

**Invitation to Quote (ITQ)**

**Contract STA-0128-10 Provision of Item Writing for Skills Tests in Literacy**

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

**TABLE OF CONTENTS**

[1 INTRODUCTION 3](#_Toc475960733)

[Purpose 3](#_Toc475960734)

[Structure 3](#_Toc475960735)

[Disclaimer and Conditions 3](#_Toc475960736)

[Freedom of Information and Transparency 3](#_Toc475960737)

[2 INSTRUCTIONS TO TENDERERS 5](#_Toc475960738)

[Tender Validity 5](#_Toc475960739)

[Proposed Contract 5](#_Toc475960740)

[Procurement Timescales 6](#_Toc475960741)

[Clarification Questions 6](#_Toc475960742)

[Preparation of Tender 6](#_Toc475960743)

[STA Point of Contact 7](#_Toc475960744)

[Confidentiality 7](#_Toc475960745)

[Conflict of Interest 7](#_Toc475960746)

[Value Added Tax 7](#_Toc475960747)

[Submission of Tenders 7](#_Toc475960748)

[Right to Reject/Disqualify 8](#_Toc475960749)

[Debriefing 8](#_Toc475960750)

[3 EVALUATION METHODOLOGY 9](#_Toc475960751)

[Basis of Award Decision 9](#_Toc475960752)

[Evaluation Process 9](#_Toc475960753)

[Award Decision 9](#_Toc475960754)

[4 SPECIFICATION OF REQUIREMENTS (SoR) 11](#_Toc475960755)

[4.1 Background 11](#_Toc475960756)

[4.2 Background to the Professional Skills Tests for Trainee Teachers 11](#_Toc475960757)

[4.3 Test Specification 11](#_Toc475960758)

[4.4 Project Deliverables/Outputs and Critical Steps 12](#_Toc475960759)

[4.5 Functional Requirements 16](#_Toc475960760)

[4.6 Performance Requirements 22](#_Toc475960761)

[4.7 Security 23](#_Toc475960762)

[5 Tenderer's Response 24](#_Toc475960763)

[5.1 Literacy 24](#_Toc475960764)

[5.2 Professional Skills Tests – Literacy: Pricing Proposal 27](#_Toc475960765)

[5.3 Professional Skills Tests – Literacy: Declaration by Tenderer 28](#_Toc475960766)

[6 Annexes 29](#_Toc475960767)

[Annex A – Test Specification 29](#_Toc475960768)

[Annex B – Item Classification Spreadsheet and Item Writing Template(s) 29](#_Toc475960769)

[Annex C – Sample Tests 29](#_Toc475960770)

Annex D- Transfer of Intellectual Property Rights (IPR) to DfE template…………………………………… 30

[Annex E – Test Development External Suppliers’ Security Policy 30](#_Toc475960773)

# INTRODUCTION

## Purpose

* 1. This ITQ has been issued by the Standards and Testing Agency (STA) for the purpose of securing items in Literacy for the Professional Skills Tests for prospective teachers (‘the Item Writing Services’). STA is responsible for developing the Professional Skills Tests on behalf of Department for Education (DfE).
  2. The delivery of the Item Writing Services will be governed by the DfE’s 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 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. Under no circumstances shall STA incur any liability in respect of this ITQ or any supporting documentation and STA will not reimburse any costs incurred by Tenderers or potential Tenderers in connection with preparation and/or submission of their Tenders.
  3. The information contained within this document is confidential and should not be disclosed except for purposes related to the completion of the Tender.

## 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 at STA, 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 STA’s standard Contract for the Provision of Item Writing Services. The contract number for this subject is provided in the table below:

|  |  |
| --- | --- |
| **Subject** | **Contract Number** |
| Professional skills tests (Literacy) | STA-0128-10 |

## 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** |
| 28 February 2017 | ITQ issued to Suppliers |
| 12:00hrs, 21 March 2017 | Deadline for submission of Clarification Questions by Tenderers |
| 12:00hrs, 29 March 2017 | Closing Date for receipt by STA of Tenders |
| 26 April 2017 | Notification of Award Decision |
| 22-26 May 2017 | Proposed contract Commencement and Start-Up Meeting |

## Clarification Questions

* 1. Clarification Questions should be submitted by email only to [TendersTD.STA@education.gov.uk](mailto:TendersTD.STA@education.gov.uk), copying [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 Skills Tests 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 the 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 contacts identified in paragraph 2.12.
  2. All communications should be clearly headed ‘Provision of Skills Tests 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 Revenue and Customs. 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, written 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 Microsoft Word 2010 (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 Microsoft Word 2010 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. Tenders must be received by 12:00 noon on 29th March 2017.
  2. Tenders will be accepted at any time up to this deadline but will not be opened or evaluated until the deadline has passed.
  3. 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 (see question 1) | 35% |
| Project management (see question 2) | 20% |
| Example test materials (see question 3) | 45% |

* (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. The Work Packages are identical in content and as such the Tenderer with the highest combined score will be awarded one Work Package for the subject and the Tenderer with the second highest combined score will be awarded one Work Package. STA reserves the right to award both work packages to a single supplier in the event only one supplier scores higher than the Quality Threshold.
  2. STA reserves the right to withhold awarding Work Packages for a particular subject if no suppliers pass the Technical Score. or costs exceed the approved budget.
  3. 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)

## 4.1 Background

Section 4 of this ITQ sets out the Specification of Requirements (SoR) with respect to the items and marking criteria for the tests.

It is STA’s intention that the Item Writing Services for each subject will be split into two work packages and divided between two suppliers, although STA reserves the right to award a contract for a whole subject to a single supplier in the event that only one suitable Tender is received.

All work packages are to assess across the range of syllabus areas and item types covered by the test specification for the subject (please refer to Annex A).

Please note that STA is using 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 may be provided with more specific details regarding the question writing brief including the required breakdown across syllabus areas and item types, which they will be required to follow. Please note that for Literacy this detail has been included in the Literacy item writing guidance document (Annex B).

## 4.2 Background to the Professional Skills Tests for Trainee Teachers

All applicants to initial teacher training are required to pass the skills tests before starting their initial teacher training course.

The literacy skills tests:

* cover the core skills that teachers need to fulfil their professional role in schools, rather than the subject knowledge required for teaching. This is to ensure all teachers are competent in literacy, regardless of their specialism;
* do not replace the GCSE grade 4/5 equivalence entry requirement;
* include only questions which are set in educational contexts that are relevant to the professional role of a teacher; and
* are on-screen assessments and can be taken at test centres throughout the UK.

## 4.3 Test Specification

Items should be written against the test specification included in Annex A. Please note that this specification differs from the version that is currently on the website; the version on the website should not be used for item writing purposes. The test specifications provide details of the test model for each subject, along with details of question types and curriculum coverage. Tenderers should refer to these, along with the item writing templates and item classification spreadsheets (Annex B) and the sample test materials (Annex C) to better understand the test models and associated item writing requirements.

Since the tests are administered online, there is no design requirement associated with this work. Questions will be submitted within item templates provided using Microsoft Word. Please refer to Annex B for details of item writing templates.

## 4.4 Project Deliverables/Outputs and Critical Steps

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, and by the milestone date set. Failure to provide confirmation in your proposal documents may result in your proposal being rejected.

*The specific date for all Requirements 1 – 7 must be included within the project plan in the response to the Technical Evaluation.*

| **No** | **Deliverables/Outputs** | **Acceptance Criteria** | **Due Date** |
| --- | --- | --- | --- |
| **1** | **Start-Up Meetings**  Provide:   * Detailed plan for item development and scoring production for review and joint sign-off; * Detailed project risk and issue log (Risk Log) for review and joint sign-off. | Project Director / Project Manager (or equivalent) attend the Start-Up Meeting and provision of listed documents by agreed date. | 22-26 May 2017 |
| **2** | **Checkpoint Meetings and Management Information**  To attend two Checkpoint meetings. These meetings may be held as telephone conference calls, and may also be combined with other meetings if appropriate. Checkpoint reports to be submitted to STA one working day in advance of each Checkpoint meeting. | Project Manager (or equivalent) attends each Checkpoint Meeting on agreed date and submission of Checkpoint report one working day in advance of each Checkpoint Meeting. | **3/7/17 and 14/8/17** |
| **3** | **Text Selection Meeting**  Provide 150% of the required texts for the punctuation and grammar sections and 200% for comprehension sections from which the final texts will be selected for further development and item writing.  For grammar and comprehension texts, provide assurance that the texts submitted 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 specific strands of the syllabus, to be submitted to STA at least one week in advance of the text selection meeting. | Project Director / Project Manager (or equivalent) attend the text selection meeting and provide texts and potential questions a week in advance for consideration. | **Text to be submitted no later than 9/6/17**  **Text selection meeting to be held on (one of) 20 or 21/6/17** |
| **4** | **Interim Handover – Critical Step**  Provide electronic copies of all draft item, marking guidance, draft item classification spreadsheet(s), a completed item audit template and details of copyright details for all items where this is relevant.  The Contractor must handover 100% of the items in Microsoft Word format at the interim handover stage, with all items to be recorded on the item classification spreadsheet and the IWA item audit template. The Contractor must also handover a single pdf file of all items for each subject area (i.e. four pdf files in total, one for spelling, one for punctuation, one for grammar and one for comprehension).  Templates for item writing, the item classification spreadsheet and the IWA item audit template are provided in Annex B. Please use the templates provided; guidance on how to use the item writing templates can be found in the item writing guidance document also provided in Annex B.  N.B. Should STA decide that a final handover meeting is not needed, they may request at the interim handover meeting that parts 1 and 2 of the final handover process be combined to require electronic and hardcopy handover be provided to the part 1 dates. | 100% of drafts of all materials required for completion of work package(s) received electronically, including completed handover form, by agreed date and to criteria specified in section 4.5. | **No later than   28/7/17** |
| **5** | **Interim Review Meeting**  Meeting with STA and item writers to review materials. | Project Manager / Lead Item Writer attend Interim Review Meeting on agreed date. | **week commencing 7/8/17** |
| **6** | **Final Handover**  **Part 1** – Electronic Handover of files prior to Final Handover Meeting.  **Final Handover Meeting** – meeting to discuss amends to items. This will be held in all cases, irrespective of the number of changes required at interim handover.  **Part 2** – Updated Electronic Handover of files and final Hardcopy Handover following changes discussed and agreed in the Final Handover Meeting.  *Electronic handover* – Supplier to hand over a Word file for each item with all sections populated as detailed in the item writing guidance document. Also to be provided:   * a single pdf file of all items for each subject area (i.e. four pdf files in total, one for spelling, one for punctuation, one for grammar and one for comprehension) * a single word file containing all of the spelling templates * source references and one hard copy for all comprehension items * details of the copyright statement for the source materials (where applicable) * completed IWA item audit template * completed item classification spreadsheet. * signed copy of assignment/licences of IPR for DfE’s benefit   The preferred method of electronic handover is via the STA secure portal. The Contractor must also handover a single pdf file of all items for each subject area.  *Hardcopy Handover* – Supplier to hand over hard copies of the literacy items. | 100% of specified materials received at STA by agreed date, including completed handover form, and materials are of appropriate quality as listed under Performance Requirements. | **Part 1 – 1/9/17**  **Final Handover Meeting – w/c 11/9/17**  **Part 2 – 20/9/17** |
| **7** | **Acceptance of Final Handover materials – Critical Step**  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 should be returned no later than one week after the Final Handover date. | 100% of specified of materials with STA no later than one week after Final Handover Date, including completed handover form. All materials to be error free. | **No later than one week after Final Handover Date** |
| **8** | **Attendance (virtual acceptable) at Resolution meeting following ER1**  The item writing agency will be invited to attend the resolution meeting following ER 1 to allow them to engage with feedback from the expert review process and understand how the items were amended for trialling. | Attendance by at least 1 member of the IWA team | **19/10/17** |

## 4.5 Functional Requirements

|  |  |
| --- | --- |
| **Functional Requirements** | |
| **Assessment type** | Professional Skills Tests for prospective teachers |
| **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, for example following the interim review meeting.  Audio files are NOT required for any items. STA will produce audio files once items have been accepted for further use. |
| **Item writing requirements for literacy** | **4.5.1 Literacy**  The items are intended to cover the range of topic areas and question types detailed within the test specification, to ensure an even distribution of coverage across the given areas.  **Test format for live test**  Four sections:   * Spelling (10 marks) * Punctuation (15 marks) * Grammar (8-12 marks) * Comprehension (8-12 marks)   Please refer to the test specification (Annex A) for more detail on test format and composition.  **Work package requirements**  In each of work packages 1 and 2 STA requires 234 marks of skills questions.   |  |  |  |  | | --- | --- | --- | --- | | **Topic** | **Number of questions** | **Marks per question** | **Total marks** | | Spelling | 30 | 1 | 30 marks | | Punctuation | 3 | 20 | 60 marks | | Grammar | 8 | 8 | 64 marks | | Comprehension | 4 passages with 4-8 questions per passage | 20 marks overall | 80 marks |   Please note that there is a text selection meeting for the literacy tests. Suppliers are asked to provide 166% of passages required for punctuation, 150% of passages required for grammar and 200% of the passages required for comprehension in advance of this meeting, from which the final 100% will be chosen.  Additional detail regarding item types and marks per question are provided below.  ***Spelling***  All questions to be based on the following item types:   1. Sentence with ‘fill in the blank’. 2. Sentence with drag and drop multiple choice options for Hearing Impaired.   Note: Both standard and hearing impaired versions of spelling questions will use the same sentence.  For each work package the supplier must provide:   * 4 alternatives for each spelling for the Hearing Impaired version to include likely common errors.   Details of the types of spellings have been expanded and the new specification provides details. Spellings and sentences should not be obscure or very specific to a specialist area. Sentences must not be unnecessarily complex.  They must broadly reflect the lexicon of general professional writing. More detail will be provided at the Start-Up Meeting including a list of between 10 and 15 target spellings we wish to be tested.  A total of 30 marks are to be provided, including the words supplied by STA.  ***Punctuation***  All questions to be based on the following item type:   1. a ‘passage proof-read’ question type where candidates add missing punctuation into a passage of text to ensure unambiguous meaning and consistency of style.   For each work package the supplier must provide:   * 3 separate passages of text, each of which will include 20 instances of missing punctuation; 1 mark per missing piece of punctuation.   A total of 60 marks will be provided.  Punctuation of varying difficulty levels should be missing from each passage. Care must be taken to avoid obvious errors such as adding the missing half of paired pieces of punctuation e.g. one bracket or one quotation mark where there is little or no ambiguity about the placement of the missing punctuation.  All stylistic non-essential punctuation that is not being tested must be included to avoid ambiguity for candidates.  The Punctuation section should be handed over in the form of the punctuation scoring template provided, alongside the punctuation word template provided in Annex B.  ***Grammar***  All questions to be based on the following item type:   1. single mark multiple choice drag and drop item questions where the candidate has to select the most appropriate option for a given sentence. This can include whole sentences and complex phrases from lists, as well as grammatical selections within sentences.   For each work package the supplier must provide:   * 8 passages with 8 items per passage; * Each item will be worth 1 mark; * Each item always has 4 answer options.   A total of 64 marks will be provided.  ***Comprehension***  All questions to be based on the following item types:   1. Drag and drop items including:    1. Drag and drop one answer option (tick/number/words/letters) to the correct statement.    2. Drag and drop multiple answer options (ticks/numbers/words/letters) to the correct statements.   Each correctly completed option within a question is worth 1 mark. Item selection can be grouped to give a maximum of 5 marks for any one question.  For each work package the supplier must provide:   * 4 passages with 4 or more to a maximum of 8 questions per passage and up to 5 items (and marks) per question to give a total of 20 marks per passage; * Each item will be worth 1 mark. A total of 80 marks in total will be provided. |
|  |
| **Marking guidance** | Marking guidance must be provided for all items. This should be included in the completed template for each question.  The marking guidance must include details of all correct answers.  Please refer to the item writing guidance document (Annex B) for more details. For the fill in the blank spelling questions there is normally only one correct spelling to be listed, the only exception is words ending with the suffix –ise or –ize. |
| **Item design** | All items and their associated marking guidance must be submitted in Microsoft Word 2010 (or compatible, subject to prior agreement) at Final Handover using the question templates provided.  Please refer to the item writing guidance documents (Annex B) for further details on how items should be presented within the item writing templates.  For each test section, a single word and pdf file should be provided which combines all items being submitted for that test section. These combined documents should be provided both at interim handover and final handover. |
| **Texts and other external materials** | **Test item texts**  Texts must take account of the context in which they will be used. They must comply with the STA guidance for text selection which is included at Annex A.  Where texts 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.. The document in Annex G (Transfer of IPR to DfE Template) must be used when handing over texts, artwork or data that has been commissioned.  Where there is a third party owner of any materials, it should be referenced as described below.  **Referencing source materials**  Any materials using externally sourced **texts** 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 text must also be included. |
| **Item classification** | The Supplier must classify all items according to the fields on the item classification spreadsheet, and present the item information on the spreadsheet template supplied. The spreadsheet is provided in Annex B. This spreadsheet should be included with the materials presented at Interim and Final Handovers. For literacy, the IWA item audit template provided in Annex B should also be completed.  Further guidance on classification of literacy items is included within the literacy item writing guidance document. |
| **Interim Handover** | *Interim Handover must occur no later than 28 July 2017.*  The following materials must be sent to STA:   * 100% of items to be provided in Microsoft Word 2010 (or compatible subject to prior agreement), using the item templates, which will be provided at the start up meeting. * All attribute fields on the template must be completed for each item, including curriculum reference and marking key. * Item classification spreadsheet in Microsoft Excel 2010 (or compatible). * Completed IWA item classification sheet included within Annex B. * For each test section, a single word file should be provided which combines all items being submitted for that test section.   STA and the contracted agencies will review the supplied materials at the Interim Review meeting (w/c 7/8/17). The Supplier will then make any revisions or amendments as necessary as a result of the discussions at that meeting. |
| **Final Handover** | *Final Handover part 1 must occur on or before1/9/17.*  The Final Handover Meeting Part 1, w/c 11/9/17 where any amends needed are discussed and/or the project is reviewed then Final Handover Part 2 occurs with any changes on 20/9/17.  Should STA decide that a final handover meeting is not needed, they may request at the interim handover meeting that parts 1 and 2 of the final handover process be combined to require electronic and hardcopy handover be provided to the part 1 dates.  **Part 1** – Electronic Handover of files prior to Final Handover Meeting.  **Final Handover Meeting** – the purpose of the Final Handover meeting (if required) is to discuss the items and the rationale for all amends made. The meeting will be chaired by STA and either take place in STA offices in London or by telephone (to be decided by STA). Following the Handover Meeting the agreed changes must to be made prior to handover Part 2.  **Part 2** – Updated Electronic Handover of files and final Hardcopy Handover following changes discussed and agreed in the Final Handover Meeting.  *Electronic handover (parts 1 and 2)*   * 100% of items to be provided in Microsoft Word 2010  (or compatible subject to prior agreement), using the item templates included within Annex B. * A reference document that details the source of any text used in the test items. * The updated item classification spreadsheet(s). * Completed item classification sheet included within Annex B.   For each test section, single pdf and word file should be provided which combines all items being submitted for that test section. Assignments and/or licences of IPR in the commissioned works (Appendix E)to be completed by the Final Handover Date – as stated in this ITQ and the Contract, and all documentation relating to IPR.  Electronic handover will take place either via the STA portal (preferred) or by encrypted memory stick (provided by STA); approach to be agreed at the Start-up Meeting.  *Hardcopy Handover* – Supplier to hand over hardcopies of the literacy items, including marking guidance and item classification spreadsheet. Up to 20 hard copies of all items, to be collated into 20 separate, individually numbered packs. Exact number to be agreed at the Interim Handover Meeting. |
| **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 should be returned to STA no later than one week after the Final Handover date. |

## 4.6 Performance Requirements

|  |
| --- |
| **Performance Requirements** |
| **Quality criteria; the completed work package must contain a range of items that:**   * are suitably challenging and motivating for candidates; * assess the breadth of the skills test curriculum as detailed in this ITQ, the item writing guidance document and any additional guidance provided at the start-up meeting; * are manageable for candidates and capable of being completed within any given time constraints eliciting optimum performance; * cover a range of contexts, which are relevant to education or the teaching profession. Since the tests will be completed by candidates prior to starting their teaching qualification, contexts should not require detailed knowledge or experience of the teaching profession; * contain only plausible contexts and data; * reflect good assessment practice.   **Accessibility**  The items must be capable of being used by all candidates working at the target level for the tests, including:   * those with special arrangements to access the tests; * 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 candidates 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.  General guidance on various aspects of accessibility has been developed by organisations on behalf of the STA. Item writing agencies are required to review their items to ensure compliance with this guidance prior to submission. |

## 4.7 Security

|  |
| --- |
| **Security** |
| The Supplier must meet the following security requirements:   * The Supplier will comply with the STA's security procedures to maintain the integrity of all materials produced. * The Supplier 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. Candidate data is confidential. If any candidate data is collected as part of this project, the handling of candidate data on tests and forms must comply with the Data Protection Act. * 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, Appendix H for further information with regard to the security of the test materials and compliance to the Security Policy Framework (SPF) completed as part of the Pre-Qualification Questionnaire (PQQ).   **Security Compliance**   * Supplier 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. * under no circumstances will the supplier and any sub-contractor contact IPR holders of any selected texts. This is strictly prohibited.   In the event that STA, in its sole discretion, considers that the required Security policies or processes have not been implemented by the Supplier 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

## 5.1 Literacy

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

|  |  |
| --- | --- |
| **Professional skills tests – Literacy: Expertise in item development for initial teacher trainees**  **Q.L1) 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 indicate any roles / personnel who are external to the submitting organisation. Please confirm that key personnel, including those external to the organisation, are available for the dates listed in the ITQ and in the event that named personnel are not available at key points in the process, please indicate how their absence will be covered.**  *This should include:*   * *those responsible for writing items and marking guidance;* * *those responsible for managing/revising items and marking guidance (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, including an indicative number of days. In each case, please state whether their availability for the project has or has not been secured.*  \*Please include abridged CVs of key personnel in addition to your response focusing on experience relevant to this contract. | |
| Scoring:  *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* | Weighting  35% |
|  | |
| **Professional Skills Tests – Literacy: Project Management**  **Q.L2a) 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 particular 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:* * *outlining the number of items you intend to write, and explain how this will be sufficient to hand over the required materials;* * *complying with the requirements of the item writing templates;* * *all other security-critical aspects.*   **Q.L2b) In no more than 350 words, describe your approach to managing the relationship with STA.** | |
| Scoring:  *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* | Weighting  20% |
|  | |
| **Professional Skills Tests – Literacy: Example Test Materials**  **Q.L3) Please provide:**   * one example question and its accompanying marking guidance for each of spelling, punctuation, grammar and comprehension sections, which are based upon the item types outlined within this ITQ and the test specification. Each question should contain a minimum of 2 items, based on the accompanying text as appropriate; * identification of possible candidate misconceptions that may arise; * a commentary of no more than 2,000 words giving rationale for the selected items and texts.   Your items will be judged on quality, clarity of language, appropriateness of contexts and the extent to which items are absent of issues of bias and construct irrelevant variance.  Please submit example test materials in Microsoft Word or equivalent, using the item writing templates provided in Annex B. | |
| Scoring:  *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* | Weighting  45% |
|  | |

## 5.2 Professional Skills Tests – Literacy: 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 Fixed Price to deliver **Work Package 1** or 2 in full is £ and is is payable in a single instalment, which corresponds to the Acceptance of Final Handover materials, as set out in Section 4.4.

|  |  |  |  |
| --- | --- | --- | --- |
| **Milestone Payment** | **Requirement/Critical Steps** | **Payment Timescale** | **Amount £**  **(Excl. VAT)** |
| 1 | Acceptance of final handover materials (100%) | 25/10/2017 |  |
|  |  | ***Total £*** |  |

Test development is VAT exempt

The Tenderer must complete the cost breakdown.

|  |  |  |
| --- | --- | --- |
| **No** | **Requirement/Output** | **Work Package  Costs £** |
|
| 1 | Item Writing Costs |  |
| 2 | Item Review Costs |  |
| 3 | Item Amendment Costs |  |
| 4 | Meetings, Travel and Subsistence Costs |  |
| 5 | Print and Handover Costs |  |
| 6 | Other Costs (please specify) |  |
| 7 | Other Costs (please specify) |  |
| 8 | Other Costs (please specify) |  |
| 9 | Other Costs (please specify) |  |
|  |  |  |
|  | **TOTAL COSTS** | £ - |
|  |  |  |
|  | VAT is not applicable |  |

## 5.3 Professional Skills Tests – Literacy: 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 **Professional Skills Tests (Literacy): 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 Specification

The attached documents are the test specifications to be used by item writing agencies. Please note that the versions currently on the website are different to these and should **not** be used for item writing purposes.



Additional detail to inform item writing may be provided during the Start-up Meeting.

## Annex B – Item Classification Spreadsheet and Item Writing Template(s)

These are the item classification spreadsheets that STA is using to audit Skills Test items and must be populated with details of all items submitted to STA for this contract.



These are the item writing templates, which should be used for input of all questions/items. A guidance document is also provided for each subject which includes details of how the items should be used, along with details on house style, syllabus, item type coverage and our inclusion guidance.







## Annex C – Sample Tests

Practice materials are available via the DfE website. The practice materials reflect the question types and format of the live tests.

In order to access the practice tests, you need to register an account (using the activation key: **jhULiqgX)**, full details and guidance on how to register can be found on the DfE website: <http://sta.education.gov.uk/>

**Annex D– Transfer of Intellectual Property Rights (IPR) to DfE Template**

****

## Annex E– Test Development External Suppliers’ Security Policy

