

DPS Schedule 6 (Order Form Template and Order Schedules)

Order Form

ORDER REFERENCE: **DFERPPU/ 22-23/082**

THE BUYER: **The Department for Education**

BUYER ADDRESS **Sanctuary Buildings, Great Smith Street,
London, SW1P 3BT**

THE SUPPLIER: **Pearson Education Limited**

SUPPLIER ADDRESS: **80 Strand, London, WC2R 0RL**

REGISTRATION NUMBER: **00872828**

DUNS NUMBER: **21-018-4776**

DPS SUPPLIER REGISTRATION SERVICE ID: **N/A**

APPLICABLE DPS CONTRACT

This Order Form is for the provision of the Deliverables and dated 24th May 2024.
It's issued under the DPS Contract with the reference number **RM6126 CCS
Research & Insights Marketplace DPS** for the provision of **Progress in Reading
Literacy Study (PIRLS) 2026 National Research Coordinator & National Study
Centre for England**.

DPS FILTER CATEGORY(IES):
Primary, Mixed method (qualitative and quantitative)

ORDER INCORPORATED TERMS

The following documents are incorporated into this Order Contract. Where numbers are missing we are not using those schedules. If the documents conflict, the following order of precedence applies:

1. This Order Form including the Order Special Terms and Order Special Schedules.
2. Joint Schedule 1(Definitions and Interpretation) **RM6126 CCS Research & Insights Marketplace DPS**



DPS Joint Schedule
1 - Definitions v1.0.0

3. DPS Special Terms
4. The following Schedules in equal order of precedence:
5. Joint Schedules for **RM6126 CCS Research & Insights Marketplace DPS**
 - [Joint Schedule 1 is covered in '2.' above, and *must* be included]
 - Joint Schedule 2 (Variation Form)



DPS Joint Schedule
2 - Variation Form v.

- Joint Schedule 3 (Insurance Requirements)



DPS Joint Schedule
3 - Insurance Requir

- Joint Schedule 4 (Commercially Sensitive Information)



DPS Joint Schedule 4
- Commercially Sensit

- [Joint Schedule 5 is covered in '6.' Below, and *must* be included]
- [Joint Schedule 6 (Key Subcontractors)]



DPS Joint Schedule
6 - Key Subcontractc

- Joint Schedule 10 (Rectification Plan)



DPS Joint Schedule
10 - Rectification Pla

- Joint Schedule 11 (Processing Data)



DPS Joint Schedule
11 - Processing Data \

- Order Schedules for **DFERPPU 22-23/082**

RM6126 - Research & Insights DPS

Project Version: v1.0

Model Version: v1.3

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- Order Schedule 1 (Transparency Reports)



DPS Order Schedule
1 - Transparency Repor

- Order Schedule 2 (Staff Transfer)



DPS Order Schedule
2 - Staff Transfer v1.1

- Order Schedule 3 (Continuous Improvement)



DPS Order
Schedule 3 - Contini

- [Order Schedule 4 (Order Tender)



DPS Order Schedule
4 - order Tender.pdf

- [Order Schedule 5 (Pricing Details)

]



Attachment 4 Price
Schedule_Pearson_1

- [Order Schedule 7 (Key Supplier Staff)

]



DPS Order Schedule
7 - Key Supplier Staff

- [Order Schedule 8 (Business Continuity and Disaster Recovery)]



DPS Order
Schedule 8 - Busines

- [Order Schedule 9 (Security)

]



DPS Order Schedule
9 - Security v1.1.docx

- [Order Schedule 10 (Exit Management)

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DPS Order Schedule
10 - Exit Management

- [Order Schedule 15 (Order Contract Management)

]

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DPS Order Schedule
15 - Order Contract V

- [Order Schedule 20 (Order Specification)

]



DPS Order Schedule
20 - Order Spec.docx

6. CCS Core Terms (DPS version) v1.0.3



RM6126 DPS Core
Terms v1.0.pdf

7. Joint Schedule 5 (Corporate Social Responsibility)



DPS Joint Schedule
5 - Corporate Social

No other Supplier terms are part of the Order Contract. That includes any terms written on the back of, added to this Order Form, or presented at the time of delivery.

ORDER SPECIAL TERMS

The following Special Terms are incorporated into this Order Contract:

Special Term 1. Safeguarding Children and Vulnerable Adults

Special Term 2. Project outputs

Special Term 3. Departmental Security Standards for Business Services and ICT Contracts



Special Terms -
Research updated Oct

ORDER START DATE: **24th May 2024**

ORDER EXPIRY DATE: **29th December 2028**

ORDER INITIAL PERIOD: **4 years 7 months**

DELIVERABLES

See details in Order Schedule 20 (Order Specification)]

MAXIMUM LIABILITY

The limitation of liability for this Order Contract is stated in Clause 11.2 of the Core Terms.

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The Estimated Year 1 Charges used to calculate liability in the first Contract Year is

██████████

Milestone	Description	Invoice scheduled for	Cost
1	Project set up	Aug-24	██████████
2	Field trial (preparation, school engagement, delivery & data processing)	Jul-25	██████████
3a	Main study (preparation, school engagement, delivery & data processing)	Oct-26	██████████
3b	PBR payment, variable payment	May-27	██████████
4	Draft and Produce final report(s)/outputs, dissemination and further analysis (including National Comparison Study analysis and reporting). NRBA if required.	Dec-27	██████████
4b	School reports, matched data set, teacher symposium	Mar-28	██████████
5	Thematic reports, dissemination and further analysis. 2028 monthly/routine project management (including project close)	Dec-28	██████████
			£1,595,098

ORDER CHARGES

Expenditure for the financial year 2024-25 shall not exceed ██████████ exclusive of VAT.

Expenditure for the financial year 2025-26 shall not exceed ██████████ exclusive of VAT.

Expenditure for the financial year 2026-27 shall not exceed ██████████ exclusive of VAT.

Expenditure for the financial year 2027-28 shall not exceed ██████████ exclusive of VAT.

Expenditure for the financial year 2028-29 shall not exceed ██████████ exclusive of VAT.

Total Project expenditure shall not exceed **£1,595,098** exclusive of VAT

REIMBURSABLE EXPENSES

None

PAYMENT METHOD

Via BACS upon submission of valid invoice

BUYER'S INVOICE ADDRESS:

Department for Education, Sanctuary Buildings, Great Smith Street,
London SW1P 3BT

Invoices must be submitted in pdf format, state the Purchase Order number
(provided separately to this form), and sent via email to

AccountsPayable.OCR@education.gov.uk

BUYER'S AUTHORISED REPRESENTATIVE

[REDACTED]

Head of International Evidence Unit

[REDACTED]

2, St. Pauls Place, Sheffield S1 2FJ

BUYER'S ENVIRONMENTAL POLICY

Department for Education Sustainability and Climate Change Strategy, 21 April
2022, available online at: <https://www.gov.uk/government/publications/sustainability-and-climate-change-strategy>

BUYER'S SECURITY POLICY

Department for Education Personal Information Charter, available online at:
<https://www.gov.uk/government/organisations/department-for-education/about/personal-information-charter#co>

SUPPLIER'S AUTHORISED REPRESENTATIVE

[REDACTED]

PIRLS 2026 National Project Manager

[REDACTED]

80 Strand, London, WC2R 0RL

SUPPLIER'S CONTRACT MANAGER

[REDACTED]

Project Manager

[REDACTED]

80 Strand, London, WC2R 0RL

PROGRESS REPORT FREQUENCY

On the Monday of the third week in the month

PROGRESS MEETING FREQUENCY

On the Thursday of the third week in the month

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KEY STAFF

See 'DPS Order Schedule 7'

KEY SUBCONTRACTOR(S)

Oxford University Centre for Educational Assessment

Department of Education, University of Oxford, 15 Norham Gardens OX2 6PY

E-AUCTIONS

Not applicable

COMMERCIALLY SENSITIVE INFORMATION

See 'DPS Joint Schedule 4'

SERVICE CREDITS

Not applicable

ADDITIONAL INSURANCES

Not applicable

GUARANTEE

Not applicable

SOCIAL VALUE COMMITMENT

The Supplier agrees, in providing the Deliverables and performing its obligations under the Order Contract, that it will comply with the social value commitments in Order Schedule 4 (Order Tender).

For and on behalf of the Supplier:		For and on behalf of the Buyer:	
Signature:		Signature:	
Name:		Name:	
Role:		Role:	
Date:		Date:	

Order Schedule 20 (Order Specification)

Pack for Call-off Competition

Attachment 3 – Statement of Requirements

Title: Progress in Reading Literacy Study (PIRLS) 2026 National Research Coordinator & National Study Centre for England.

Contract Reference: DFERPPU 22-23/082

**FURTHER COMPETITION FROM THE CROWN COMMERCIAL SERVICE
RM6126 RESEARCH & INSIGHTS DYNAMIC PURCHASING SYSTEM
(DPS)**

1. Purpose

Department for Education referred to as ‘the Authority’ hereafter is looking for a supplier to provide a PIRLS National Research Coordinator & National Study Centre to administer PIRLS 2026 in England.

2. Background to the Contracting Authority

England participates in international comparison studies such as PIRLS to benchmark our education policy and performance against other countries, review our system strengths and weaknesses in an international context, and independently monitor trends over time. The information collected is a vital part of the education evidence base that enables us to learn from the policies and practices in other countries. This project is to administer the 2026 cycle of PIRLS in England on behalf of the Department for Education (the Authority).

3. Definitions

Acronym	Definition
PIRLS	Progress in International Reading Literacy Study
IEA	International Association for the Evaluation of Educational Achievement
NRC	National Research Coordinator
CBA	Computer-based assessment
TA	Test administrator
NSC	National Study Centre
NCS	National Comparison Study

4. Summary

The bid opportunity is for a PIRLS National Research Coordinator & National Study Centre to administer PIRLS 2026 in England.

It will involve (but not be limited to):

- administering the PIRLS 2026 computer-based assessment (CBA) in schools in England according to the specification set out by IEA
- administering a full sample paper based national comparison study (NCS) to the same standard as the CBA (at main study)
- recruiting sufficient schools and pupils to take part in the study (including the NCS) so that representative high-quality data is collected for England
- conducting detailed analysis of the international and national dataset and NCS data and preparing and disseminating a national report(s) for England that presents findings in an international and national policy context
- representing England at meetings with the international consortium and other National Study Centres, inputting into decisions affecting the administration of the study

And will require:

- an experienced, well resourced, project team led by an effective project manager
- experience of administering assessments or research programmes similar in size to PIRLS in the education sector
- a record of success in securing high (85%+) school and pupil response rates from a selected sample by engaging and influencing stakeholders
- wide-ranging analytical skills and an ability to produce high quality analysis relevant to the priorities of a range of stakeholders
- knowledge of the education system in England

The project is expected to run from April 2024 to December 2028.

5. Background to the Requirement

PIRLS is an international education study developed by the International Association for the Evaluation of Educational Achievement (IEA). The study first took place in 2001 and has taken place every 5 years since (England delayed testing by a year in the 2021 due to the coronavirus pandemic). PIRLS 2026 will be the 6th cycle of PIRLS, and England has participated in every cycle.

Around 60 countries take part in PIRLS to evaluate their education systems. It provides a unique insight into how well pupils from all over the world can apply knowledge and skills in reading after 4 years of formal primary schooling (Year 5 in England). The data aims to explain differences in pupil performance across and within participating countries through analysis of pupil test scores and contextual information on pupil characteristics and engagement, school management, and national policy.

The 2026 cycle of PIRLS will transition to a fully digital assessment. As England has previously only participated in PIRLS as a paper-based assessment, we will carry

out a full sample NCS alongside the digital assessment to examine any mode effect of this transition.

More background on the IEA and PIRLS, including international reports, can be found at www.iea.nl/studies/iea/pirls

6. The Requirement

Important note

The timeline and exact requirements of the project deliverables are subject to change, with the IEA's requirements and specifications taking precedence. Bidders will need to build flexibility into their proposal to account for this. Bidders should plan to resource their proposal according to the specification in this bid pack but understand that exact deadlines and activities are subject to change, so they must build flexibility into their proposal to deal with current unknowns within the project specification.

Bids should be based on the information provided in this bid pack and the knowledge and professional expertise of the bidder.

6.1. Objectives

Bidders will be required to deliver the following high-level objectives:

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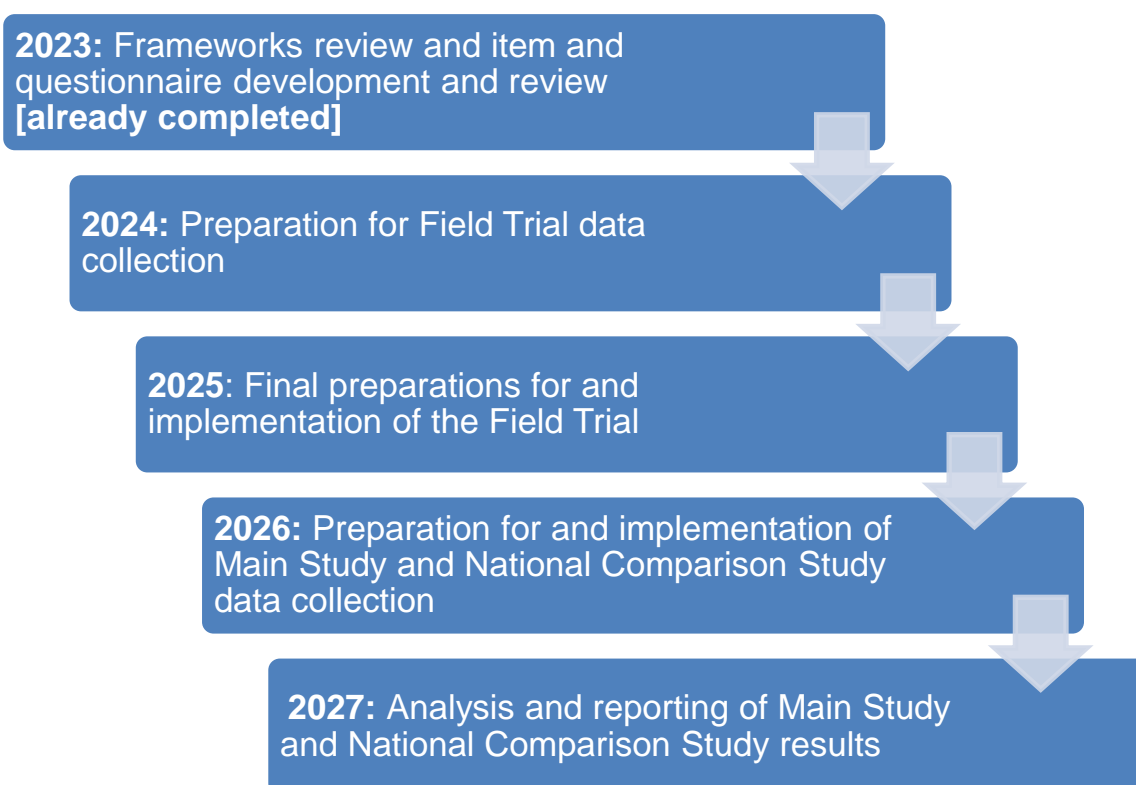
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- provide the role of National Research Coordinator and National Study Centre for England
- administer PIRLS 2026 (field trial and main study) as a computer-based study to schools in England
- administer a full sample paper-based NCS at main study
- adhere to the IEA's international project specification and the PIRLS Technical Standards, including meeting strict operational and response rate requirements
- process the required data so that all results can be reported for England
- undertake sampling, data collection, coding and data cleaning as required for the PIRLS 2026 study and NCS
- ensure that key findings from the PIRLS 2026 main study and NCS are shared and understood within the national context of England, including the publication of a detailed national research report (National Report) outlining the key findings (including from the NCS) for England. All or part of this report(s) will coincide with the publication of international PIRLS 2026 results and the analysis of the results of the NCS must be included in analysis of the results of the CBA published alongside the international PIRLS 2026 results.

6.2. Study design

6.2.1. Timing

PIRLS 2026 will be implemented in a five-year cycle involving instrument development, two data collections (field trial and the main study – which includes for this cycle a NCS), analysis, and dissemination. A high-level indication of the cycle timing is as below:



6.2.2. International standards

Internationally, PIRLS is organised by the International Association for the Evaluation of Educational Achievement (IEA), an independent, international cooperative of national research institutions, government research agencies, scholars and analysts working to evaluate, understand and improve education worldwide.

The IEA has partnered with Boston College and their appointed contractors to form the International Study Centre (ISC) for PIRLS 2026. The responsibilities of the ISC include:

- development of assessment framework and test items.
- drawing school sample (using data provided by NSC).
- collating data (cleaned and marked by NSC) for analysis and production of international reports.
- providing participating countries with data for production of national reports.
- compile and publish the PIRLS encyclopaedia from chapters and instruments completed by the NSC.
- publication of results and dissemination of key findings at the international level.

PIRLS survey requirements are rigorous to ensure data collected from each country can provide a nationally representative picture of pupil performance and school context. The requirements outlined in this bid specification are provided as a guide only. Exact requirements will be made available by the IEA and its contractors to the successful bidder as the study progresses, who will use them to develop an effective study delivery plan.

The successful bidder will be required to adhere to the IEAs methods, procedures and standards which have been developed to ensure the consistency, precision, generalisability and timeliness of the data. Please see [Methods and Procedures: PIRLS 2021 Technical Report | IEA.nl](#) as a guide.

6.2.3. Study components

The PIRLS study consists of a digital assessment, which all participating countries must undertake to the same specification.

- *Pupil assessment:* an 80 minute computer-based test of a nationally representative sample of 9 and 10 year olds. Each pupil is allocated one of a number of digital test booklets each comprising a range of questions based on an equal split of literary and informational passages. It is suggested by the International Study Centre (ISC), (but not required) that the test be broken into two parts with a 15 minute break for pupils mid-way through, and another 15 minute break at the end of the test before completing the pupil background questionnaire.
- *Background questionnaire:* To better understand the contextual (pupil, school and national policy) factors that are associated with pupils' learning, the study includes a number of background questionnaires which collect information about pupils' characteristics and experiences of school, as well as the deployment and preparedness of their teachers and the resources within their schools. These questionnaires (with approximate timings) include:
 - **A pupil background questionnaire (30 minutes)** is completed digitally by each pupil who takes the PIRLS assessment. This questionnaire asks about aspects of: the pupils' home and school lives, including basic demographic information; their home environment; their experiences of school and their attitudes towards reading. Pupils can be given longer to complete the background questionnaire if required.

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- **A teacher questionnaire (45 minutes)** is completed by the teachers of the pupils sampled. The questionnaire gathers information on teacher characteristics as well as the classroom contexts for teaching and learning. The questionnaire asks teachers' about their backgrounds, their views on collaboration, job satisfaction, education and training and professional development.
- **A school questionnaire (30 minutes)** is completed by the headteacher or other member of the school leadership team. It asks for information about the characteristics of the school including; technology, parental involvement, school climate for learning, teaching staff, role of the headteacher and pupils' readiness for school. The questionnaire takes about 30 minutes to complete and is important in understanding the links between pupil achievement and their learning environment.
- **A home questionnaire (25 minutes)** is completed by the parents or guardians of each sampled pupil. The questionnaire asks about home resources for literacy, early educational activities, the child's reading, parents' attitudes to reading, as well as parental education and occupation.

Previous examples of the assessments and questionnaires can be found at: [PIRLS 2021 - PIRLS 2021](#)

6.2.4. Questionnaire delivery

The home questionnaire will be available online or as a paper-based questionnaire in 2026. IEA will decide in spring 2024 whether the headteacher and teacher questionnaires, will be available as a paper-based option or only online.

- Online questionnaires are developed and hosted by the ISC and the NSC is responsible for providing participants with access details, instructions as may be required, and support in accessing the questionnaires.
- Paper questionnaires are provided to the NSC in electronic format and the NSC is responsible for printing, distribution, collection and for data entry.

Bidders should outline an approach to the administration of background questionnaires that optimises response rates. The Authority will decide whether to administer the home questionnaire following selection of a preferred supplier and will take this decision based on a number of factors, including the appointed supplier's evidence of success of achieving high response rates in comparable studies. Bidders should therefore include the cost of the home questionnaire in their pricing, but present it as a separate, removable option.

Bidders should also ensure that their questionnaire pricing is flexible enough to accommodate delivery of school, teacher and/or home questionnaires online, on paper, or a combination of both if

required.

If required by the Authority, the successful bidder will be responsible for proposing and agreeing up to 5 specific national options questions to be appended to the pupil, teacher and/or school questionnaires in England to address priority evidence gaps.

6.2.5. National Comparison Study

PIRLS 2026 will transition to a fully digital study and IEA will support countries who wish to administer their own paper-based NCS to examine mode effect. The NCS data will not be used at an international level for comparison, purely at a country level.

As England will be participating in the CBA for the first time, we will carry out a NCS at the main study. Countries can choose their NCS sample size. In England the NCS will involve administering a paper-based version of the PIRLS assessment, based on trend items, supplied by the ISC alongside the 2026 digital study, in 170 schools. In addition to the administration of the NCS, bidders will also be required to analyse and report the NCS results.

6.2.6. Longitudinal Study

In PIRLS 2026, the IEA are offering a new longitudinal option that assesses the same pupils 12 months after PIRLS 2026 (Year 6 in England) with the aim of gathering information on learning gains in one year and information on background variables related to different learning gains. England has decided not to participate in this option.

6.3. Method of delivery

6.3.1. International comparability

To be able to reliably assess how the performance in a country compares to another, and how country performance has evolved from one PIRLS cycle to the next, each assessment is linked to those that preceded it through the use of trend items.. It is essential to adhere to IEA requirements and specifications in the preparation of materials and study implementation as any variations in the study implementation

are likely to affect test performance e.g., session timing; the administration of test materials and support material; the instructions given prior to testing; and the rules for excluding pupils from the assessment.

6.3.2. Field trial

Before the study is administered in full, countries test the logistics of their assessment procedures through a field trial with a smaller sample of schools and pupils. This involves sampling and school and pupil recruitment, preparation of school materials, translation, adaptation, verification, testing of the CBA system, and administration of the study in schools. This process also gives the international consortium the opportunity to assess the performance of the test items so that only suitable ones are included in the main study.

Following the field trial, a detailed conduct report is prepared by the NSC setting out lessons learned and recommending any refinements to the processes for the main study e.g., to reduce burden on schools or deliver the study more effectively, including any cost savings

6.3.3. Computer-based assessment (CBA)

PIRLS is delivered as a computer-based assessment. The 2026 cycle will be fully digital via an online assessment. The CBA can also be delivered offline. High level information on the technical specifications can be found in the documents in Annex A and the IEA will provide more detail on the specification in due course. Pupils will not need microphones, speakers or headsets to take the assessment.

The National Study Centre must provide a help desk or IT support personnel to assist school coordinators and test administrators (if needed) while preparing for and during the test administration.

In their proposal, bidders should clearly demonstrate capability to develop and implement effective solutions to deliver technology dependent projects in schools and set out in their proposal how their approach to delivery and resourcing will reduce and minimise the burden on schools, including how they will support schools who do not have the facilities or equipment to support participation in the survey. The use of USBs is to be avoided where possible, with alternative solutions being preferred.

All bids must also clearly demonstrate how PIRLS materials, schools IT infrastructure, pupils and study data will be protected at each phase of the computer-based administration.

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Any planned purchase of hardware e.g. laptops should be clearly set out in your proposal. Hardware costs should be clearly presented as a separate amount in your pricing plan. Pricing should not assume the use of any DfE assets.

Test administration

The PIRLS assessment is administered in participating schools by test administrators (TAs) who ensure that the data are collected consistently, and in a comparable fashion, for all participants. Successful bidders will be responsible for recruiting and training sufficient suitably experienced and qualified test administrators to administer the study to the agreed sample of field trial and main study (including the NCS) in England. A sufficient geographical spread of TAs will be required to minimise travel and provide maximum flexibility to schools on testing times and dates within the study window.

It is possible for schools to administer the PIRLS study themselves either with the support of a TA or alone. If your proposal will include this option, please explain the rationale in your proposal, how you will ensure this is delivered to a high standard, and the scope (CBA/NCS or both).

6.4. PIRLS 2026 sample

The NSC agrees stratification variables with the Authority and international contractors and provides the sampling frame to the international contractors, which then draw the school sample. The NSC then collects information about eligible pupils from sampled schools and uses this to select a random sample of pupils of the right age range to participate in PIRLS – typically Year 5 pupils.

Only sampled schools and pupils may be invited to participate in the survey. Non-participating schools may only be replaced by those from a first or second replacement sample, which is drawn by the international contractors at the same time as the main sample. Non-participating pupils cannot be replaced.

The required sample size for 2026 has not been determined by the IEA at this time, so bidders should base costs on the indicative figures in the table below:

Sample	No. for CBA	No. for NCS
Field trial pupil sample	1,200	n/a
Main study pupil sample		5,100

Sample	No. for CBA	No. for NCS
Field trial pupil sample	1,200	n/a

6.5. Working with schools

6.5.1. School tasks

In addition to pupils completing the assessment and pupil questionnaire, schools must nominate a member of staff to liaise with the National Study Centre and coordinate the school's participation in PIRLS (the School Coordinator). The international consortium will provide a manual for distribution to the school coordinators outlining their role in more detail but, as a guide, schools (and school coordinators) will be required to:

- encourage participation by working with staff, pupils, and parents to positively promote PIRLS in their schools
- work with the National Study Centre to identify date(s) in 2025 (field trial) and 2026 (main study) for the assessment to take place in their school
- provide eligible pupil data from which a pupil sample will be drawn by the National Study Centre
- provide accommodation and sufficient facilities, including computer workstations (if available), for the assessment to take place in as few sessions as possible (including, if necessary, return visits until sample requirements are met)
- work with the National Study Centre to verify readiness of facilities for assessment day(s)
- ask a member of the senior leadership team to complete the school questionnaire and class teacher to complete the teacher questionnaire

The School Coordinator role is voluntary, and it is very important that the National Study Centre minimises all School Coordinator tasks where possible.

6.5.2. Required response rates

To minimize the potential for non-response bias, PIRLS aims for 100% participation by sampled schools, classrooms, and pupils, while recognizing that some degree of non-participation may be unavoidable.

For a main study national sample to be fully acceptable it must have either:

- A minimum school participation rate of 85%, based on originally sampled schools AND
- A minimum classroom participation rate of 95%, from originally sampled schools and replacement schools AND

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- A minimum pupil participation rate of 85%, from sampled schools and replacement schools

OR

- A minimum combined school, classroom, and pupil participation rate of 75%, based on originally sampled schools (although classroom and pupil participation rates may include replacement schools)

Classrooms with less than 50% pupil participation are deemed to be not participating.

It is the responsibility of the NSC to ensure that the required proportions of sampled schools and pupils complete the assessments and background questionnaires, and that participation rates for the school and teacher questionnaire are as high as possible (with responses ideally representing at least 85% of participating pupils). Should the IEA or the Authority not be satisfied that response rates have been met at either school or pupil level, then the NSC will be required to conduct a non-response bias analysis of the data. These response rate requirements will also apply to the NCS.

At field trial, response rates are slightly more flexible, but bidders should plan to achieve 100% participation to fully test their proposed recruitment and delivery plan ahead of the main study.

6.5.3. Securing high response rates

The success of the project rests on securing the required response rates for both schools and pupils. Without this, the data could be compromised or deemed invalid by the IEA.

Participation in PIRLS is not mandatory for schools or pupils and recruiting schools to take part in international studies can be challenging, as the studies do require time from schools and pupils. Previous rounds of PIRLS have achieved very high participation rates, but these rounds have been delivered as a paper-based study which is easier for schools to administer. It is essential that these are maintained for PIRLS 2026 for both the CBA and the NCS. The successful bidder will therefore need a credible and well-resourced plan to encourage sampled schools to agree to participate in the study.

In England, section 20 of the Education Act 2011 grants the Secretary of State the power to direct the governing body of a maintained school, or the trust of an academy which has opened since September 2011, to secure that the school participate in an international education study. The statutory power is an indicator of the importance of international studies to the education evidence-base. When recruiting for international surveys we have always avoided the need to use the legislation, we have preferred instead to encourage participation. In preparing survey implementation plans the successful contractor must not depend on the willingness of the Secretary of State to enact this power for any one or more school.

The Authority relies on the goodwill of schools that agree to take part in the study to ensure that the strict participation rates are met and are committed to reducing the burden of research on schools. The successful bidder will be expected to ensure that participation in PIRLS is a positive and

rewarding experience for all schools and pupils. In section 3 of their proposal, bidders should present an evidenced recruitment strategy setting out how their approach will optimise the rates of school and pupil participation.

In addition to information specified in the Technical Evaluation Criteria in attachment 2 (Instructions to Bidders), this should also include:

- how they will work in partnership with education stakeholders and colleagues to encourage school recruitment
- the rationale behind any proposed incentives (see additional proposal requirements in 6.11 below)
- a description of the invitation materials that will be sent to schools
- identification of the barriers to school recruitment and how they plan to mitigate or remove these
- examples of how they will reduce the burden on schools and School Coordinators

6.6. Coding

Some pupil and questionnaire responses are automatically marked or ‘coded’ but constructed responses will need to be coded by the NSC. The IEA’s ‘National Costs’ document in Annex A gives further estimates of the scope of scoring. However, items are still being developed for the 2026 cycle and, as such, the exact requirements for coding are still to be confirmed. As a guide, bidders should base their costs on these estimates and their previous knowledge and experience, allowing some flexibility should these rates differ. **Bidders should ensure that their plans are scaled to include coding of the NCS data.**

6.7. Analysis, reporting and dissemination

6.7.1. Dataset

The data collected through the study will be collated by the IEA's international consortium and combined with the data collected from all other participating countries and economies.

The IEA will analyse the data collected internationally as part of the PIRLS 2026 study and draw out key findings across all participating countries. They will publish the results of PIRLS 2026 in 2027 (likely in December), before which the findings will remain under embargo. At present, they do not intend to analyse and report on the NCS data – this will be returned to countries for analysis.

The responsibilities of successful bidders for the PIRLS 2026 data (including NCS) will include:

- ensuring the international consortium receives data in the correct format and within the required timelines
- maintaining the national datasets for England, and ensuring opportunities are taken to enhance the datasets through matching to other datasets where relevant
- storage of the dataset(s) whilst they hold the PIRLS 2026 contract
- checking and resolving any queries relating to the data collected from the international consortium.

6.7.2. Analysis and dissemination of results

The findings from the PIRLS 2026 main study and the supporting NCS will provide the Authority with important data to benchmark themselves against other participating countries. The National Study Centre will be required to work with the Authority to identify what these results can tell us and what additional analysis could be undertaken to address priority research questions.

Analysis and dissemination of the results must engage different users, including, but not limited to, Ministers, policymakers, academics and researchers, headteachers, teachers and pupils, and should include (but not be limited to):

- the development and publication of a national report for England, positioning the results in an international context and addressing other key research questions of interest to policy makers and stakeholders, to include results from PIRLS 2026 matched to pupil characteristics from the National Pupil Database and respective School Censuses; the report must be published on the same day as the international results.
- full analysis and reporting of the NCS, enabling understanding of the mode effect, also to be published on the same day as the national and international results.
- accessible summaries of the key findings for England for all stakeholders seeking an introduction to the results, including the media, parents and the public, published on the same day as the international results.
- a suite of supplementary thematic analysis, with topics to be agreed based on the results, and the publication of accessible research reports on the findings.

- insightful information for participating schools to engage them with their own results and the national and international results. This may be in a written or other format.

The topics and methodology for the thematic analyses will be agreed with the Authority, based on proposals from the National Research Centre and topics of interest to policymakers at the time of the results. As an indication, bidders should cost bids on the basis of a minimum of three pieces of thematic analysis, including descriptive analysis and multilevel modelling, and the publication of three accessible research reports of 20-30 pages.

For a guide to the level of detailed analysis required, please see the recent national reports and additional thematic analysis for England which can be found at

<https://www.gov.uk/government/collections/international-comparisons-of-education>

6.8. Project management and governance (including risks and KPIs)

6.8.1. Project management

PIRLS is a study involving many workstreams, tight and flexible timescales and varying levels of activity during the 5-year project cycle. PIRLS 2026 will be particularly complex due to the requirement to run the computer-based main study and paper-based study NCS in parallel.

Whilst the Project Board provides input to the project at key stages, sufficient designated and suitably experienced project manager resource is essential to take ownership of the project and ensure that it runs smoothly (see also TEC 1 in attachment 2). The project manager will be responsible for proactively ensuring that the project runs to schedule thereby minimising the burden of monitoring delivery on the Authority. They will also be responsible, along with the NRC, for ensuring that high-quality outputs are delivered in line with requirements.

In their proposals, bidders must clearly set out the level of project management resource that will be in place and, in the case of consortia, how project management responsibilities will be organised within the consortium.

6.8.2. Risk Management

You should include in section 3e of your proposal a summary of what you believe will be the key risks to delivering the project and what contingencies you will put in place to deal with them.

A risk is any factor that may delay, disrupt, or prevent the full achievement of a project objective. All risks should be identified. For each risk, the one-page summary should assess its likelihood (high, medium, or low) and specify its possible impact on the project objectives (again rated high, medium, or low). The assessment should also identify appropriate actions that would reduce or eliminate each risk or its impact.

Typical areas of risk for a research project might include staffing, resource constraints, technical constraints, data access, timing, management, and operational issues, but this is not an exhaustive list.

6.8.3. Key performance indicators

In proposing their approach to delivery of the study, bidders must demonstrate understanding of the key objectives and deliverables detailed in this specification and supporting annexes. **To show how they will be accountable for the success of the study, bidders should include in section 3e of their proposal a table setting out at a high-level what they consider to be the top (no more than 8) key performance indicators (KPIs) for the project.**

6.9. Timings

Indicative project timings are set out below and also in Annex A & B. These dates may change.

DATE	ACTIVITY
07 12 2023	Launch of Procurement via Jaggaer e-Tendering Portal
20 12 2023 12 noon	Clarification period closes (" Bid Clarification Deadline ")
06 02 2024 23:59	Deadline for submission of Bid (" Bid Submission Deadline ")
06 03 2024	Proposed Award Notification Date

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16 04 2024	Expected commencement date for Contract
April 2024	Project Set Up Meeting
Spring 2025	Field Trial
Spring/summer 2026	Main Study
December 2027	National and International reports published
2028	Dissemination and additional analysis
December 2028	Project close

6.10. Budget

The budget for this project, including expenses and any respondent incentive payments is **£1,900,000 (excluding VAT)**. A detailed breakdown of costs is required within **Attachment 4 Price Schedule** as per the instructions set out in **Attachment 2 Instructions to Bidders**.

Bidders should plan to resource their proposal according to the specification in this ITT and the proposed approach but understand that exact deadlines and activities are subject to change, so they should also include flexibility to deal with current unknowns within the project specification.

6.11. Format of proposal

Your written proposal should clearly demonstrate how you will deliver the requirements, including whether the services will be delivered solely by your 'in-house' capability or whether you intend to Sub-Contract any element(s) of the Services delivering the proposal. Details of sub-contractors should also be provided as part of your response to Qualification Criteria 4 – further Information within **Attachment 2 Instructions to Bidders**.

Your proposal should contain the sections below and be in the following format:

DPS Schedule 6 (Order Form Template and Order Schedules)

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- **Format:** Microsoft Word or PDF
- **Font:** Min. font size 11pt
- **Page Limit:** 40 A4 Pages. Where applicable, section word and/or page limits are specified

Section number	Title	Word/page limit
1	Table of Contents	n/a
2	Summary of Proposal	2 A4 pages
3	<p>Meeting the Specification:</p> <p>(Please use the following sub-headings)</p> <ul style="list-style-type: none"> a) Understanding of aims of PIRLS 2026 b) Proposed delivery approach (methodology) including technical solution and data security c) Plan for achieving required school and pupil response rates d) Outline plan for analysis, reporting and dissemination e) Governance and project management, including proposed KPIs and risk management f) Improving health and wellbeing (Social Value Criteria) 	<p>a) 1,500 words</p> <p>b) 5,000 words</p> <p>c) 2,500 words</p> <p>d) 3,000 words</p> <p>e) 2,000 words</p> <p>f) 500 words</p>
4	Timetable of activities	3 A4 pages
5	<p>Organisational structure and staffing</p> <ul style="list-style-type: none"> • Structure of team and relevant skills and experience of core project staff. Summarise key responsibilities, outputs and achievements for 3 relevant projects in the last 5 years (for each partner in the bid if applying as a consortium) • (if applicable) Consortium structure and organisation of roles and responsibilities 	Not included in word count & page limit, but staff CVs to be limited to maximum 500 words for each staff member

DPS Schedule 6 (Order Form Template and Order Schedules)

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	<ul style="list-style-type: none">List of minor subcontractors e.g. printing companies	
6	Cost and charging arrangements Please complete separate excel spreadsheet (4. Price Schedule)	n/a

Additional Proposal Requirements – Dependencies

You should indicate in Section 5 of your proposal if you are reliant on any third party for the access of information, data or undertaking any of the work. This should be considered in addition to your requirement to outline formal sub-contracting arrangements within your response.

Additional Proposal Requirements – Monitoring Techniques

You should indicate in Section 3 of your proposal how you will monitor the project to ensure it is delivered in terms of quality, timeliness, and cost.

Additional Proposal Requirements – The Use of Incentives

If you are proposing the use of respondent incentives, you must set out in Section 3c of your proposal:

- why you feel they are necessary
- why it is not possible to achieve the required sample sizes or response rates without the use of incentives
- how and to what extent they will raise the overall response rate
- how you will mitigate any specific biases that could be introduced,

You must provide a cost comparison with non-incentive methods and your arguments should be supported by empirical evidence from past use.

The exceptions to this are payment for participation in group discussions or in-depth qualitative interviews, payment to cover respondent expenses e.g., travel and childcare costs, and compensation for excessive demand on respondents, e.g., taking basic skills tests, diary keeping, panel maintenance and compensating schools for the respondent's time.

If you wish to use a prize draw incentive then you must also set out in your proposal how you will comply with all relevant legislation and codes of practice (e.g. the British Code of Advertising and Sales Promotion), state that you shall be solely liable for any breach of these and that you shall indemnify the Authority against any claims that may be made under them.

7. Key Milestones and Deliverables

Please see Annex B for an overview of the main activities, milestones and outputs for the project. Please note that the timeline and exact requirements for project deliverables are subject to change; the PIRLS technical standards and IEA requirements and specifications take precedence over those in this bid specification.

8. Continuous Improvement

- 8.1. The successful supplier shall maintain open channels of communication with the Authority to resolve issues, share lessons learned and present new ways of working during project review meetings. Any proposed new ways of delivering the Services shall be brought to the Authority's attention and formally agreed prior to any changes being implemented.

9. Social Value and Sustainability

- 9.1. The social value criteria for this project is: to improve health and wellbeing. Bidders will need to demonstrate (in Section 3f of their proposal) how they will:
 - support the health and wellbeing, including physical and mental health, in the contract workforce (e.g. sufficient resourcing, initiatives, monitoring and support).
 - influence staff, suppliers, customers and communities through the delivery of the contract to support health and wellbeing, including physical and mental health (e.g. health and wellbeing initiatives for schools and/or pupils, supporting schools by introducing strategies to reduce the burden of taking part in the study).

10. Price

- 10.1. Prices are to be submitted within **Attachment 4 Price Schedule** as per the instructions set out in **Attachment 2 Instructions to Bidders** excluding VAT and including all other expenses relating to Contract delivery.
- 10.2. Bidders must include a table in **Attachment 4** to clearly show how their proposed pricing model incentivises them to succeed in school recruitment e.g. by including payments for delivery that reflect participation rates achieved.

11. Staff and Customer Service

- 11.1. The Supplier shall provide a sufficient level of resource throughout the duration of the Contract to consistently deliver a quality service.
- 11.2. The Supplier's staff assigned to the Contract shall have the relevant qualifications and experience to deliver the Contract to the required standard.
- 11.3. The Supplier shall ensure that staff understand the Authority's vision and objectives and will provide excellent customer service to the Authority throughout the duration of the Contract.
- 11.4. The Supplier shall communicate all changes to the Key Personnel as defined in the Call-Off Contract throughout the Term.

12. Security and Confidentiality Requirements

Departmental Security Standards for Business Services and ICT Contracts

- 12.1. The Authority's security standards clauses are included as the Buyer's Security Policy within **Attachment 6a Order Contract Terms & Attachment 6b Order Form**.

Supplier Security Assurance Questionnaire

- 12.2. Suppliers and any sub-contractors are required to complete **Attachment 5 Supplier Security Questionnaire** as part of their bid, for the Authority to obtain a level of assurance with regards to our assets throughout the life of the contract.

Data Collection

- 12.3. Suppliers will be expected to clear any data collection tools with the Authority before engaging in field work. Suppliers should include Data Privacy Notices for research participants via respondent documentation and/or interviewer briefing notes, and clearly state what the data is being collected for and on

behalf of the Authority and that no reference is made, implied or otherwise, to the data being used solely by or available only to the supplier. Suppliers should establish with the Authority the legal basis for data processing under the General Data Protection Regulation and the Data Protection Act 2018.

- 12.4. The respondent documentation and/or interviewer shall ensure that the respondent clearly understands (before they give their consent to be interviewed) the purpose of the interview, that the information they provide will only be used for research purposes and, in the case of interviews (telephone or face-to-face), that they have the right to withdraw from the interview at any time. Where consent is used as the legal basis for data processing, consent procedures should ensure compliance with the General Data Protection Regulation and the Data Protection Act 2018.

Burden

- 12.5. The Authority seeks to minimise the burdens on schools and Local Authorities (LAs) taking part in surveys. It is therefore important that bids should set out how the proposed methodology will minimise the burden on schools and/or LAs and a justification for the proposed sample size.
- 12.6. When assessing the relative merits of data collection methods, the following issues should be considered:
- only data essential to the project shall be collected;
 - data should be collected electronically where appropriate and where schools and/or LAs prefer this;
 - questionnaires should be pre-populated wherever possible and appropriate;
 - schools must be given at least four working weeks to respond to the exercise from the date they receive the request; and
 - LAs should receive at least two weeks, unless they need to approach schools in which case, they too should receive 4 weeks to respond.
- 12.7. The Contractor shall clear any data collection tools with the Authority before engaging in field work.
- 12.8. Researchers shall check with the Authority whether any of the information that they are requesting from schools can be provided centrally from information already held.

Consent Arrangements

- 12.9. The Authority and the supplier shall agree in advance of any survey activity taking place the consent arrangements that shall apply for each of the participant groups. All participants should be informed of the purpose of the research, that the supplier is acting on behalf of the Authority and that they have the option to refuse to participate (opt out). Where opt-in consent is used, the approach should be compliant with the General Data Protection Regulation and Data Protection Act 2018. Contact details should be provided including a contact person at the Authority. Children who are 16 or over will usually be able to give their own consent but even where this is so, the Contractor, in consultation with the Authority, should consider whether it is also appropriate for parents, guardians or other appropriate gatekeepers (e.g., schools, Local Authorities) to be informed when a child has been invited to participate in research.

13. PAYMENT AND INVOICING

- 13.1. Details of payment and invoicing requirements are included within **Attachment 6a Order Contract Terms** and **Attachment 6b Order Form**.

14. Annex A – IEA specification (separate documents)

These IEA documents are provided as an indication of requirements only and are subject to change.

- a. PIRLS 2026 Brochure
- b. PIRLS 2026 Draft Schedule
- c. PIRLS 2026 National Costs
- d. PIRLS 2026 Job Description

15. Annex B (separate document) PIRLS 2026 deliverables