

## Schedule 3 – Form of Call-Off Contract

<b>Modified Test Framework Agreement – STA-0299</b>
<b>Call-Off Contract No: STA-0299-02-02</b> <b>Jaggaer Ref: Con_25518</b>
<b>Title: Modified Tests Framework 2023-2026 Call-Off 02 Work Package 2 - KS2 live tests in 2025; Helpline; and past papers service for KS1 and KS2</b>
<b>Supplier: Gwasg Pia Cyfyngedig (Pia)</b>

### Pursuant to the terms of the Modified Test Framework Agreement (STA-0299):

<b>Service Commencement Date:</b>	01 July 2024
<b>Call-Off Contract End Date:</b>	30 June 2025
<b>Call-Off Contract Value:</b>	£115,127
<b>Relationship Manager for Department for Education:</b>	██████████
<b>Contract Manager for the Department for Education:</b>	██████████
<b>Relationship Manager for the Supplier:</b>	██████████
<b>Contract Manager for the Supplier:</b>	██████████

### 1. Background

STA requires services for development and delivery of modified versions of National Curriculum Tests for the period July 2024 - July 2025. This contract is for Work Package 2 of the Modified Tests Framework 2023-2026 Call-off 02. Work Package 2 will include:

- Development of KS2 live tests for use in 2025
- Development of draft proofs for all KS2 TPT items:
  - GPS (N/A)
  - Maths (approx. 165 new reasoning items)
  - Reading (approx. 160 items and 6 texts)
- Review of KS2 Item Validation Trial (IVT) materials:
  - GPS (approx. 200 items)
  - Maths (N/A)
  - Reading (N/A)
- Review of proposed KS2 English reading texts (approx. 9 texts)
- Provision of a helpline and past papers service and validation of orders for KS1 and KS2 test materials
- Will need to have the facility to take delivery of excess stock of past papers
- Will need to have the facility to take delivery of RBA surplus physical resources.

## 2. Functional Requirements

This section outlines the specific functional requirements for the delivery of Work Package 2 in this Call-off. Tenderers should also refer to the Modified test framework for all specifications of requirements. The relevant requirement reference numbers are noted, where applicable, in brackets within each section.

For Service level agreement / quality standards refer to the Modified Tests Framework.

General functional requirements	
<b>Data</b>	STA will provide access to a secure portal for the transfer of data from the Supplier to STA.
<b>Contract variations and change control management</b>	<p>STA requires a change request for <b>all</b> variations to the contract. This includes instances where there is a nil, reduction or increase to costs.</p> <p>Each change request must clearly state the original amount bid, the total variation amount, a breakdown of the variation figure included and the reasons why the change is required. This information should be provided regardless of who requested the initial change. (See Document 6 – Change request template.)</p>
<b>Documentation format</b>	<p>Mark-ups must be provided as electronic mark ups in PDF at each stage and following the naming conventions as shown in the example below (GPS used as an example):</p> <ul style="list-style-type: none"><li>• STA187970MLp_KS2_EGPS_P1_V1</li><li>• STA187970BTp_KS2_EGPS_P1_V1</li></ul> <p>The Supplier should include a front cover confirming the version number and stage (e.g. Meeting 1 discussion proof.)</p>

### Specific Functional requirements

Deliverable	No.	Functional requirements
<b>PM - Project Management – Tenderers must also refer to the Modified Tests Framework (PM.1 – PM9)</b>		
<b>Project Initiation Document (PID)</b>	<b>PM.2</b>	<p>The Supplier must submit a Project Initiation Document (PID) which clearly sets out the project for the delivery of services at the outset of the call-off.</p> <p>The PID must cover all aspects of the delivery of the Project, including operational delivery, governance, and interfaces with other organisations. The PID must include, but not be limited to:</p> <ul style="list-style-type: none"> <li>• risk management process / risk register</li> <li>• an issue log</li> <li>• a change control register</li> <li>• communication plan</li> <li>• quality plan and log</li> <li>• product descriptions (as appropriate)</li> <li>• exception reports</li> <li>• lessons learned log</li> <li>• equality plan and social value management</li> </ul>
<b>Project Plan</b>	<b>PM.3</b>	<p>The Supplier must provide a detailed project plan detailing the resources, tasks and timescales required to be performed to mobilise and deliver the Services within the Agreement together with a summary milestone plan, which details the deliverables outlined in the PID, and requirements / dependencies upon STA. Both plans are to be kept up-to-date and communicated weekly or as required to STA.</p>
Deliverable	No.	Functional requirements

<b>Process Management</b>	<b>PM.4</b>	<p>The Supplier must document, provide, and maintain all processes and procedures utilised in the delivery of the services, including interfaces with other relevant parties ensuring that all relevant standards are applied or adhered to including project management methodologies.</p> <p>The Supplier must keep a clear and comprehensive record of all electronic and hard copy papers at all times and full access must be granted to STA representatives for inspection where requested.</p>
<b>Project Closure report</b>	<b>PM.6 and MP.10</b>	<p>The Supplier must formally close the call-off order by providing a Project Closure report.</p> <p>The Supplier must conduct a review of modification, proofing and production processes and provide a lessons learnt report to inform future cycles.</p> <p>The Supplier must conduct a review of the helpline activities, processes and past paper requests using feedback from schools and STA. (See MI Template in Document 6)</p>
<b>Meetings</b>	<b>PM.9</b>	<p>The Supplier must attend any meetings as reasonably requested by STA at locations determined by STA. These will include, but not be limited to:</p> <ul style="list-style-type: none"> <li>• Weekly checkpoint meetings</li> <li>• Lessons learnt meeting</li> <li>• Senior Supplier meetings</li> <li>• Meeting with STAs modified print supplier to identify and manage dependencies</li> </ul>

<b>Deliverable</b>	<b>No.</b>	<b>Functional requirements</b>
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<b>Process walk-through meeting</b>	<b>PM.9</b>	<p>The Supplier must provide DfE/STA with a complete end-to-end process walk-through at their site, including a detailed explanation of their management of their modified development process, which can include but not be limited to:</p> <ul style="list-style-type: none"> <li>• development of materials including the production of diagrams and moulds</li> <li>• printing and collating of hardcopy test materials</li> <li>• QA processes at key stages in the process; (for example, QA checks for errors and version control).</li> </ul> <p>STA may ask the Supplier to provide an increased focus for the site walk through on certain aspects of their processes that were presented in their Tender.</p> <p>STA will provide feedback on the process and recommendations for improvements/changes. The Supplier must provide evidence of steps taken to address areas for improvement, weakness, or security concerns.</p> <p>The process walk through should be a full day, on a date to be agreed at, or shortly after the start-up meeting. It should not take place any later than 3 months from the start of the contract. It will take place at the Supplier's main base for modified development operations.</p>
<b>MI - Management Information</b>		
<b>Management Information</b>	<b>MI.1</b>	<ul style="list-style-type: none"> <li>• The Supplier must submit to STA Management Information (MI) and performance reports based on, but not limited to: Checkpoint reports.</li> <li>• Incoming and outgoing calls.</li> <li>• Emails received.</li> <li>• Receipt and validation of test orders.</li> <li>• Past papers requested.</li> <li>• General enquiries and complaints</li> </ul>

Deliverable	No.	Functional requirements
		<p>The frequency, format and content are to be agreed with STA at the Start-up meeting.</p> <p>STA reserves the right to add to the Management Information requirements during the life of the call-off.</p> <p>See Document 6 for MI example template.</p>
<b>S – Security</b>		
<b>Security Plan</b>	<b>S.1</b>	<p>The Supplier must ensure that a security manager is appointed who must have ultimate responsibility for all aspects of information governance and security management relating to the Supplier Services.</p> <p>The Supplier must produce and adhere to a security plan, based on and compliant with the principles, and outcomes required of government.</p> <p>Departments, in HMG Security Policy Framework (SPF) (see <a href="https://www.gov.uk/government/collections/government-security/">https://www.gov.uk/government/collections/government-security/</a> ). The plan shall incorporate detailed security policies, standards, and controls, which may be those the Supplier operates within an ISO27001 information security management system. This security plan shall cover all aspects of the Supplier services including physical security, infrastructure, platforms, transportation of sensitive material, applications and services and interfaces.</p> <p>The security plan shall be reviewed and approved by STA and, if necessary, must be updated to meet STA requirements prior to the commencement of the services.</p>
<b>Data policy</b>	<b>S.8</b>	<p>The Supplier must have a policy in place, to be agreed with STA, to ensure the security of data on computers and the security of data on the network.</p> <p>The Supplier must ensure that:</p> <ul style="list-style-type: none"> <li>• all computers are password-protected.</li> <li>• all computers lock automatically after five minutes of inactivity.</li> <li>• STA Data is not stored or transported on removable media devices (CD writer, DVD writer, memory sticks and similar</li> </ul>

<b>Deliverable</b>	<b>No.</b>	<b>Functional requirements</b>
		<ul style="list-style-type: none"> <li>• Data files are stored on network drives and not the local hard disk; and all portable media is encrypted</li> </ul>
<b>Data policy</b>	<b>S.9</b>	The handover of any material must be via the STA portal. If, for any reason, the portal fails, handover materials must be sent via Galaxkey.
<b>E – Equalities</b>		
<b>Equality Plan</b>	<b>E.5</b>	The Supplier must produce an equality plan for the call-off outlining their commitment and compliance to the latest Equalities Legislation and report at regular intervals (checkpoint reports). The report must also demonstrate how the Supplier continues to meet equal opportunities relating to social value management.
<b>BC - Business Continuity</b>		
<b>Business continuity plan</b>	<b>BC.2</b>	The Supplier must develop, provide, and maintain an incident management plan and business continuity plan that ensures no interruption to, or failure of, service such that successful delivery of the project is at risk.
<b>Q - Quality</b>		
<b>Quality Issues</b>	<b>Q.3</b>	The Supplier must nominate an individual who will act as the point of contact for quality issues.
<b>PQR - Performance and Quality</b>		
<b>Performance targets</b>	<b>PQR.1</b>	The Supplier must conform to performance targets in relation to quality, efficiency and adherence to the timetable as laid out in the call-off. Progress towards these targets will be regularly reviewed against agreed performance criteria. Stage payments will be linked to key milestones (critical steps) in the call-off. STA will review quality at each milestone so that payment can be agreed.



Deliverable	No.	Functional requirements
<b>Proofing process and quality assurance arrangements</b>	<b>PQR.6</b>	The Supplier must ensure that proofing follows STA's agreed proofing process and be to the highest standard. There must be appropriate proof reading and quality assurance arrangements in place to ensure that materials are handed to STA without errors at each stage of origination and proofing.
<b>ET - Exit and transition</b>		
<b>Routine exit and transition</b>	<b>ET.1</b>	The Supplier must provide and maintain a detailed, fully resourced, and costed <b>routine</b> exit and transition plan to ensure the smooth transition of Services to a successor service provider. The exit and transition plan must be signed off by STA no later than 2 months after the commencement date
<b>Emergency exit and transition</b>	<b>ET.2</b>	The Supplier must provide and maintain a detailed, fully resourced, and costed <b>emergency</b> exit and transition plans to ensure the smooth transition of Services to a successor service provider. The emergency exit and transition plan must be ready to be signed off by STA no later than 2 months after the commencement date
<b>Statement for support required</b>	<b>ET.3</b>	The Supplier must provide a detailed statement in the exit and transition plans of all its requirements for the support it requires from DfE to ensure smooth transition of service to DfE or a successor service provider at the Exit and Transition phase, whether routine or emergency.
<b>List of all assets for delivery</b>	<b>ET.4</b>	The Supplier must provide, and maintain, a list of all assets, for example materials software, data, people, contracts, and other agreements planned to be used in the delivery of services.
<b>Identified assets to be transferred to DfE</b>	<b>ET.5</b>	The Supplier must identify assets that it anticipates will be transferred to DfE on expiry or termination of the framework or on completion of any individual call-off order. The Supplier must also document the arrangements for and handing over of such materials to DfE within its exit and transition plans.
<b>EX – Expertise</b>		

<b>Specialist modifiers</b>	<b>EX.1</b>	The Supplier must identify, recruit, and manage a team of specialist Modifiers (both Visually Impaired specialists and Hearing-Impaired specialists) in order to prepare specifications for modifications.
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<b>Deliverable</b>	<b>No.</b>	<b>Functional requirements</b>
<b>Specialist MLP</b>	<b>EX.3 (MLP)</b>	The Supplier must review and comment on a 'template guidance' document provided by STA for MLP modifications, using their knowledge and experience of modified materials. This document will provide a reference point for discussions in modified meeting 1, modified meeting 2 and all proofing stages.

#### **MP - Modified Process**

The Supplier will need to ensure the requirements of each step of the modified process are met. Please note the modified process differs from previous call offs (this is reflected by the ordering of the requirements below).

Modification follows a set process. The Supplier will need to ensure the requirements of each specific meeting are met.

<b>Start-up meeting</b>	<b>MP.1</b>	<b>Start-up meeting</b> <ul style="list-style-type: none"> <li>• The Supplier must draw up a detailed modification timetable for each subject and key stage within the constraints of the call off to be agreed with STA.</li> <li>• The Supplier must develop product descriptions to manage the work to be delivered in the call-off.</li> </ul>
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<b>English Reading text review</b>	<b>MP.2</b>	<b>English Reading text review</b>  STA will provide the Supplier with several texts to review. The Supplier must use the item bank template to be provided by STA (see example in Document 6) to report outcome of their assessment. The report must provide information on all texts stating whether they: <ul style="list-style-type: none"> <li>• require no modification.</li> <li>• require modification (and suggest to what extent.)</li> <li>• are unsuitable for modification for children with special educational needs (SEN), visual impairment (VI) or hearing impairment (HI) (with an explanation why)</li> <li>• are unsuitable topics for children with special educational needs (SEN), visual impairment (VI) or hearing impairment (HI) (with an explanation why)</li> </ul>
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Deliverable	No.	Functional requirements
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<b>Item Validation Trial Report</b>	<b>MP.2</b>	<p><b>Item Validation Trial Report</b></p> <p>STA will provide the Supplier with copies of all items to be included in the Item Validation Trial (IVT).</p> <p>These will be transferred electronically via the SharePoint secure portal. All items will be provided as nonmodified designs in a PDF format.</p> <p>The Supplier must review each item and provide the outcome of their assessment in an item bank report example provided by STA (See document 6). This report must provide information on all items and state whether they:</p> <ul style="list-style-type: none"> <li>• require no modification.</li> <li>• require modification (and suggest to what extent)</li> <li>• are unsuitable for modification for children with special educational needs (SEN), visual impairment (VI) or hearing impairment (HI)</li> <li>• are unsuitable topics for children with special educational needs (SEN), visual impairment (VI) or hearing impairment (HI) (with an explanation why)</li> </ul>
<b>Technical Pre-test review</b>	<b>MP.3</b>	<p><b>Technical Pre-test review and report (pre-modification meeting 1)</b></p> <p>STA will provide the Supplier with copies of technical pre-test (TPT) items that require review and comment. These will be transferred electronically via the SharePoint secure portal. All items will be provided as non-modified designs in a PDF format.</p> <p>The Supplier must undertake a review of each item and provide the initial outcome of their assessment in an item bank report provided by STA (see document 6). This report must provide information on all items and state whether they:</p> <ul style="list-style-type: none"> <li>• require only 'template' modifications.</li> </ul>

Deliverable	No.	Functional requirements
		<ul style="list-style-type: none"> <li>• require 'non template' modifications (and outline the proposed modification)</li> <li>• are unsuitable for modification for children with special educational needs (SEN), visual impairment (VI) or hearing impairment (HI) (with an explanation why)</li> <li>• are unsuitable topics for children with special educational needs (SEN), visual impairment (VI) or hearing impairment (HI) (with an explanation why)</li> </ul> <p>For all applicable items, the supplier must provide proposed HI guidance.</p> <p><b>Modification meeting 1</b></p> <p>The Supplier, including project staff and modifiers, must attend modification meeting 1 with STA. The purpose of this meeting is to discuss and agree modifications based on the modifier's initial review of the items.</p> <p>The Supplier must take notes at the meeting and update the template provided by STA. These notes must be provided no later than 2 working days after the meeting to be signed off by STA Subject TDRs as an agreed record of decisions.</p>
<b>Draft proofs of TPT items</b>	<b>MP.4</b>	<p><b>Draft proofs -TPT items</b></p> <p>Following modification meeting 1, the Supplier must produce draft proofs for each TPT item, based on the agreed record of decisions from Meeting 1.</p> <p>The Supplier must provide all draft proofs of TPT items (electronic version only via the portal) for storage in the STA item bank. (See MP.10)</p>

Deliverable	No.	Functional requirements
		<p>These items are required for storage in the STA item bank for consideration for future tests. STA will not comment on these electronic draft proofs further before they go into the item bank.</p>
<b>Meeting with HI specialist(s)</b>	<b>MP.7</b>	<p><b>HI Meeting</b></p> <p>The Supplier must hold a meeting with HI specialist(s) to compile guidance (using a template provided by STA) to support pupils using BSL and / or lip reading. The specialists must have expertise in modifying for pupils in each subject / key stage using BSL and lip reading. This guidance will be included in the standard Test Administration Instructions (TAI) by STA.</p>
<b>Discussion proof</b>	<b>MP.5</b>	<p><b>Before modification meeting 2 (Discussion proof)</b></p> <p>Once the Standard live test has been constructed, STA will provide the Supplier with the construction information.</p> <p><i>N.B STA may not be able to provide all test construction items with a previous mark-up and therefore these will need to be created by the supplier. Please see costings sheet for estimation of numbers.</i></p> <p>The Supplier must construct modified discussion test booklets.</p> <p>The Supplier must develop a Modified Mark scheme using the templates provided. STA will also provide Standard MSA updates.</p> <p>STA will indicate if there are any changes to the Standard test following Project Board 3 (Approval board). The Supplier must incorporate those changes to the booklets.</p>

Deliverable	No.	Functional requirements
		<p>Five working days before meeting 2, the Supplier must send both electronic and hard copies of discussion proof materials (excluding electronic copies of Tactile Braille) to STA:</p> <ul style="list-style-type: none"> <li>• Discussion MLP test booklets</li> <li>• Discussion Tactile Braille</li> <li>• Discussion braille transcript booklets (including diagram sketches/specifications) •</li> </ul> <p>Discussion MTAls</p> <ul style="list-style-type: none"> <li>• Discussion mark schemes with proposed amendments (MSA).</li> <li>• Discussion model specifications (see Model specification templates in Document 6)</li> </ul> <p>At this stage, the Supplier must provide <b>3 hard copies of each document and 1 hard copy of Tactile Braille</b> which may need to be delivered via a courier to various locations at different times.). A cover sheet should be included on every document and each copy to clearly identify these are Discussion proofs for modification meeting 2.</p>

<b>Modified meeting 2</b>	<b>MP.6</b>	<p><b>Modification meeting 2</b></p> <p>The Supplier, including project staff and modifiers, must attend modification meeting 2 with STA. The purpose of the meeting is to discuss all materials and agree final modifications.</p> <p>If STA identifies any problems that could result in significant changes to an item, the details will be sent to the Supplier, prior to the modification meeting 2.</p> <p>The Supplier must maintain a complete record of decisions agreed at the meeting (updating the item bank report example provided) on the following:</p> <ul style="list-style-type: none"> <li>• Discussion MLP test booklets</li> </ul>
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<b>Deliverable</b>	<b>No.</b>	<b>Functional requirements</b>
		<ul style="list-style-type: none"> <li>• Discussion Tactile Braille</li> <li>• Discussion braille transcript booklets (including diagram sketches/specifications) • Discussion MTAls</li> <li>• Discussion mark schemes with proposed amendments (MSA).</li> <li>• Discussion model specifications (see Model specification templates in Document 6)</li> </ul> <p>The agreed decisions will then be signed off by STA.</p>



<b>First proof of all materials</b>	<b>MP.8</b>	<p><b>First proof (All materials)</b></p> <p>The Supplier must produce first proof of all materials based on the agreed record of decisions from modification meeting 2.</p> <p>The first proof must be quality assured before dispatch to STA, including a proof by the Supplier's modifier.</p> <p>All materials must be quality assured to the highest standards to ensure that the modified tests do not include any errors or unintended differences from the standard tests. This must include:</p> <ul style="list-style-type: none"> <li>• a parallel read against the standard tests to ensure changes that have taken place in the standard test have been included.</li> <li>• a review of modified documents to ensure that a consistent approach has been taken.</li> </ul> <p>The Supplier must send the first proof of all materials to STA for STA's first proofing round. The Supplier must send both electronic and hard copies of discussion proof materials (excluding electronic copies of Tactile Braille) on the same day. A cover sheet should be included on each copy to clearly identify these are First proofs.</p>
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Deliverable	No.	Functional requirements
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		<p>At this stage, the Supplier must provide <b>6 hard copies of each document and 1 hard copy of Tactile Braille</b> (which may need to be delivered via a courier to various locations at different times).</p> <p>STA will return the first proof to the Supplier with any amendments clearly marked up electronically on the PDF documents. The Supplier must make any amendments to the first proof accurately reflecting STA's mark-up.</p>
<b>Sign off proof</b>	<b>MP.9</b>	<p><b>Sign-off Proof – All materials.</b></p> <p>Following the first proofing process, the Supplier must make any amends and will produce a final sign off copy and dispatch to STA. This will include a full list of all documents produced to ensure a full set of materials is received.</p> <p>The Supplier must provide the final figures of pagination after the sign-off proofs are delivered.</p> <p>The Supplier must provide estimated paginations if requested during previous proofing stages (in a format to be provided by STA).</p>

Deliverable	No.	Functional requirements
		<p>STA will complete a sign-off proofing round, checking that all amendments have been made according to STA mark-ups from the first proof.</p> <p>If any further amendments are required as a result of errors by the Supplier, the costs of additional rounds of proofing will be borne by the Supplier.</p> <p>The Supplier must send the Sign-off proof of all materials to STA for STA's sign-off proofing round. The Supplier must send both electronic and hardcopies of discussion proof materials (excluding electronic copies of Tactile Braille) on the same day.</p> <p>A cover sheet should be included on each copy to clearly identify these are Sign off proofs (any amended versions supplied should be indicated by version number e.g. Sign off proof V.2).</p> <p>At this stage, the Supplier must provide <b>4 hard copies of each document and 1 hard copy of Tactile Braille</b> which may need to be delivered via a courier to various locations at different times.</p> <p><b>STA Head of Test Development Research (HoTDR) sign off.</b></p> <p>Following the sign-off proofing round and in preparation for the STA HoTDR sign-off, the Supplier must provide the following:</p> <ul style="list-style-type: none"> <li>• MLP test booklets - web and print ready PDF files.</li> <li>• Braille test booklets in dxb and brf format</li> <li>• Braille transcripts - web and print ready PDF files.</li> <li>• Separate cover sheets for the braille tactile in pdf, dxb and brf format</li> <li>• MTAls - web and print ready PDF files.</li> <li>• MSAs - web ready files PDF files</li> </ul>

Deliverable	No.	Functional requirements
		<p><b>Please note:</b></p> <ul style="list-style-type: none"> <li>• MTAls should include printer's marks and 3mm bleed.</li> <li>• Web ready files should have the following properties completed: File name and publisher, then be saved in PDF-A archival format.</li> </ul> <p><b>Post HoTDR sign-off.</b></p> <p>STA will provide a date and a location to the Supplier for delivery of all master templates for the production of braille artwork and Braille collation notes to hand over to the current Live Test Operations Supplier.</p> <p>The Supplier must provide a separate collation note for each subject. (See Braille collation example in Document 6)</p> <p>Once approval to print has been achieved, the Supplier must provide all remaining 'working files' to STA. STA will confirm when these are required.</p>
<b>Project close down report</b>	<b>MP.10</b>	<p><b>Project close down report</b></p> <p>The Supplier must conduct a review of modification, proofing and production processes and provide a lessons learnt report to inform future cycles.</p> <p>The Supplier must provide all draft proofs of TPT items (electronically via the portal) for storage in the STA item bank.</p>

Deliverable	No.	Functional requirements
		The Supplier must conduct a review of the helpline activities, processes and past paper requests using feedback from schools and STA. (See MI template in Document 6)
<b>GM - Guidance Materials – for administration and marking of modified tests.</b> Refer to Document 6 for a typical list of all documents.		
<b>Guidance materials</b>	<b>GM.1</b>	<p>The Supplier must produce Guidance. STA will provide the Supplier with appropriate templates and previous versions for the presentation of guidance information as follows:</p> <ul style="list-style-type: none"> <li>• MTAls - general and test-specific guidance on how to administer the modified tests to pupils with visual impairment.</li> <li>• Guidance for pupils with a hearing impairment (pupils who use sign language or oralist support) to be provided for inclusion in the TAI/TAG.</li> <li>• If models are required, guidance on how the test administrator should introduce these to pupils must be provided.</li> <li>•</li> </ul>
<b>Mark Scheme amendments</b>	<b>GM.2</b>	The Supplier must produce guidance documentation to assist markers to mark the modified versions of the questions, making explicit the differences between the standard and modified mark schemes for each test to enable markers (or teachers in the case of key stage 1 tests) to mark the tests accurately. STA will provide templates after start-up.
<b>BP - Braille Papers</b> <p>The test booklets and supporting materials for each subject and key stage must be transcribed to braille along with any modifications or amendments as agreed. A transcript of each braille booklet and set of supporting materials must also be produced, so that it is clear to a non-braille reader exactly what each test contains.</p>		

Deliverable	No.	Functional requirements
<b>Braille versions of all tests</b>	<b>BP.1</b>	<p>The Supplier must construct a braille version of each test in time for modification meeting 2, along with any required supporting materials (for example a Reading booklet). Any suggested amendments from modification meeting 2 will need to be actioned for the First Proof.</p> <p>All Braille should be in Unified English Braille (UEB) and must meet the following minimum criteria:</p> <ul style="list-style-type: none"> <li>• KS2 braille papers ('Braille A4': 275 x 297mm), bound with treasury tags.</li> <li>• Contracted (Grade 2) Braille (UEB)</li> <li>• Uncontracted (Grade 1) Braille (UEB) (KS2 English reading only)</li> <li>• Diagrams can be integrated within the text, preferably appearing on the facing page to the relevant question.</li> <li>• Diagrams / sheets that pupils need to draw on should be attached loosely at the back of the test booklet.</li> <li>• Double line spacing should be applied throughout the tactile Braille (unless otherwise specified)</li> <li>•</li> </ul>
<b>Identify specific diagram or tactile images</b>	<b>BP.2</b>	<p>The Supplier must devise a method for pupils to clearly identify specific parts of a diagram or tactile image where a particular item requires it (for example, identifying a particular column on a bar chart).</p>

<b>Braille transcripts</b>	<b>BP.3</b>	The Supplier must provide a transcript of all braille test booklets for all tests, and of all braille supporting materials.
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<b>Deliverable</b>	<b>No.</b>	<b>Functional requirements</b>
<b>MOD - 3D Models</b> <p>The standard tests will often have a diagram showing a 3D drawing or object, or other illustration. These may need to have a simplified physical model produced, which a visually impaired pupil or pupil with learning difficulties can safely and easily handle. Guidance on how the test administrator should introduce the model(s) to pupils must also be provided.</p>		
<b>Model specification</b>	<b>MOD.1</b>	<p>Based on the content of the standard version of the test, the Supplier must advise where the production of a model(s) will help a visually impaired pupil to access a question and, based on their expertise, suggest suitable specifications for the production of the model(s).</p> <p>The suggested specification for models should be appropriate for the age group, be safe to handle and be durable.</p> <p>The specification for any models must be provided five working days before Modification meeting 2.</p> <p>The Supplier must use the template provided ensuring they include, as a minimum, the dimensions, materials, colours, and a 3D technical diagram. (See template in Document 6)</p>
<b>Guidance on model use</b>	<b>MOD.2</b>	The Supplier must provide guidance to test administrators on the use of the models and any additional guidance applicable to the mark scheme. (See GM.1)

**MLP - Modified Large Print**

In the Modified Large Print (MLP) version of the tests, the layout of questions can be amended; text and images can also be simplified or completely removed if not needed for visually impaired pupils to access and answer a question.

<b>MLP version of test booklets</b>	<b>MLP.1</b>	The Supplier must construct and deliver MLP versions of each test booklet five working days before Modification meeting 2, along with any required supporting materials (for example, a Reading booklet). STA will provide test booklet templates. The MLP versions must currently meet the following minimum criteria:
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<b>Deliverable</b>	<b>No.</b>	<b>Functional requirements</b>
		<b>KS2 English reading; English grammar, punctuation, and spelling; and mathematics</b> <ul style="list-style-type: none"><li>□ A4, saddle-stitched booklets</li><li>□ Text size: 24pt (&amp; 32pt for words that are 'bold')</li><li>□ Font: Arial Bold</li></ul>

**HI - Hearing Impairment - Materials to support hearing impaired (HI) pupils or those who use sign language.**

Support materials for hearing impaired (HI) pupils must be produced for tests where elements of the test will be read aloud by a teacher or administrator to pupils.



<b>Hearing impaired support materials</b>	<b>HI.1</b>	<p>The Supplier must produce support materials for Hearing Impaired (HI) pupils for test materials, which are delivered orally. These may be in the form of “flash cards,” or other materials, which can be presented to pupils to aid in the understanding of test questions.</p> <p>Please also refer to GM.1 to GM.2 for HI guidance.</p>
<b>SH – Specialist Helpline</b> The Supplier must provide a specialist helpline for schools and other users of modified tests.		
<b>Helpline</b>	<b>SH.1</b>	<p>The Supplier must ensure that the Specialist Helpline is operational throughout the full relevant test cycle, i.e., from start of the school year in September through to the end of the summer term.</p> <p>The Supplier must confirm to STA that the helpline number is operational.</p>

<b>Deliverable</b>	<b>No.</b>	<b>Functional requirements</b>
<b>OM - Order Management</b> The Supplier must work with STA and the test operations Supplier to follow the validation of orders process (see example of validation of orders process in Document 6)		

<b>Validation of Orders</b>	<b>OM.4</b>	<p><b>Test Orders window:</b> October to November 2024  <b>Late orders:</b> October 2024 – June 2025</p> <p>The Supplier must ensure that all schools' orders are received and validated:</p> <ul style="list-style-type: none"> <li>• on an ongoing basis as soon as the test orders system is made available and completed within 14 days of the test orders system closing</li> <li>• within 24 hours for late orders</li> <li>• immediately for orders received the week before tests or during the test week.</li> <li>• with no more than 1% error tolerance in accuracy of data</li> </ul>
<b>PPS - Past Paper Service</b>		
Modified tests from previous cycles are often used by schools to help determine the most appropriate type of modified paper for a pupil.		
<b>Provision of past paper service</b>	<b>PPS.1</b>	The Supplier must provide an on-demand past paper service to schools that contact the Helpline requesting practice materials.
<b>Fulfil past paper orders</b>	<b>PPS.2</b>	The Supplier must fulfil orders for past papers (from three previous years' tests) in braille. Files will be supplied by STA, where needed, to fulfil these orders. (Approximately 1478 individual braille past papers ordered per year).
<b>DR - Delivery Requirements</b>		
<b>Delivery of final agreed versions of</b>	<b>DR.1</b>	The Supplier must provide STA with final agreed versions of the modified test materials in hard copy and electronic (InDesign, or compatible open artwork files by prior agreement) for printing and distribution to an agreed timeline and format.
<b>Deliverable</b>	<b>No.</b>	<b>Functional requirements</b>
<b>the modified test materials</b>		

<b>Schedule of delivery</b>	<b>DR.2</b>	The Supplier must deposit materials under development with STA in both hard and electronic copy at key stages throughout the cycle. A schedule for deposits will be agreed at the beginning of the cycle(s).
<b>Format of materials to be delivered</b>	<b>DR.3</b>	<p>Materials must be supplied at each appropriate stage in the following format:</p> <ul style="list-style-type: none"> <li>• a minimum of 2 hard copies</li> <li>• PDF files and/or open artwork files as required.</li> </ul> <p>A full list of all documents produced must be provided to ensure completeness.</p>
<b>Schedule for origination, proofing and sign off</b>	<b>DR.6</b>	The Supplier must work with STA to agree a schedule for origination, proofing and sign off.

### 3. Required Service Elements

The table below sets out the Service Elements the Supplier shall provide under this Call-Off Contract. All deliverables and outputs are categorised as mandatory, and it is essential that you confirm that you can meet them in full. All dates are negotiable with STA unless stated as fixed. The work package plan will be baselined after the start-up meeting.

<b>Work strand</b>	<b>No.</b>	<b>Deliverables/Outputs</b>	<b>Package 2 Date</b>
Project Management	PM.2	The Supplier must submit a Project Initiation Document (PID)	First draft ready for Start-up meeting

<b>Work strand</b>	<b>No.</b>	<b>Deliverables/Outputs</b>	<b>Package 2 Date</b>
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Project Management	PM.3	The Supplier must provide a detailed project plan.	TBC after start-up meeting – on going until end of project.
Project Management	PM.4	The Supplier must document, provide, and maintain all processes and procedures utilised in the delivery of the services, as outlined in this call off.	1 month after start- up
Project Management	PM.6 (also see MP.10)	The Supplier must provide a Project Closure report.	To be confirmed on or after startup meeting
Project Management	PM.9	The Supplier must attend any meetings as reasonably requested by STA at locations determined by STA.	Dates to be arranged on or after start-up meeting
Project Management	PM.9 – Process walk through meeting	The Supplier must present DfE / STA with a complete end to end process walk through at their site.	Dates to be arranged on or after start-up meeting
Management Information	MI.1	The Supplier is required to submit to STA Management Information (MI)	As required throughout the project
Security	S.1	The security plan shall be reviewed and approved by STA	1 month after start- up
Security	S.8	The Supplier must have a policy in place, to be agreed with STA, to ensure the security of data on computers and the security of data on the network.	1 month after start- up
Security	S.9	The Supplier must hand over any material via the STA portal.	Ongoing throughout call-off
Equalities	E.5	The Supplier must produce an equality plan for each work package.	1 month after start- up

Work strand	No.	Deliverables/Outputs	Package 2 Date
Business Continuity	BC.2	The Supplier must develop, provide, and maintain an incident management plan and business continuity plan	1 month after start- up
Quality	Q.3	The Supplier must nominate an individual who will act as the point of contact for quality issues.	1 month after start- up
Performance and Quality	PQR.1	The Supplier must conform to performance targets in relation to quality at each milestone so that payment can be agreed.	Ongoing throughout call-off
Performance and Quality	PQR.6	The Supplier must ensure that materials are handed to STA without errors.	Ongoing throughout call-off
Exit and transition	ET.1	The Supplier must provide a routine exit and transition plan.	2 months after start-up
Exit and transition	ET.2	The Supplier must provide an emergency exit and transition plan.	2 months after start-up
Exit and transition	ET.3	The Supplier must provide a detailed statement in the exit and transition plans to ensure smooth transition of service to DfE or a successor	2 months after start-up
Exit and transition	ET.4	The Supplier must provide, and maintain, a list of all assets	1 month after start -up
Exit and transition	ET.5	The Supplier must identify assets that will be transferred to DfE on expiry, termination, or completion of any individual call-off order.	1 month after start- up
Expertise	EX.1	The Supplier is responsible for recruiting a team of specialist Modifiers including visually impaired and hearing-impaired specialists.	To be confirmed at start-up

Work strand	No.	Deliverables/Outputs	Package 2 Date
Expertise	EX.3 (MLP)	The Supplier must review and comment on a 'template' guidance' document for MLP modifications using their knowledge and experience of modified materials.	To be confirmed at start-up
Modified Process	MP.1	The Supplier must attend a start-up meeting with STA.	From w/c 1 July 2024
Modified Process	MP.2	The Supplier must complete a review of English Reading text(s) and provide a written report of their suitability to STA.	To be confirmed on or after startup meeting
Modified Process	MP.2	The Supplier must complete a review of Item Validation Trial (IVT) items and complete an initial assessment of them and provide a written report to STA.	To be confirmed on or after startup meeting
Modified Process	MP.3	The Supplier must attend modification meeting 1 with STA for all KS2 subjects.  The Supplier must complete a review of the technical pre-test (TPT) items and provide a report including HI guidance. (where applicable)	To be confirmed on or after startup meeting (dates for each subject may vary)
Modified Process	MP.4	The Supplier must provide draft proofs of each TPT item. (See MP.10 for draft TPT handover)	To be confirmed on or after startup meeting
Modified Process	MP.7	The Supplier must hold a meeting with HI specialist(s) to compile guidance to support pupils using BSL and / or lip reading.	To be confirmed on or after startup meeting
Modified Process	MP.5	The Supplier must construct modified discussion test booklets.	To be confirmed on or after startup meeting

Modified Process	MP.6	The Supplier, including project staff and modifiers, must attend modification meeting 2 with STA.	To be confirmed on or after startup meeting (dates for each subject may vary)
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Work strand	No.	Deliverables/Outputs	Package 2 Date
Modified Process	MP.8	The Supplier must produce first proof of all materials.	To be confirmed on or after startup meeting (dates for each subject may vary)
Modified Process	MP.9	The Supplier must produce a final sign-off copy and dispatch to STA.	To be confirmed on or after startup meeting (dates for each subject may vary)
Sign of Proof – Pagination	MP.9	The Supplier must provide the final figures of pagination after the sign off proofs are delivered.	After sign-off proofs are finalised
Modified Process	MP.10 (Also see PM.6)	The Supplier must produce a Project close down report including handover of all TPT draft Proofs.	To be confirmed on or after startup meeting
Guidance Materials	GM.1	The Supplier must produce administration guidance as specified within the call off. (TAIs and MTAs)	5 days before meeting 2
	GM.1(HI -TPT)	The Supplier must review, submit a report, and provide guidance on the <b>TPT</b> materials for Hearing Impaired (HI) pupils.	2 days before Meeting 1
Guidance Materials	GM.1(HI -LIVE)	The Supplier must review, submit a report, and provide guidance on the <b>Live constructed tests</b> for Hearing Impaired (HI) pupils.	5 days before meeting 2

Guidance Materials	GM.2	The Supplier must produce guidance documentation to assist markers to mark the modified versions of the questions. (Mark scheme)	5 days before meeting 2
Braille Papers	BP.1	The Supplier must construct a braille version of each test.	At each proofing round

Work strand	No.	Deliverables/Outputs	Package 2 Date
Braille Papers	BP.2	The Supplier must devise a method for pupils to identify specific parts of a diagram or tactile image where required.	Before Meeting 2
Braille Papers	BP.3	The Supplier must provide a transcript of all braille test booklets for all tests, and of all braille supporting materials.	To be confirmed on or after startup meeting
3D Models	MOD.1	The Supplier must provide a model specification, where required.	Draft before meeting 2
3D Models	MOD.2	The Supplier must provide guidance to test administrators on the use of the models where required.	Before meeting 2
Modified Large Print	MLP.1	The Supplier must construct an MLP version of each test	At each proofing round
Hearing Impairment (support materials)	HI.1	The supplier must produce support materials for Hearing Impaired (HI) pupils for test materials.	To be confirmed on or after startup meeting
Order Management	OM.4	The Supplier must ensure that all schools' orders are received and validated.	Oct 2024 – June 2025
Past Paper Service	PPS.1	The Supplier must provide an on-demand past paper service to schools	Ongoing



Past Paper Service	PPS.2	The Supplier must fulfil orders for past papers in braille.	Ongoing
Delivery requirements	DR.1	Final agreed versions of the modified test materials must be supplied by the Supplier in hardcopy and electronic formats.	To be confirmed on or after startup meeting (dates for each subject may vary)
Delivery requirements	DR.2	The Supplier must deposit materials under development with STA in both hard and electronic copy at key stages throughout the cycle.	To be confirmed on or after startup meeting (dates for each subject may vary)
<b>Work strand</b>	<b>No.</b>	<b>Deliverables/Outputs</b>	<b>Package 2 Date</b>
Delivery requirements	DR.3	Materials must be supplied at each appropriate stage in the requested format	To be confirmed on or after startup meeting (dates for each subject may vary)
Delivery requirements	DR.6	The Supplier must work with STA to agree a schedule for origination, proofing and sign off.	To be confirmed on or after startup meeting (dates for each subject may vary)

4. Key Payment Milestones and Key Payment Milestones Dates

Payment will follow the completion of the Key Milestones listed at section 3. Key Payment Milestones are:

Milestone ID	Requirement/Critical Steps		Payment Date	Amount £ (excl VAT)
1	PM.2, PM.4, S.1, S.8, E.5, BC.2, ET.1-ET.5, MP.1, DR.6, EX.1,	10%	30 September 2024	
2	MP.2, MP.2, MP.5-MP.7, GM.1, GM.2, BP.2, MOD.1, MOD.2	40%	31 January 2025	
3	MP.8, MP.9, BP.1, BP.3, MLP.1, HI.1, DR.1, DR.2, DR.3	40%	30 April 2025	
4	PM.3, PM.6, MP.10, PM.9, M.1, S.9, PQR.1, PQR.6, MP.4, MP.10, SH.1, OM.4, PPS.1, PPS.2, EX.3 (MLP)	10%	31 July 2025	
			TOTAL:	

## 5. Supporting documentation

The Modified Tests Framework 2023-2026 Call-Off 02 ITT document sets out the full specification of requirements including the project deliverables, functional requirements and performance requirements. The original ITT and the supplier's response are appended to this contract document.



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

**Signed for and on behalf of the Supplier:**

Name:

[Redacted]

Title:

Managing Director

Signature:

[Redacted]

Date:


Jun 26, 2024

**Signed for and on behalf of the Department for Education:**

Name:

[Redacted]

Title:

 Associate Commercial Specialist

Signature:



(Jun 28, 2024 07:48 GMT+1)

Date:

Jun 28, 2024

