration by Tenderer.
* (2) Technical evaluation – scoring of the un-priced technical responses required in the Tender by an independent evaluation panel using the scores per criterion set out in that section and with the technical criteria weighted according to the table below:

|  |  |
| --- | --- |
| **Technical Criterion** | **Weighting** |
| Expertise in item development and design (see question 1) | 35% |
| Project Management (see question 2) | 10% |
| Example test materials (see question 3) | 45% |
| Item Management (see question 4) | 10% |

* (3) Commercial evaluation – assessment of the price for the services as set out in the pricing schedule

## Award Decision

* 1. The technical and commercial evaluation scores will then be combined using the following methodology:
* Technical Score = 100 x (Tenderer's technical score / Best technical score)
* Price Score = 100 x (Lowest price / Tenderer's price)
* Combined Score = (70% x Technical Score) + (30% x Price Score)
* Quality Threshold: Tenderers scoring over 66% for their technical score will then be considered for award. STA reserves the right to amend this threshold in the event only one supplier scores higher – we will notify all parties if this occurs.
  1. Each key stage submitted will be evaluated separately.
  2. Each Work Package will be evaluated separately and they will be awarded to the Tenderer with the highest combined score in each case, with the intention of awarding to two different suppliers for key stage 2. STA reserves the right to award all work packages to a single supplier in the event only one supplier scores higher than the Quality Threshold.
  3. STA reserves the right to withhold awarding Work Packages for a particular subject if no suppliers pass the Technical Score.
  4. For key stage 1 there will be two Work Packages: One Work Package will be awarded to the Tenderer with the highest score which exceeds the technical threshold, according to their indicated preference. The other Work Package will be awarded to the Tenderer with the second highest combined score, assuming the technical threshold has been exceeded.
  5. For key stage 2 there will be two Work Packages: One Work Package will be awarded to the Tenderer with the highest score which exceeds the technical threshold, according to their indicated preference. The other Work Package will be awarded to the Tenderer with the second highest combined score, assuming the technical threshold has been exceeded.
  6. Following evaluation, a summary of the relative quality score and relative price score will be fed back to all bidders. An example of the level of information provided for each work package is given below:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | [**Technical threshold result**](file:///C:/Users/cwoodyard/AppData/Local/Microsoft/Windows/Temporary%20Internet%20Files/Content.Outlook/KRF8QBGW/STA0012%20(Maths%20L3-5)%20-%20WP1%20-%20ITQ%20Evaluation%20Summary%20-%20Moderated%20-%2027012012.xls#'Technical Evaluation'!A1) | [**Relative Quality Score**](file:///C:/Users/cwoodyard/AppData/Local/Microsoft/Windows/Temporary%20Internet%20Files/Content.Outlook/KRF8QBGW/STA0012%20(Maths%20L3-5)%20-%20WP1%20-%20ITQ%20Evaluation%20Summary%20-%20Moderated%20-%2027012012.xls#'Technical Evaluation'!A1) | [**Relative Price Score**](file:///C:/Users/cwoodyard/AppData/Local/Microsoft/Windows/Temporary%20Internet%20Files/Content.Outlook/KRF8QBGW/STA0012%20(Maths%20L3-5)%20-%20WP1%20-%20ITQ%20Evaluation%20Summary%20-%20Moderated%20-%2027012012.xls#'Price Evaluation'!A1) | **Weighted Combined Score** | **Rank for Compliant Bidders** |
|  |  | **70%** | **30%** |  |  |
| **Tenderer A** | **PASS** | **0.73** | **0.12** | **0.55** | **3** |
| **WINNER 1** | **PASS** | **0.93** | **1.00** | **0.95** | **1** |
| **Tenderer C** | **PASS** | **0.67** | **0.23** | **0.54** | **4** |
| **WINNER 2** | **PASS** | **1.00** | **0.57** | **0.87** | **2** |

# SPECIFICATION OF REQUIREMENTS (SoR)

**Background**

* 1. This section of the ITQ sets out the Specification of Requirements (SoR) with respect to the items and mark schemes for the tests.
  2. Unless indicated otherwise, it should be assumed that each requirement applies to key stage 1 and key stage 2.
  3. STA reserves the right to award a contract for a whole subject and/or key stage to a single supplier in the event that only one suitable Tender is received.
  4. All work packages are to assess the range of cognitive demand, question styles and content domain of the draft test framework in the relevant subject area as specified in section 4.9.
  5. Please note that the STA uses an item banking approach for test development. The item bank will be reviewed on a regular basis to identify areas where there are insufficient questions, meaning that at the point of project start-up, agencies will be provided with a more specific question writing brief to help address any areas of shortfall.

**Revised National Curriculum**

* 1. On 11 September 2013 the Secretary of State for Education published the new national curriculum framework following a series of public consultations. The Government wants the new national curriculum for primary English, mathematics and science to set out the very highest expectations for all pupils and to be on a par with the highest-performing education jurisdictions in the world.
  2. The new Programmes of Study are available to download: <https://www.gov.uk/government/publications/national-curriculum-in-england-primary-curriculum>
  3. The documents are very specific about the content to be covered, given the fundamental importance of these subjects as a foundation for further study and as the basis for our system of school accountability.

**Test Frameworks**

* 1. Test frameworks for key stage 1 and key stage 2 are based on the new national curriculum published in September 2013. Each framework defines what is assessed, via the content and cognitive domains and sets out the criteria for test construction in the test specification. <https://www.gov.uk/government/collections/national-curriculum-assessments-test-frameworks>
  2. Sample materials have been published based on the frameworks. <https://www.gov.uk/government/collections/national-curriculum-assessments-2016-sample-materials>
  3. The 2016 English reading test can be found here: <https://www.gov.uk/government/publications/key-stage-2-tests-2016-english-reading-test-materials>
  4. The 2017 English reading test can be found here:

<https://www.gov.uk/government/publications/key-stage-2-tests-2017-english-reading-test-materials>

## Project Deliverables/Outputs and Critical Steps

* 1. The Project deliverables/outputs are provided in the table below, and individual deliverables or outputs are indicated as Critical Steps where appropriate. All deliverables and outputs are categorised as mandatory and it is essential that you confirm that you can meet them in full. Unless indicated below, all dates are negotiable with STA. Failure to provide confirmation in your proposal documents may result in your proposal being rejected.
  2. The specific date for all Requirements 1 – 11 must be included within the project plan in the response to the Technical Evaluation.

| **No** | **Deliverables/Outputs** | **Acceptance Criteria** | **Due**  **Date** |
| --- | --- | --- | --- |
| 1 | **Start-Up Meeting – FIXED DATE**  Supplier will provide:   * Detailed plan for item and mark scheme production for review and joint sign-off, including proposed dates for any meetings outlined in this specification * Detailed plan for when checkpoints will be held for review and joint sign-off * Detailed project risk and issue log (Risk Log) for review and joint sign-off * Project Initiation Document (PID)   STA will provide:   * Clarification of any item writing requirements * Guidance on criteria to consider when selecting quality texts will be discussed – information is provided in this ITQ. | Project Director / Project manager (or equivalent) attend the Start-Up Meeting and provision of listed documents by agreed date. | **w/c 5 March 2018** |
| 2 | **Text Submission**  Submit 200% of the required texts from which the final texts will be selected for further development and item writing.  Provide assurance that the texts submitted are of sufficient quality to use in a national curriculum test.  This assurance will be provided by suppliers taking the following steps:   * Gathering enjoyment ratings for all of the proposed texts from 200 pupils of the target age group from at least 5 schools, which must cover a range of geographical areas and attainment records. A small number of other questions related to pupil reactions to the texts may also be asked; these will be detailed at the start up meeting. * A report based on the findings of the school visit will then be compiled and submitted to STA as part of the text submission process. This report should focus on a discussion with the pupils about whether they enjoyed the texts and why and what they did or did not enjoy specifically (e.g. language, content, etc.) * Provide further assurance that texts have the potential to generate sufficient items for coverage of the curriculum and with limited enemies. Texts should be highlighted and annotated to demonstrate which sections provide the potential for questions. * Provide assurance of how the texts meet the criteria for fiction/non-fiction texts set out in the item writing guidance (see annex E, pages 7 to 13) * Readability checks are also required on individual texts. The checks required are: Word count, Flesch-Kincaid, New Dale-Chall, New Fog Count, Spache, SMOG   Proposed texts highlighted and annotated for potential items to be submitted to STA at least one week in advance of the text selection meeting.  NOTE: For narrative texts, the complete book must be read to ensure that the themes and events are suitable for inclusion in a national test. The Supplier must provide assurance that this has been done by the text selection meeting. | Project Director / Project manager (or equivalent) attend the Text Selection Meeting and provide the texts, the report on findings from school visits and potential questions a week in advance for consideration.  Number of good quality texts provided meets the specification of requirements. | **w/c 23 April 2018** |
| 2a | STA will hold an expert review panel on submitted texts to gather the views of teachers at this early stage of development. Teachers will also be asked whether they feel that the content / subject matter of the texts is appropriate for Key Stage 1 / Key Stage 2 children who will be sitting the test.  This will form part of the evidence base on which STA will decide which texts to take forward to the item writing phase.  Optional attendees: Supplier representative and STA curriculum advisors (as observers) |  | **w/c 30 April 2018** |
| 3 | **Text Selection Meetings**  Attend meeting to discuss and explain text selection choices and agree which texts will be taken forward into development.  The guidance in annex E should be referred to when explaining the suitability of the materials.  For narrative texts, once these are chosen, after the text selection meeting a copy of the complete book should also be provided to STA.  If there are not sufficient texts that are deemed to be fit for purpose to go forward to item writing stage, the supplier will be asked to identify alternative texts. | Required number of texts of sufficient quality submitted and selected  STA Test Development Researchers to attend and present collated feedback from TDRs and curriculum reviewers. | **w/c 14 May 2018** |
| 4 | **Checkpoint Meetings and Management Information**  To attend regular checkpoint meetings at least once a month, although they may need to be more frequent at some stages of the project. These meetings may 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 working days in advance of each checkpoint meeting. | Timing and frequency to be agreed at start-up meeting |
| 5 | **Item Writing, Internal Review and Handover of Materials for the Pre-trial Meeting**  All items and draft mark schemes should be written at this stage and draft cognitive and content domain references assigned.  Following text selection, all texts and items should be internally reviewed.  At least 20% of items should be flagged as suggestions for informal trialling.  All materials written for the project to be handed to STA in both electronic and hard copy versions.  There is an expectation that the item writing agency (IWA) write more items than needed because of attrition following review and informal trialling. | Sufficient high-quality materials submitted to be able to handover the required material at the end of the project and allow for some attrition throughout the process. | Two weeks prior to the Pre-Informal Trial Meeting |
| 6 | **Pre-Informal Trial Meeting**  To agree which items need to be informally trialled and to agree any amendments required to items prior to trialling taking place. Feedback is provided by STA on all items at this stage. If items are rejected as a result of trialling, the supplier must ensure that there are alternative, viable questions that have been presented and discussed at the pre-trial meeting.  Suppliers must seek to limit the number of items assessing the same thing, albeit in a different question format in the final handover questions. These types of questions will be counted as one item for the purposes of the final handover package.  To agree the format and content of the informal trialling report.  The outcome of this meeting will determine the final cost for informal trialling.  This meeting may be via telephone, or face-to-face. Format to be agreed at the start-up meeting.  Design templates and guidance documents will be available no later than this stage.  The Supplier should note any amendments and share amendments and action to be taken with STA after the meeting for approval. | Project manager (or equivalent) attends meeting on agreed date.  STA Test Development Researchers to attend and present collated feedback from TDRs and curriculum reviewers. | **w/c 25 June 2018**  **cost for a 2-day meeting** |
| 7 | **Informal Trialling – Critical Step**  Items amended as per Pre-Informal Trial Meeting(s) and agreed items informally trialled with specified number of pupils.  Handover of two hardcopies of all Informal Trialling booklets and mark schemes/coding frames. | Required amendments completed before trialling.  100% of agreed items trialled with specified number of schools and pupils. (Plus any new items developed since the pre-informal trial meeting)  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 enable STA staff to attend some visits. | **To be agreed at start-up meeting** |
| 8 | **Interim Handover – Critical Step**  Provide electronic copies (format specified below) of all draft items and mark schemes, and draft item classification spreadsheet(s). Items and mark schemes to include suggested mark-up or amendments as a result of feedback from informal trialling, and there should be clear evidence of how those amendments are intended to improve item functioning. If items are rejected as a result of trialling, the supplier must ensure that there are alternative, viable questions that have been presented and discussed at the pre-trial meeting. Additional item writing should not be necessary at this stage.  Provide a summary table demonstrating the coverage of the interim handover materials against the number of marks, response types, content and cognitive domains specified. Please also provide text mark ups, mapping the questions to the specific areas of text.  Suppliers must seek to limit the number of items assessing the same thing, albeit in a different question format in the final handover questions. These types of questions will be counted as one item for the purposes of the final handover package.  Suppliers must minimise the number of enemy questions assessing any one text as per the specification of requirements below.  Handover two hardcopies of all Informal Trialling booklets and mark schemes/coding frames.  Mark schemes must also include comments gathered in internal review meetings and findings from informal trialling. This element replaces the requirement to produce a separate informal trial report.  The Contractor must handover InDesign files (STA uses CC 2014 or equivalent subject to prior agreement) of at least 10% of the total marks required at the interim handover stage in order for STA to check that the materials meet the Design Specification (see Annex F). The remaining items can be handed over in InDesign or MS Word (or compatible) format. | 100% of drafts of all materials required for completion of work package(s) received electronically by agreed date and to criteria specified in section 4.5, along with summary table and text mapping mark-up  All items informally trialled and being considered for Final Handover have received positive feedback from teachers and / or pupils; or are submitted with amendments and supporting evidence from trialling for those amendments.  STA Test Development Researchers to attend and present collated feedback from TDRs and curriculum reviewers. | **w/c 6 August 2018** |
| 9 | **Interim Review Meeting**  Meeting with STA and item writers to review materials and outputs from the Supplier’s internal review and informal trialling.  Meeting will be used to discuss informal trialling – key messages, problems, discuss the report, resolve issues identified with items and agree any changes to items. In the report the Supplier must say why the change is suggested and what evidence there is for the change.  At the meeting, the Supplier should also expect further review comments from STA TDRs and curriculum reviewers in light of any changes made at the pre-informal trialling meeting.  These further changes to materials will be discussed at this meeting. The Supplier will complete these and any other agreed amendments prior to final handover. The Supplier should note any amendments and share amendments and action to be taken with STA after the meeting for approval. | Project Manager / Lead Item Writer attend Interim Review meeting on agreed date.  STA Test Development Researchers to attend and present collated feedback from TDRs and curriculum reviewers. | **w/c 20 August 2018** |
| 10 | **Final Handover – Critical Step**  **Hard Copy Handover** - Supplier to hand over hard copies of the texts, items, mark schemes and item classification grid. (File formats for each of these to be confirmed with STA).  We ask that suppliers split the item set for each text into two different versions as per the specification of requirements (see pages 21 and 24 in this ITQ).  Please also provide a mark-up for each text, mapping the questions to the specific areas of text being assessed.  A template for the item classification grid is provided at Annex B.  **Electronic Handover** – Supplier to hand over materials using the DfE portal in the first instance. However, an encrypted memory stick (provided by STA) or Egress transfer can be used as a contingency.  Assignment / licences of IPR for DfE’s benefit completed.  The handover is to take place in a meeting at STA offices wherever possible. | 100% of specified hard copy materials received at STA by agreed date and materials are of appropriate quality as listed under Performance Requirements.  Receipt of electronic materials specified and attendance at Final Handover meeting on agreed date (“Final Handover Date”). | **w/c 8 October 2018** |
| 11 | **Acceptance of Final Handover Materials – Critical Step**  Materials must be handed over as per specification, so that materials match templates as required and all other instructions are followed.  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.  STA will notify Suppliers once all Acceptance Criteria have been met. | 100% of specified of materials with STA no later than two weeks after Final Handover Date. All materials to be error free. | **w/c 22 October 2018** |

## Functional Requirements

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| **Functional Requirements** | |
| **Assessment type:** | National curriculum assessment – for pupils at the end of key stage 1 and key stage 2 |
| **Item Development and Design:** | The number of marks stated for each work package outlined below is the total number of marks which must be provided at final handover. Suppliers will need to ensure sufficient items are created to allow for any losses during the process. |
| **Item Writing requirements for each subject:** | **Key stage 1 English reading** |
| The items will be used in tests which assess the (2014) national curriculum programme of study for key stage 1 English.  **Final test format**  There are two test components: One integrated reading and answer booklet and one separate reading booklet with associated reading answer booklet.  *Reading booklet 1*comprises 2-3 texts with questions interspersed. The total word count will be approximately 400 – 700 words. This component contains 20 marks. Questions in this booklet are based on the sections of the text on the same or the facing page. Texts in reading booklet 1 should focus on the low to middle end of reading difficulty for pupils at the end of year 2. We would expect to have 2 texts, a fiction text and a non-fiction text, in the first booklet.  *Reading booklet 2* comprises 2-3 texts, totalling approximately 800 - 1100 words. The associated reading answer booklet will contain 20 marks. Texts for reading booklet 2 should focus on the middle to upper end of reading difficulty for pupils at the end of year 2.  Links to past papers and the test specification can be found in Annex F.  **Work Package 1**   * **Booklet 1 – Three fiction texts and one non-fiction text** * **Booklet 2 – Three fiction texts and one non-fiction text**   **Work Package 2**   * **Booklet 1 – Three fiction texts and one non-fiction text** * **Booklet 2 – Three fiction texts and one non-fiction text**   The items will be based on a stimulus reading text. The supplier will be required to source stand-alone texts assessing English reading to match the cognitive demand ratings as described in the new test framework for 2016 for complexity and item response. These texts must be appropriate for a national cohort of pupils in year 2, free from sensitive or controversial subject matter and likely to be appealing or engaging to pupils at the end of key stage 1. They should provide a rich source for eliciting items across the content and cognitive domains.  Items for each text must be presented in two separate item sets (to match the two versions of test booklets that will be taken to IVT). There should be no items appearing in both booklets and no enemies (questions that would not appear together in a final test paper) within each individual item set. Additionally, the number of enemies must be kept to a minimum – that is no more than 3 questions in each set that have an enemy in the other set.  Suppliers should specify which of their texts are assessing low, medium or high reading difficulty.  **General guidelines for the selection of fiction texts**  Please avoid subjects that may advantage certain children or that some may be more familiar with than others.  Currently, we would welcome more contemporary fiction texts rather than extracts from historical fiction texts. The item writing guidance in Annex E contains lists of subjects that we wish to avoid.  The range of texts must reflect the diversity of life in contemporary British society and should be recognisable to the diverse cohort of pupils from across the country who will be sitting the tests. As such, we ask that item writers look for diverse narrative texts that avoid racial or cultural stereotyping.  The suite of texts provided should cover a range of character background and cultural experience, such that no group of children is advantaged or disadvantaged by familiarity with the context, with particular thought given to representativeness of gender, ethnicity and socio-economic background within the texts.  **General guidelines for the selection of non-fiction texts**  Non-fiction texts should feel authentic with a clear purpose and audience. Content should be engaging and accessible for the cohort and should not advantage those with prior knowledge of the topic. Information contained within the non-fiction texts must be checked for factual accuracy.    **Items**  Total requirements for each text will be approximately as per the tables below.   |  |  | | --- | --- | | **Booklet 1** | **Per text** | | **Total word count** | 100 - 250 | | **Total marks** | 20 | | **Required marks for making inferences (1d), giving the meaning of vocabulary in context (1a) and prediction (1e)** | Approximately 50% incorporating all three of these areas of the content domain  (we would expect the bulk of the marks to be made up of 1d making inferences items) | | **Required marks for retrieval (1b) items** | Approximately 50% | | **1 mark items** | 100% | | **2 mark items** | 0% | | **Open response** | 70 – 80% | | **Closed response** | 20 – 30% |  |  |  | | --- | --- | | **Booklet 2** | **Per text** | | **Total word count (booklet 2 texts)** | 250 - 500 | | **Total marks** | 20 | | **Required marks for making inferences (1d), giving the meaning of vocabulary in context (1a) and prediction (1e)** | approximately 50% | | **Required marks for retrieval (1b) items** | approximately 50% | | **1 mark items** | 17 - 18 marks | | **2 mark items** | 6 - 12 marks | | **Open response** | 70 – 80% | | **Closed response** | 20 – 30% |   NOTE: 2 mark items which are open response should include a variety of response requirements, i.e. items where two pieces of information / inferences are required with two numbered answer lines and items where pupils have to organise a longer response.  NOTE: Any items created additionally to the figures specified in this specification of requirements under this contract, which are intrinsically linked to the selected texts, should be also be presented at Interim Handover. |
| **Key stage 2 English Reading** |
| The items will be used in tests which assess the national curriculum (2014) programme of study for key stage 2 English.  **Work Package 1:**  **• two easy fiction texts**  **• three mid non-fiction texts**  **• three hard fiction texts**  The final test comprises a reading booklet with three texts of increasing reading demand and a separate reading answer booklet containing 50 marks’ of questions. Links to past papers and the test specification can be found in Annex F.  The items will be based on a stimulus reading text. The supplier will be required to source stand-alone texts assessing English reading to match the cognitive demand ratings as described in the test framework for complexity and item response. These texts must be appropriate for a national cohort of pupils in year 6, free from sensitive or controversial subject matter and likely to be appealing or engaging to pupils at the end of key stage 2. They should provide a rich source for eliciting items across the curriculum in the specified ranges.  Items must be presented 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). There should be no items appearing in both booklets and no enemies (questions that would not appear together in a final test paper) within an item set. Additionally, the number of enemies must be kept to a minimum specifically no more than 5 pairs of enemies in each set.  **Work Package 1**   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | Text type | Number of texts | Difficulty of text | Word count of texts | Number of independent marks for each text | Max number of enemy marks | | Fiction | 2 | Easy | 500-600 | 40 | 10 | | Non-fiction | 3 | Mid | 500-600 | 50 | 12 | | Fiction | 3 | Hard | 500-600 | 40 | 10 |   Associated mark schemes must be provided for each item.  **General guidelines for the selection of fiction texts**  Please avoid subjects that may advantage certain children or that some may be more familiar with than others.  Currently, we would welcome more contemporary fiction texts rather than extracts from historical fiction texts. The item writing guidance in Annex E contains lists of subjects that we wish to avoid. STA does not want texts where grandparents / elderly relatives are the main characters or texts featuring cats or the sea / sea creatures at this time.  The range of texts must reflect the diversity of life in contemporary British society and should be recognisable to the diverse cohort of pupils from across the country who will be sitting the tests. As such, we ask that item writers look for diverse narrative texts that avoid racial or cultural stereotyping.  The suite of texts provided should cover a range of character background and cultural experience, such that no group of children is advantaged or disadvantaged by familiarity with the context, with particular thought given to representativeness of gender, ethnicity and socio-economic background within the texts.    **General guidelines for the selection of non-fiction texts**  Non-fiction texts should feel authentic with a clear purpose and audience. Content should be engaging and accessible for the cohort and should not advantage those with prior knowledge of the topic. Information contained within the non-fiction texts must be checked for factual accuracy. Content of non-fiction texts must also relate to the wider Key Stage 2 national curriculum.  **Breakdown of marks across all texts:**   |  |  | | --- | --- | |  | **Per text** | | **Total marks** | 40 - 50 | | **Required marks for making inferences (2a), prediction (2e), making comparisons (2h), how information/narrative content is related and contributes to meaning as a whole (2f)** | approximately 50%  We would expect that the majority of these items would be weighted as making inferences | | **Required marks for retrieving information (2b), summarising main ideas (2c), giving the meaning of words in context (2a), explaining how language contributes to meaning (2g).** | approximately 50%  We would expect that the bulk of these items would be weighted as retrieval and giving the meaning of words in context | | **1 mark items** | 50 – 70% | | **2 mark items** | 20 – 32% | | **3 mark items** | 12 – 24% | | **Open response** | 65 – 85% | | **Closed response** | 15 – 35% |   NOTE: Multi-mark items which are open response should include a variety of response requirements, i.e. items where two pieces of information / inferences are required with two or three numbered answer lines and items where pupils have to organise a longer response.  NOTE: Any items created additionally to the figures specified in this specification of requirements under this contract, which are intrinsically linked to the selected texts, should be also be presented at Interim Handover. |
| **Mark schemes** | Mark schemes must be developed for all items.  The mark schemes must provide sufficient and clear guidance for teachers and markers to:   * allow marks to be allocated reliably, with consistency and accuracy * enable marking to be manageable * enable the marking of the tests to be effectively standardised * have a principle to define what is correct * include examples of responses that illustrate the range of correct responses and possible incorrect or insufficient responses. Ideally, mark scheme exemplars should be drawn from informal trialling, where the items have been trialled.   The mark schemes should:   * Clearly and succinctly communicate the marking principles for creditworthy and possible non-creditworthy responses to each item * Be straightforward to apply and recognise and reward pupils' responses appropriately |
| **Item and mark scheme design** | Prior to Interim Handover, items and mark schemes should NOT be presented in InDesign format, with Microsoft Word (or equivalent) being preferred. At Interim Handover, 10% of the items must be presented in InDesign.  From Interim Handover onwards, the items must be designed, using Adobe InDesign (STA use Adobe Creative Cloud or equivalent subject to prior agreement), such that they match as closely as possible the style of the supplied key stage 2 tests in relation to all design elements including font, font size, spacing, diagram style and illustration style. Templates will be provided to all winning bidders at the pre-trialling meeting, and the requirements of the Design Specification. It is not expected that materials used at informal trialling will be produced in design templates when being informally trialled.  Mark schemes should be submitted in Microsoft Word 2016 (or compatible subject to prior agreement) at Interim and Final Handover (see below). All content in mark schemes handed over to STA should be fully editable in Microsoft Word 2016 (or compatible subject to prior agreement) with the exception of any complex artwork or diagrams which should be embedded in the appropriate place in the document. The mark schemes should also match the style and layout of the supplied key stage 2 mark schemes as far as possible. |
| **Artwork, texts and other external materials** | **Written test item texts, artwork or data**  Where texts, artwork or data **have been commissioned**, please include the original material, contact details for the creator of the material, and a statement confirming assignment of the intellectual property rights (“IPR”) in the material from the creator to DfE. The formal assignment of the relevant IPR in the commissioned work must be completed by the Final Handover Date.  Where there is a **third party owner** of any materials, it should be referenced as described below.  **Referencing source materials and artwork**  Any materials using externally sourced **texts**, **artwork** or **data** need to be fully referenced; including title, name of copyright owner, name of the author/editor/creator, details of the edition, publisher and page/location of the material within the source. If sourced from the web, a print out of the original website, showing the relevant artwork or data must be included with the handover materials.  Where using texts from a secondary source, e.g. a book or magazine, a copy of the original source material must be purchased and provided to the STA on handover.  NOTE: As far as possible, reassurance should be provided to STA that the authors of any submitted texts have not publicly expressed that their work is not included in national curriculum tests. A list of authors who have expressed such a preference is included on page 4 of the item writing guidance in Annex E. |
| **Item classification** | The Supplier must accurately classify all items according to the fields on the item classification spreadsheet, and present the item information on the spreadsheet template supplied. An example spreadsheet is provided in Annex B and final version will be provided to successful supplier(s) at or before the start-up meeting. This spreadsheet must be finalised and included with the materials presented at Final Handover (see below). |
| **Quality Assurance** | Accuracy checks must be carried out on all the information texts submitted. This check must be carried out by a researcher / expert in the field of the subject matter.  Readability checks are also required on individual texts. The checks required are:   * Word count * Flesch-Kincaid * New Dale-Chall * New Fog Count * Spache * SMOG   The results of these checks must be reported in writing to STA. In reporting of the readability scores, please detail any dependencies or assumptions made in calculating the scores. Please also include details of the methodology used, and why that method was chosen.  At the text selection stage, a report should be provided to STA detailing the feedback on the texts from the required school visits. This report should be provided in writing to STA and may incorporate details of the accuracy check and the readability checks mentioned above. |
| **Informal Trialling** | The primary aim of informal trialling is to aid development of items and mark scheme development. Suppliers must ensure that as far as possible those individuals, or the key individual, who have devised the items (the Item Writer) conduct trialling personally so they get first hand feedback on the language being used, area being assessed, and the interpretation and understanding of the items by pupils and teachers[[1]](#footnote-2). 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.  For English reading, a minimum of 20% of the items associated with each text must be informally trialled with at least 15 children.  Pupils should be of an appropriate age and overall should show the range of abilities expected at the end of key stage 2. The items should be discussed with pupils in small groups of 4-6 pupils.  Suppliers should provide details of the volume of items they will be able to trial with their Item Writers conducting the trialling and any interviews, 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 * Informal trialling – variable costs based on trialling all texts and 20% of the items written for this contract.   There is **no requirement to collect quantitative data** 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.  STA staff may wish to accompany the agency on a small number of visits to schools to observe so 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.  Informal trialling must be completed in order for findings to feed into the interim handover deadlines.  Expected outputs from the trials should be by exception only and 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 * Detailed amendments to items and mark schemes as a result of the trials   Qualitative feedback from the informal trial will be presented at the interim handover meeting within the Microsoft Word version of the mark scheme. |
| **Interim Handover** | Interim Handover must occur no later than **week beginning 6 August 2018** (see table in section titled “Project Deliverables/Outputs and Critical Steps” above)**.**  If insufficient items are selected for Final Handover to fulfil the requirements of the work package, the supplier must provide substitute items which have been through the full process.  To provide copies of all materials – including amendments following informal trialling – that are proposed to go forward to final handover. Where final versions are not available, a sketched outline or layout of any proposed illustrations or graphics (if you choose to include artwork) should be provided, or a suitable placeholder graphic.  The following materials must be sent to STA:   * InDesign files (STA uses CC 2014 or equivalent subject to prior agreement) of at least 10% of the test items in order for STA to check their compliance with the Design Specification and software compatibility. For this purpose, the files need to be submitted according to the specification and the template (provided at the start-up meetings) but do not need to be the latest or final versions of the files. Remaining items should be supplied in InDesign or MS Word (or compatible) format. * Microsoft Word 2016 (or compatible subject to prior agreement) files for all mark schemes * PDF versions of all items and mark schemes – the PDF of items and mark schemes should be compiled into two files only; one containing all test items/questions and the other containing the mark schemes. * Informal trialling comments integrated into the mark schemes for each item * Item classification spreadsheet in Microsoft Excel 2016 (or compatible), with summary table(s) showing coverage across Attainment targets and levels and any other information as indicated by the supplied template (Annex B) * For the materials being presented, provide a summary table showing coverage across the content and cognitive domains in all subjects and coverage across the assessable elements in English Reading.   As a result of informal trialling, item writing agencies will need to send to STA the following documents prior to the interim handover meeting:   * Two clean hard copies of all the Informal Trialling booklets and mark schemes / coding frames. * A set of materials containing the suggested mark-ups or amendments as a result of the informal trialling and any other items that were not trialled * A report listing the points specified and other feedback obtained during informal trialling.   Any items created additionally to the figures specified in this specification of requirements under this contract, which are intrinsically linked to the selected texts, should be also be presented at Interim Handover. |
| **Interim Review** | STA will review the materials submitted at Interim Handover. A meeting will be held between STA and the item writers to review those materials and outputs from informal trialling.  Any further changes to materials will be agreed at this meeting. The Supplier will complete these and any other agreed amendments prior to final handover. Where a text has not generated sufficient items to go forward, an alternative text must be provided with its required number of items for final handover, having been through all of the relevant processes.  Feedback will be provided at the Interim Review meeting on adherence to the Design Specification for those items submitted in InDesign format. As a result of this feedback, the Supplier may be required to provide an additional set of all materials prior to final handover to ensure compliance with the Design Specification. |
| **Final Handover** | Final Handover Meeting must occur no later than **the week commencing 22 October 2018**.  The following materials must be handed over by the Final Handover Meeting:   * **30 hard copies** of the following:   + All texts, combined items and mark schemes.   + Classification spreadsheets classifying items in terms of the attainment targets item type of each item, and other information using the template supplied.   + Copyright statement (including all formal documentation for copyright transfer). * Electronic copies of the following:   + A single Adobe InDesign (STA uses Adobe Creative Cloud or equivalent subject to prior agreement) file for each individual test item with associated links and files.   + Microsoft Word 2016 (or compatible subject to prior agreement) files for the mark schemes, split into two item sets.   + Individual PDF files for each question and its associated mark scheme (i.e. two files per question).   + A combined PDF of all items and another combined PDF of all mark schemes.   + A reference document that details the sources of any data and artwork/images used in the test items   + All artwork/images used in the test items as unflattened files with all layers intact within the image file where applicable. Please ask for clarification on specific file types which are acceptable.   + A copy or copies of the updated classification spreadsheet(s), including a table summarising the number of marks assessing each content domain reference.   + For the materials being presented, provide a summary table showing coverage across the content and cognitive domains in all subjects and coverage across the assessable elements in English Reading. * Assignments and/or licences of IPR in the commissioned and other third party works to be completed by the Final Handover Date – as stated in the PQQ and the Contract, and all documentation relating to IPR. * In addition to the handover of the above materials, the purpose of the Final Handover meeting (which will last at least one full working day) is to discuss the items and the rationale for all amends made. The meeting will be chaired by STA and take place in STA offices in Coventry or London |
| **Acceptance of Final Handover** | Following Final Handover, STA will check the provided materials. If any errors are found, all materials will be returned to the supplier for a full check and for amendments to be carried out. An error free set of materials must be returned to STA no later than two weeks after the Final Handover Date. |

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| **Performance Requirements** |
| **Quality criteria; the completed work package must contain a range of text and item types that:**   * reflect the requirements for fiction and non-fiction texts as laid out in the ‘text mapping’ section of the item writing guidance document in Annex E. * are challenging and motivating for pupils, evidence of which will be provided in the informal trialling report * expose and complement the richness of the national curriculum where possible, evidence of which will be seen in the coverage of the content domain in relation to the specification of requirements * are manageable for pupils and capable of being completed within any given time constraints eliciting optimum performance, evidence of which will be provided in the informal trialling report * provide systems of recording marking decisions which are easy to use and interpret for teachers by following guidance provided in Annex E and by following the format of previous mark schemes as seen in Annex F * reflect good classroom practice * are independent of and different to all other marks submitted * comply with all requirements of the regulatory framework * meet the criteria on pages 17 to 27 in the above specification as appropriate to the subjects awarded.   **Accessibility**  The items in standard or modified form must be capable of being used by all pupils working within the targeted levels who have followed the key stage 1 or key stage 2 programme of study for the relevant subject, including;   * Those with special educational needs * Those for whom English is an additional language.   Items must provide equality of access and opportunity by:   * aiming to minimise ethnic, gender and cultural bias * avoiding disadvantaging pupils from particular backgrounds * being free from overt or covert discrimination either through wording or content.   In the development of test items 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. |

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| **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. * The Supplier and any sub-contractor is required to give full access to STA representatives for inspection where requested. * 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. If any pupil data is collected as part of this project, the handling of pupil data on tests and forms must comply with the Data Protection Act. 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.  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. |

# Tenderer's Response

## Key Stage 1 English reading

Please indicate below how many work packages your organisation is submitting a bid for. If bidding for more than one please rank in order of preference.

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| **Work Package 1** |  | **Work Package 2** |  |

|  |  |
| --- | --- |
| **Single Point of Contact:** |  |
| **E-mail:** |  |
| **Phone:** |  |

Bidders are required to respond to all of the questions in this section. The weighting for each question is provided next to each question.

Please note that the method of scoring each of the questions will be a 4 point scale, evaluators will use this to assign a score to each evaluation question response:

|  |  |
| --- | --- |
| **Score** | **Guidance** |
| 0 | Solution has low probability of successfully delivering requirements. |
| 1 | Solution has some probability of successfully delivering requirements. |
| 2 | Solution has good probability of successfully delivering requirements. |
| 3 | Solution has high probability of successfully delivering requirements. |

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| **English Reading: Expertise in item development and design**  **Q1) Please provide (in no more than 1,000 words) details of the capability, experience and roles of the personnel\* who will be directly involved in item development. Please relate their experience to the work being tendered for, explaining what they will bring to the outcomes. Please include any personnel who are external to the submitting organisation in your response.**  *This should include:*   * *those responsible for writing items and mark schemes* * *those responsible for managing/revising items and mark schemes (it is understood these may be the same as those in the category above)* * *those responsible for classifying items.* * *those responsible for undertaking the pupil interviews in trialling.*   *Please describe explicitly the role of each named individual within the project and the proportion of their time dedicated to the project. In each case, please state whether their availability for the project has or has not been secured.*  \*Please include abridged CV's of key personnel in addition to your response as a single embedded pdf file. |
| Weighting = 35% |
| ***Bidder’s response:*** |
| **English Reading: Project Management**  **Q2a) Provide a detailed project plan for this work.**  *The project plan must include:*   * *A proposed timeline with specified dates for all key milestones in the process, including (but not limited to) those listed in the Deliverables/Output section (Section 4.4).* * *The identification of all risks relevant to this piece of work and associated contingencies.*  (*STA requires a service provider which will be active in identifying risks and opportunities associated with the procurement process and the documentation it reviews, in the context of the Procurement Regulations and also ensuring that the interests of STA are adequately protected at all times.)* * *An outline of the approach that will be taken to ensure that all key administrative and technical requirements (excluding item writing/development/design) are met to time and quality, including:* * *Printing of test materials for trialling and handover* * *Meeting the design specification (for test items)* * *All other security-critical aspects*   **Q2b) In no more than 350 words, describe your approach to managing the relationship with STA .** |
| Weighting = 10% |
| ***Bidder’s response:*** |
| **English Reading: Example Test Materials**  **Q3) For work packages 1 and 2 please provide:**   * One text suitable for reading booklet 1 (at the lower end of the difficulty range) * Three items assessing the text, each assigned to a different area of the curriculum and rated according to the *English Reading Content and Cognitive domain*s. * Draft mark schemes for the items supplied * A commentary of no more than 2000 words giving rationale for the texts selected and items written.   Your items will be judged on quality, clarity of language and accessibility.  Please submit example test materials in Microsoft Word or equivalent.  *Note: the Supplier must* ***not*** *re-use items that have previously been submitted to STA under contract.  Suppliers can however reuse items previously submitted as part of a bid.* |
| **Weighting = 45%** |
| ***Bidder’s response:*** |
| **English Reading: Item Management**  **Q4) In no more than 500 words, describe how you will ensure that there will be sufficient, high quality items available to handover at the end of the project. Discuss**   1. the number of items you plan to write 2. where you would target extra item writing 3. what you would do to minimise item attrition without adversely affecting the quality of the items in the Final Handover. | |
| Weighting = 10% | |
| **Bidder’s response:** | |

**Key stage 1 English reading Pricing proposal**

The costs provided must include all charges that are applicable to the delivery of the STA Requirements. The Total Price submitted will be the fixed price included within any subsequent contract and there will be no adjustment to the contract pricing if additional charges are subsequently identified. The Tenderer must complete the cost breakdown in the attached spreadsheet in Annex C. Please ensure the totals in the spreadsheet correspond with the figures in the tables below.

**Work Package 1**

The Fixed Price to deliver **Work Package 1** in full is £ and is split into two instalments, which correspond to the critical steps, as set out in “Project Deliverables/Outputs and Critical Steps” section of the Specification of Requirements.

|  |  |  |  |
| --- | --- | --- | --- |
| **Milestone Payment** | **Requirement/Critical Steps** | **Payment Timescale** | **Amount £**  **(Excl. VAT)** |
| 1 | Interim Handover (50%) |  |  |
| 2 | Final Acceptance (50%) |  |  |
|  |  | ***Total £*** |  |

**Work Package 2**

The Fixed Price to deliver **Work Package 2** in full is £ and is split into two instalments, which correspond to the critical steps, as set out in “Project Deliverables/Outputs and Critical Steps” section of the Specification of Requirements.

|  |  |  |  |
| --- | --- | --- | --- |
| **Milestone Payment** | **Requirement/Critical Steps** | **Payment Timescale** | **Amount £**  **(Excl. VAT)** |
| 1 | Interim Handover (50%) |  |  |
| 2 | Final Acceptance (50%) |  |  |
|  |  | ***Total £*** |  |

**Key stage 1 English reading declaration by Tenderer**

I have examined the STA requirements and proposed terms and conditions and hereby offer to enter into a contract with STA for the required services at the rates and prices set out in my enclosed Pricing Proposal.

I warrant that I have the required corporate authority to sign this Tender.

I understand that STA is not bound to accept the lowest price or any Tender and that the Contract for Provision of Key Stage 1 English Reading: Item Writing will be awarded on the basis of the most economically advantageous tender.

This Tender shall remain open for acceptance by STA for a period of 30 days after the due date for return of tenders.

|  |  |
| --- | --- |
| **Signed:** |  |
| **Name:** |  |
| **Date:** |  |
| **Role:** |  |
| **Authorised to sign tenders on behalf of [organisation name]:** |  |

## Key stage 2 English reading

Please indicate below how many work packages your organisation is submitting a bid for. If bidding for more than one please rank in order of preference.

|  |  |
| --- | --- |
| **Work Package 1** |  |

|  |  |
| --- | --- |
| **Single Point of Contact:** |  |
| **E-mail:** |  |
| **Phone:** |  |

Bidders are required to respond to all of the questions in this section. The weighting for each question is provided next to each question.

Please note that the method of scoring each of the questions will be a 4 point scale, evaluators will use this to assign a score to each evaluation question response:

|  |  |
| --- | --- |
| **Score** | **Guidance** |
| 0 | Solution has low probability of successfully delivering requirements. |
| 1 | Solution has some probability of successfully delivering requirements. |
| 2 | Solution has good probability of successfully delivering requirements. |
| 3 | Solution has high probability of successfully delivering requirements. |

|  |
| --- |
| **English Reading: Expertise in item development and design**  **Q1) Please provide (in no more than 1,000 words) details of the capability, experience and roles of the personnel\* who will be directly involved in item development. Please relate their experience to the work being tendered for, explaining what they will bring to the outcomes. Please include any personnel who are external to the submitting organisation in your response.**  *This should include:*   * *those responsible for writing items and mark schemes* * *those responsible for managing/revising items and mark schemes (it is understood these may be the same as those in the category above)* * *those responsible for classifying items.*   *Please describe explicitly the role of each named individual within the project and the proportion of their time dedicated to the project. In each case, please state whether their availability for the project has or has not been secured.*  \*Please include abridged CV's of key personnel in addition to your response as a single embedded pdf file. |
| Weighting = 35% |
| ***Bidder’s response:*** |
| **English Reading: Project Management**  **Q2a) Provide a detailed project plan for this work.**  *The project plan must include:*   * *A proposed timeline with specified dates for all key milestones in the process, including (but not limited to) those listed in the Deliverables/Output section (Section 4.4).* * *The identification of all risks relevant to this piece of work and associated contingencies.* (*STA requires a service provider which will be active in identifying risks and opportunities associated with the procurement process and the documentation it reviews, in the context of the Procurement Regulations and also ensuring that the interests of STA are adequately protected at all times.)* * *An outline of the approach that will be taken to ensure that all key administrative and technical requirements (excluding item writing/development/design) are met to time and quality, including:* * *Printing of test materials* * *All other security-critical aspects*   **Q.KS2ER2b) In no more than 350 words, describe your approach to managing the relationship with STA .** |
| Weighting = 10% |
| ***Bidder’s response:*** |
| **English Reading: Example Test Materials**  **Q3)**  **a) For work package 1 please provide:**   * One narrative text intended as the either the easy, mid or hard text in the reading booklet. * Three items assessing the text, each assigned to a different area of the curriculum and rated according to the *English Reading Cognitive domain*. * Draft mark schemes for the three items supplied * A commentary of no more than 2000 words giving rationale for the proposed text and each of the five items.   Your items will be judged on quality, clarity of language and accessibility.  Please submit example test materials in Microsoft Word or equivalent.  *Note: the Supplier must* ***not*** *re-use items that have previously been submitted to STA under contract.  Suppliers can however reuse items previously submitted as part of a bid.* |
| Weighting = 45% |
| **Bidder’s response:** |
| **English Reading: Item Management**  **Q4) In no more than 500 words, describe how you will ensure that there will be sufficient, high quality items available to handover at the end of the project. Discuss**   1. the number of items you plan to write 2. where you would target extra item writing 3. what you would do to minimise item attrition without adversely affecting the quality of the items in the Final Handover. | |
| Weighting = 10% | |
| **Bidder’s response:** | |

**Key stage 2 English reading Pricing proposal**

The costs provided must include all charges that are applicable to the delivery of the STA Requirements. The Total Price submitted will be the fixed price included within any subsequent contract and there will be no adjustment to the contract pricing if additional charges are subsequently identified. The Tenderer must complete the cost breakdown in the attached spreadsheet in Annex C. Please ensure the totals in the spreadsheet correspond with the figures in the table(s) below.

**Work Package 1**

The Fixed Price to deliver **Work Package 1** in full is £ and is split into two instalments, which correspond to the critical steps, as set out in “Project Deliverables/Outputs and Critical Steps” Section of the Specification of Requirements.

|  |  |  |  |
| --- | --- | --- | --- |
| **Milestone Payment** | **Requirement/Critical Steps** | **Payment Timescale** | **Amount £**  **(Excl. VAT)** |
| 1 | Interim Handover (50%) |  |  |
| 2 | Final Acceptance (50%) |  |  |
|  |  | ***Total £*** |  |

**Key stage 2 English reading declaration by Tenderer**

I have examined the STA requirements and proposed terms and conditions and hereby offer to enter into a contract with STA for the required services at the rates and prices set out in my enclosed Pricing Proposal.

I warrant that I have the required corporate authority to sign this Tender.

I understand that STA is not bound to accept the lowest price or any Tender and that the Contract for Provision of Key Stage 2 English Reading: Item Writing will be awarded on the basis of the most economically advantageous tender.

This Tender shall remain open for acceptance by STA for a period of 30 days after the due date for return of tenders.

|  |  |
| --- | --- |
| **Signed:** |  |
| **Name:** |  |
| **Date:** |  |
| **Role:** |  |
| **Authorised to sign tenders on behalf of [organisation name]:** |  |

# Annexes

## Annex A – Test Frameworks

<https://www.gov.uk/government/collections/national-curriculum-assessments-test-frameworks>

## Annex B – Item Classification Spreadsheet

This is an example of the structure of item classification spreadsheets allowing STA to import materials directly to their item bank. Final versions of the spreadsheet for each subject will be provided to the successful supplier(s) at or before the start-up meeting.





## Annex C – Cost Breakdown

**KS1:** ** KS2:** ****

Please complete the cost breakdown for each of the work packages that you are applying for.

**Key Stage 1 Work Package 1 English Reading Item Writing Cost Breakdown**

|  |  |  |
| --- | --- | --- |
| **No.** | **Requirement/Output** | **Cost (£)** |
| 1 | Item Writing Costs |  |
| 2 | Informal Trialling – Fixed Costs |  |
| 3 | Informal Trialling - Variable Costs to trial 100% of items written |  |
| 4 | DTP Costs |  |
| 5 | Item Review Costs |  |
| 6 | Item amendment costs |  |
| 7 | Meetings, Travel and Subsistence Costs |  |
| 8 | Print and Handover Costs |  |
| 9 | Illustrations / Artwork |  |
| 10 | Other Costs (please specify) |  |
| 11 | Other Costs (please specify) |  |
| 12 | Other Costs (please specify) |  |
|  |  |  |
|  | **TOTAL COSTS** | **£** |

Additional Information

Informal Trialling - Variable Costs to trial 25% of items written - £

Informal Trialling - Variable Costs to trial 50% of items written - £

Informal Trialling - Variable Costs to trial 75% of items written - £

**Key Stage 1 Work Package 2 English Reading Item Writing Cost Breakdown**

|  |  |  |
| --- | --- | --- |
| **No.** | **Requirement/Output** | **Cost (£)** |
| 1 | Item Writing Costs |  |
| 2 | Informal Trialling – Fixed Costs |  |
| 3 | Informal Trialling - Variable Costs to trial 100% of items written |  |
| 4 | DTP Costs |  |
| 5 | Item Review Costs |  |
| 6 | Item amendment costs |  |
| 7 | Meetings, Travel and Subsistence Costs |  |
| 8 | Print and Handover Costs |  |
| 9 | Illustrations / Artwork |  |
| 10 | Other Costs (please specify) |  |
| 11 | Other Costs (please specify) |  |
| 12 | Other Costs (please specify) |  |
|  |  |  |
|  | **TOTAL COSTS** | **£** |

Additional Information

Informal Trialling - Variable Costs to trial 25% of items written - £

Informal Trialling - Variable Costs to trial 50% of items written - £

Informal Trialling - Variable Costs to trial 75% of items written - £

**Key Stage 2 Work Package 1 English Reading Item Writing Cost Breakdown**

|  |  |  |
| --- | --- | --- |
| **No.** | **Requirement/Output** | **Cost (£)** |
| 1 | Item Writing Costs |  |
| 2 | Informal Trialling – Fixed Costs |  |
| 3 | Informal Trialling - Variable Costs to trial 20% of items written |  |
| 4 | DTP Costs |  |
| 5 | Item Review Costs |  |
| 6 | Item amendment costs |  |
| 7 | Meetings, Travel and Subsistence Costs |  |
| 8 | Print and Handover Costs |  |
| 9 | Illustrations / Artwork |  |
| 10 | Other Costs (please specify) |  |
| 11 | Other Costs (please specify) |  |
| 12 | Other Costs (please specify) |  |
|  |  |  |
|  | **TOTAL COSTS** | **£** |

Additional Information

Informal Trialling - Variable Costs to trial 25% of items written - £

Informal Trialling - Variable Costs to trial 50% of items written - £

Informal Trialling - Variable Costs to trial 75% of items written - £

## 

## Annex D – National curriculum Test Design Specifications

The most up to date Test Design Specifications will be supplied no later than the pre-trial meeting.

**Annex E – Guidelines for KS1 and 2 Reading item writers**

****

**Annex F – Links to past papers / test frameworks on GOV.UK**

**Key Stage 1 Reading test framework**

<https://www.gov.uk/government/publications/key-stage-1-english-reading-test-framework>

**Key Stage 2 Reading test framework**

<https://www.gov.uk/government/publications/key-stage-2-english-reading-test-framework>

**Key Stage 1 Reading 2016 test materials**

<https://www.gov.uk/government/publications/key-stage-1-tests-2016-english-reading-test-materials>

**Key Stage 1 Reading 2017 test materials**

<https://www.gov.uk/government/publications/key-stage-1-tests-2017-english-reading-test-materials>

**Key Stage 2 Reading 2016 test materials**

<https://www.gov.uk/government/publications/key-stage-2-tests-2016-english-reading-test-materials>

**Key Stage 2 Reading 2017 test materials**

<https://www.gov.uk/government/publications/key-stage-2-tests-2017-english-reading-test-materials>

Design files will be supplied to successful suppliers once Start-up meetings have taken place.

1. People trialling items must have prior knowledge, preferably through integral involvement in origination, but minimally through having reviewed and discussed the materials with the Item Writers. [↑](#footnote-ref-2)