

Line Gray

**Invitation to Tender**

**Educational Psychologist resource for the Standards and Testing Agency**

Contract Ref: STA-0325

|  |  |
| --- | --- |
| Name of bidding organisation and individual from that organisation  or individual | [Please complete] |
| Name of single point of contact: |  |
| Email: |  |
| Phone: |  |
| Postal Address: |  |

**1. INTRODUCTION**

* 1. **Purpose**

This Invitation to Tender (ITT) has been issued by the Standards and Testing Agency (STA) in connection with a competitive procurement exercise (Ref: STA-0325).

STA is looking to procure a pool of Educational Psychologists to ensure that key stage 1 and key stage 2 national curriculum tests, reception baseline assessments are inclusive and accessible for all. The national curriculum tests include the year 1 phonics screening check, English reading (key stage 1 and key stage 2), English grammar, punctuation and spelling (key stage 1 and key stage 2), mathematics (key stage 1 and key stage 2) and the year 4 multiplication tables check (MTC).

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

* 1. **Structure**

This document:

* sets out the context for the required services
* outlines the planned procurement process; and
* contains a response section to evaluate the Bidder's proposed response to STA's requirements.
  1. **Disclaimer and conditions**

No information contained in this ITT or in any communication made between STA and any Bidder shall be relied upon as constituting a contract, agreement or representation that any contract will be offered.

STA reserves the right, subject to the appropriate procurement regulations, to change without notice the basis of, or the procedures for, the competitive process or to terminate the process at any time. Under no circumstances shall STA incur any liability in respect of this ITT, or any supporting documentation and STA will not reimburse any costs incurred by Bidders or potential Bidders in connection with preparation and/or submission of their responses.

The information contained within this document is confidential and should not be disclosed except for purposes related to its completion.

* 1. **Freedom of information and transparency**

STA is committed to open government and to meeting its legal responsibilities under the Freedom of Information Act 2000. All information submitted to a public authority may need to be disclosed by the public authority in response to a request under the Act. STA may also decide to include certain information in the publication scheme, which it maintains under the Act.

STA also has a commitment to the Government's transparency initiative relating to public sector suppliers, their transactions and their contracts. This includes:

* publication of Tender or Quote documentation
* publication of financial transactions relating to expenditure with third parties; and
* publication of new contracts.

If a Bidder considers that any of the information included in its response to this Invitation to Tender (ITT) is commercially sensitive, the information should be identified in the table below with an explanation of what harm may result from disclosure if a request is received, and the time period applicable to that sensitivity. Bidders should be aware that, even where they have indicated that information is commercially sensitive, STA might be required to disclose it under the Freedom of Information Act or as part of the Government's transparency arrangements.

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

**2. SPECIFICATION OF REQUIREMENTS**

**2.1 Overview**

STA is looking to recruit experienced Educational Psychologists to review versions of the assessments it develops. If there are policy changes and there are changes to the assessments in development, they would be included.

As part of the process of developing national curriculum assessments, STA includes an Inclusion Review, with the purpose to ensure our assessments are accessible to children with a range of special educational needs. Educational Psychologists will provide support to this panel by providing thorough feedback through report writing on the assessment materials that we have in development. Following this feedback, we will review any items that may pose unfair challenges to children with SEND.

**2.2 The Educational Psychologist Role**

STA is seeking individuals with prior experience as qualified Educational Psychologists who have worked with primary-aged children. In this position, you will leverage your extensive experience to assist us in tailoring our assessment questions to better meet the needs of children with Special Educational Needs and Disabilities (SEND). Your responsibilities will include reviewing assessment materials and submitting completed questionnaires. Additionally, you may be required to attend a meeting to review comments and determine how to address the concerns raised. There may be occasional requests to review and provide advice on questions as the need arises.

The expected commitment for this role is between 8 to 20 days throughout the contract duration. However, this estimate may vary depending on our ability to secure all required experts or their availability for review periods. Payment will be based solely on completed work, with no minimum requirement of days for the contract.

This position offers an opportunity to gain insights into the development of national curriculum assessments and the challenges surrounding testing and inclusion.

**The successful Educational Psychologists must:**

* be a qualified Educational Psychologist
* have experience working with primary aged children
* be flexible and available to review materials remotely in a secure location or in our Coventry or London offices, as and when required in agreement with the relevant project team
* have the capacity to meet the requirement set out in this ITT
* confirm that they are not working on the tests in any other capacity or if they are, they must provide additional information in the Further Information Section of this ITT
* be able to work within security protocols.

Subject knowledge and expertise in reviewing assessment materials is desirable but not essential. A good understanding of English reading / literacy, English grammar, punctuation and spelling, mathematics/ numeracy, including application of skills and use of data, is advantageous to this role.

The successful Educational Psychologist is expected to possess the essential skills of working methodically with high attention to detail. The ability to communicate effectively with various stakeholders, providing constructive written and verbal feedback within the remit of the brief and suggesting solutions for any problems and/or issues identified is also essential.

**2.3 Department resources**

The successful Bidders will be expected to work closely with:

* Relevant Test Development Researchers
* Relevant subject Project Managers

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

**2.4 Timescales**

The role will be for 2 years from 01 September 2024 – 31 August 2026, with the option to extend contracts for 1 additional year.

At the beginning of the Framework we will hold an induction session to explain the requirements in more detail and model the review processes. We will also use this opportunity to review our current item writing guidance with everyone on the framework. The induction sessions will be virtual and offered to be on either the 10th or 11th September 2024 to maximise attendance.

The Educational psychologist roles are not subject-specific and you will be expected to work on all subjects. Timelines for individual assignments will be defined upon commencing each test development cycle. Successful contractors will be required to confirm with the contract manager their availability for Educational Psychologist activities as requested.

Educational psychologists will review all test materials at:

1. Text selection stage (reading only)
2. Expert review 1 stage (ER1) – where applicable
3. Expert review 2 stage (ER2). For reading, this will only be for materials that haven’t been seen at ER1 – eg top up items.

Indicative work requirements (subject to change) as follows:

|  |  |  |  |
| --- | --- | --- | --- |
| **Estimated Days** | | | |
| **Subject** | **Financial Year 24/25** | **Financial Year 25/26** | **Financial Year 26/27** |
|  | | | |
| **KS1 Maths** | 4 | 4 | 4 |
|  |  |  |  |
| **KS1 Reading** | 2 | 10 | 10 |
|  |  |  |  |
| **KS1 GPS** | 4 | 2 | 4 |
|  | | | |
|  |
| **KS2 Maths** | 4 | 4 | 4 |  |
|  |  |  |  |  |
| **KS2 Reading** | 10 | 10 | 10 |  |
|  |  |  |  |  |
| **KS2 GPS** | 4 | 12 | 4 |  |

Details of the specific dates will be outlined closer to the times when work is required.

Educational Psychologists will be paid a daily rate of £500. Travel and subsistence will be paid in line with government guidelines. For overnight stays, accommodation will be paid for within the limits of government policy.

Successful experts can be reimbursed as an individual, or via a limited company. Please note that any expert being paid as an individual will be taxed at source and this work is VAT exempt.

STA is VAT registered. Assessment development is VAT exempt under VAT notice 701/30 (<https://www.gov.uk/guidance/vat-on-education-and-vocational-training-notice-70130>

Where any doubt exists with regards to VAT, Tenderers are expected to have sought clarification from HM Customs and Excise.

**3. INSTRUCTIONS TO BIDDERS**

Bidders should read these instructions carefully before completing the Tender documentation.

These instructions are designed to ensure that all Bidders are given equal and fair consideration. It is important therefore that you provide all the information asked for in the format and order specified.

The Bidder shall not make contact with any other employee, agent or consultant of the STA who is in any way connected with this procurement exercise during the period of the exercise, unless instructed otherwise by the STA.

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

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

The STA shall not be committed to any course of action as a result of:

* issuing this ITT or any invitation to participate in this procurement exercise;
* communicating with a Bidder or a Bidder’s representatives or agents in respect of this procurement exercise; or
* any other communication between the STA (whether directly or by its agents or representatives) and any other party.

Bidders shall accept and acknowledge that, by issuing this ITT, the STA shall not be bound to accept any application and reserves the right not to conclude a contract for the services for which applications are invited.

The STA reserves the right to amend, add to, or withdraw all or any part of this ITT at any time during the procurement exercise.

**3.1 Application validity**

Your application should remain open for acceptance for a period of 30 working days from the submission date.

**3.2 Proposed contract**

This contract will be let under the terms and conditions of Framework Ref: STA-0325. The contract will be for a period of 2 years (01 September 2024 – 31 August 2026). The following special terms will be applied:

* The parties acknowledge that, except for any information which is exempt from disclosure in accordance with the provisions of the Freedom of Information Act (FOIA), the contents of this Order are not Confidential Information. STA shall be responsible for determining at its absolute discretion whether any of the content of the Order is exempt from disclosure in accordance with the provisions of the FOIA.
* Notwithstanding any other term of the Order, the Contractor hereby gives consent for STA to publish the Order publicly in its entirety, including from time to time agreed changes to the Order, as well as payments made in accordance with the Order.

Bidders should set out below any concerns relating to the use of the Framework terms and conditions or Order Special Terms for this work as listed in appendix 1, noting that STA gives no undertaking to agree to any changes.

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

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

**3.3 Procurement and delivery timescales**

The proposed procurement timetable is set out below:

|  |  |
| --- | --- |
| **Date** | **Stage** |
| 25/04/2024 | ITT issued |
| 22/05/2024 | Deadline for clarification questions |
| 05/06/2024 **12.00 noon** | Deadline for submission of tenders |
| 24/07/2024 | Issuing of Award Notices |
| 25/07/2024 - 05/08/2024 | Standstill period |
| 07/08/2024 | Contracts issued |
| 01/09/2024 | Contract start date |

**3.4 Clarification questions**

Clarification requests should be submitted by e-mail only to: [TendersTD.STA@education.gov.uk](mailto:TendersTD.STA@education.gov.uk) and copied to [James.HEATHCOTE@education.gov.uk](mailto:James.HEATHCOTE@education.gov.uk)

In order to ensure equality of treatment of Bidders, STA intends to publish the questions and clarifications raised by Bidders, together with the STA's responses (but not the source of the questions), to all participants at regular intervals during the process.

Bidders should indicate if a query is of a commercially sensitive nature – where disclosure of such a query and the answer would or would be likely to prejudice its commercial interests. However, if STA at its sole discretion does not either consider the query to be of a commercially confidential nature, or one which all Bidders would potentially benefit from seeing, then STA will either:

* invite the Bidder submitting the query either to declassify the query or allow the query, along with the STA’s response, to be circulated to all Bidders; or
* request the Bidder, if it still considers the query to be of a commercially confidential nature, to withdraw the query.

STA reserves the right not to respond to a request for clarification or to circulate such a request where it considers that the answer to that request would be likely to prejudice its own commercial interests.

**3.5 Preparation of application**

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

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

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

**3.6 Confidentiality**

All information supplied by STA to Bidders must be treated in confidence and not disclosed to third parties except insofar as this is necessary to obtain sureties for the purposes of submitting the Quote.

All information supplied by Bidders to STA will similarly be treated in confidence except for the disclosure of such information as may be required in accordance with the requirements of UK government policy on the disclosure of information relating to government contracts including the Freedom of Information Act.

**3.7 Conflict of interest**

Any conflicts of interest should be declared in the bidder’s application including other work for STA that could conflict with the objective and successful discharge of these services.

**3.8 Daily rates and payment**

The daily rate will be £500.

Travel and subsistence will be paid in line with government guidelines. For overnight stays accommodation will be paid for within the limits of government policy.

Successful applicants will be paid on the completion of the relevant work.

Please note that individuals will be taxed at source and this work is VAT exempt.

**3.9 Submission of applications**

The application must be submitted in the form specified by completing the Bidder’s Response section and using Arial 12 font and in English. Word limits must be adhered to and material in excess of these limits will not be evaluated.

Bidders must submit their responses in electronic format such as - Microsoft Word (or equivalent) with their name (individual applicants) or the individuals name and organisation name (if bidding company) in the document title.

Applications must be received by midday on 5th June 2024 and should be sent to [TendersTD.STA@education.gov.uk](mailto:TendersTD.STA@education.gov.uk) and copied to [James.HEATHCOTE@education.gov.uk](mailto:James.HEATHCOTE@education.gov.uk)

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

Any application received after the deadline may be rejected unless the Bidder can provide irrefutable evidence that the application was capable of being received by the due date and time and that delivery failure was beyond their reasonable control.

**3.10 Right to reject/disqualify**

The STA reserves the right to reject or disqualify a Bidder where:

* the Bidder fails to comply fully with the requirements of this ITT, including proper completion of the format for response, or is guilty of a serious misrepresentation in supplying any information required in this document; or
* there is a change in identity, control, financial standing or other factor relating to the Bidder that impacts on the selection and/or evaluation process.

**4. EVALUATION METHODOLOGY**

**4.1 Basis of award decision**

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

Bids that meet the overall quality threshold of 66% for the bidders response section will be added to the Framework.

**4.2 Evaluation process**

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

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

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

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

**4.3 Award decision**

Applications will be reviewed individually against the stated criteria. All applicants who exceed the overall 66% quality threshold scores will be considered for inclusion on the Educational Psychologists Framework.

**4.4 Allocation of Work**

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

**4.5 Quality**

A quality assessment will be carried out upon completion of each allocated piece of work. Experts who pass the quality assessment will be eligible for later allocation according to the rules above. If the test development researcher deems the quality of your review insufficient, you will receive notification and may not be invited to carry out further reviews.

**5. BIDDER’S RESPONSE**

**Part A: Expertise and Experience as an Educational Psychologist**

**Please note that this section is MANDATORY: All applicants MUST complete this section in order to be considered for enrolment onto the Educational Psychologists Framework. Failure to provide responses to questions in this section will result in your application being rejected.**

Applications will be evaluated solely on the responses and associated evidence provided by the Bidder in this section of the ITT. Evaluation criteria set out in section 4.2 will be used for evaluating responses to questions in this section. A 66% overall quality threshold is applied to this evaluation.

If you are an organisation and wish to submit tenders for a number of individuals, you will need to submit separate tenders for each individual. The questions should be answered for that specific individual rather than the organisation.

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| --- |
| **Question** : In no more than 750 words, please provide a brief overview of your experience and skills, highlighting any work you feel would provide useful insight when advising STA as an Educational Psychologist.  Your response should include:   * Any qualifications and courses attended which you feel would benefit your; application; * Where your expertise has been used to advise in other educational settings * Any work you have previously undertaken with the Department for Education.   *Question Weighting: 100%* |
| **Bidder’s response:**  *Word count =* |

The overall technical quality threshold is 100%. The passing threshold is 66%

**Part B: Additional questions**

Please provide responses to questions in the table below. Please note that this section is not scored.

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

**Part C: Declaration by Bidder**

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

I furthermore warrant that:

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

|  |  |
| --- | --- |
| Signed | [Please complete] |
| Name |  |
| Date |  |
| Role |  |
| Authorised to sign Quotes on behalf of [organisation name] |  |

**APPENDIX: DRAFT CONTRACT**

This draft contract document is for your information only. Successful bidders will be issued with contracts following the conclusion of the procurement process.

