

Schedule 3 – Form of Call-Off Contract

Modified Test Framework Agreement – STA-0299
Call-Off Contract No: STA-0299-01-02
Title: Modified Tests Framework 2023-2026 Call-Off 01 Work Package 2 - KS2 live tests in 2023; Helpline; and past papers service for KS1 and KS2
Supplier: VI Resourcing Ltd (trading as Connect)

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

Service Commencement Date:	22 June 2023
Call-Off Contract End Date:	31 July 2024
Call-Off Contract Value:	£134,700
Relationship Manager for Department for Education:	██████████
Contract Manager for the Department for Education:	██████████
Relationship Manager for the Supplier:	██████████
Contract Manager for the Supplier:	██████████

1. Background

STA requires services for development and delivery of modified versions of National Curriculum Tests for the period June 2023– July 2024. This contract is for Work Package 2 of the Modified Tests Framework 2023-2026 Call-off 01. Work Package 2 will include:

- Development of KS2 live tests for use in 2024
- Development of draft proofs for all KS2 TPT items:
 - GPS (approx. 210 items)
 - Maths (approx. 203 items) and (approx. 55 reasoning items for Live 2024)
 - Reading (approx. 160 items and 6 texts)
- Review of KS2 Item Validation Trial materials
 - GPS - N/A
 - Maths - N/A

- Reading (approx. 270 items and 7 texts)
- Review of proposed KS2 English reading texts (approx. 35 texts)
- Provision of a helpline and past papers service and validation of orders for KS1 and KS2

2. Functional Requirements

This section outlines the specific functional requirements for the delivery of this Work Package. 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 Framework.

General functional requirements	
Data	STA will provide access to a secure portal for the transfer of data from the Supplier to STA.
Contract variations and change control management	<p>STA requires a change request for all 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>
Documentation format	<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">• STA187970MLp_KS2_EGPS_P1_V1• STA187970BTp_KS2_EGPS_P1_V1

	The Supplier should include a front cover confirming the version number and stage (e.g., Meeting 1 discussion proof.)
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Specific Functional requirements

Deliverable	No.	Functional requirements
PM - Project Management – Tenderers must also refer to the Modified Framework (PM.1 – PM9)		
Project Initiation Document (PID)	PM.2	<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 each 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.</p> <p>The PID must include, but not be limited to:</p> <ul style="list-style-type: none"> • risk management process / risk register • an issue log • a change control register • communication plan • quality plan and log • product descriptions (as appropriate) • exception reports • lessons learned log

		<ul style="list-style-type: none"> • equality plan and social value management
Project Plan	PM.3	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.
Process Management	PM.4	<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>
Project Closure report	PM.6 and MP.10	<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>

Meetings	PM.9	<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"> • Weekly checkpoint meetings • Lessons learnt meeting • Senior Supplier meetings • Meeting with STAs modified print supplier to identify and manage dependencies.
MI - Management Information		
Management Information	MI.1	<p>The Supplier must submit to STA Management Information (MI) and performance reports based on, but not limited to:</p> <ul style="list-style-type: none"> • Checkpoint reports • Incoming and outgoing calls. • Emails received. • Receipt and validation of test orders • Past papers requested • General enquiries and complaints <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>
S – Security		

Security Plan	S.1	<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 https://www.gov.uk/government/collections/government-security/). 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>
Data policy		<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"> • all computers are password-protected • all computers lock automatically after five minutes of inactivity

	S.8	<ul style="list-style-type: none"> • STA Data is not stored or transported on removable media devices (CD writer, DVD writer, memory sticks and similar • Data files are stored on network drives and not the local hard disk; and all portable media is encrypted
Data policy	S.9	The handover of any material must be via the STA portal. If, for any reason, the portal fails, handover materials will need to be sent via Galaxkey.
E – Equalities		
Equality Plan	E.5	The Supplier must produce an equality plan for each 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.
BC - Business Continuity		
Business continuity plan	BC.2	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.
PQR - Performance and Quality		
Performance targets	PQR.1	The Supplier must conform to performance targets in relation to quality, efficiency and adherence to the timetable as laid out in each 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.

Proofing process and quality assurance arrangements	PQR.6	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.
ET - Exit and transition		
Routine exit and transition	ET.1	The Supplier must provide and maintain a detailed, fully resourced and costed routine 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
Emergency exit and transition	ET.2	The Supplier must provide and maintain a detailed, fully resourced and costed emergency 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
Statement for support required	ET.3	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.
List of all assets for delivery	ET.4	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.

Identified assets to be transferred to DfE	ET.5	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.
EX – Expertise		
Specialist modifiers	EX.1	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.
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.		
Start-up meeting	MP.1	Start-up meeting <ul style="list-style-type: none"> • 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. • The Supplier must develop product descriptions to manage the work to be delivered in the call-off.

English Reading text review (if required)	MP.2	<p>English Reading text review</p> <p>STA will provide the Supplier with a number of texts to complete an assessment on them. The Supplier must provide a written report to STA with the outcome of their assessment, providing information on all texts and stating whether they:</p> <ul style="list-style-type: none"> • require no modification. • require modification and to what extent. • are unsuitable for modification or are unsuitable topics for children with special educational needs (SEN), visual impairment (VI) or hearing impairment (HI)
Item Validation Trial Report	MP.2	<p>Item Validation Trial Report</p> <p>The Supplier will receive copies of all items to be included in the Item Validation Trial (IVT) and must complete an initial assessment of them. The Supplier must provide a written report to STA with the outcome of their assessment. This report must provide information on all items and state whether they:</p> <ul style="list-style-type: none"> • require no modification • require modification and to what extent • are unsuitable for modification or • are unsuitable topics for children with special educational needs (SEN), visual impairment (VI) or hearing impairment (HI)

Technical Pre-test review	MP.3	<p>Technical Pre-test review and report</p> <p>In advance of meeting 1, STA will provide the Supplier with copies of all items that are included in the technical pre-test (TPT) electronically via the portal. The Supplier must undertake an initial review of the materials to indicate potential modifications required for the different modified versions of the test. (Including where models may be required) The Supplier must use the item bank template provided by STA. (See Document 6)</p> <p>Modification meeting 1.</p> <p>The Supplier must attend Meeting 1 with STA staff to recommend, 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>
Draft proofs of TPT items	MP.4	<p>Draft proofs -TPT items</p> <p>Following 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 (electronically via the portal) for storage in the STA item bank. (See MP.10)</p>

Meeting with HI specialist(s)	MP.7	<p>HI Meeting</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>
Discussion proof	MP.5	<p>Before modification meeting 2 (Discussion proof)</p> <p>Once the Standard live test has been constructed, STA will provide the Supplier with the construction information.</p> <p>The Supplier must construct modified discussion test booklets.</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> <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"> • Discussion MLP test booklets • Discussion Tactile Braille • Discussion braille transcript booklets (including diagram sketches/specifications) • Discussion MTAs • Discussion mark schemes with proposed amendments (MSA). • Discussion model specifications (see Model Spec Templates in Document 6)

		<p>At this stage we will require 3 hard copies of each document and 1 hard copy of Tactile Braille which may need to be delivered via a courier to various locations at different times.). A cover sheet should be included to clearly identify these are Discussion proofs for Meeting 2.</p>
<p>Modified meeting 2</p>	<p>MP.6</p>	<p>Modification meeting 2.</p> <p>The Supplier, including project staff and modifiers, must attend Meeting 2 with STA. The purpose of the meeting is to discuss all materials and agree final modifications.</p> <p>The Supplier must maintain a complete record of decisions agreed at the meeting (updating the item bank template provided) on the following:</p> <ul style="list-style-type: none"> • Discussion MLP test booklets • Discussion Tactile Braille • Discussion braille transcript booklets (including diagram sketches/specifications) • Discussion MTAls • Discussion mark schemes with proposed amendments (MSA). • Discussion model specifications (see Model Spec Templates in Document 6) <p>The agreed decisions will then be signed off by STA.</p>

<p>First proof of all materials</p>	<p>MP.8</p>	<p>First proof (All materials)</p> <p>The Supplier must produce first proof of all materials based on the agreed record of decisions from 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"> • a parallel read against the standard tests to ensure changes that have taken place in the standard test have been included • a review of modified documents to ensure that a consistent approach has been taken <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 hardcopies of discussion proof materials (excluding electronic copies of Tactile Braille). A cover sheet should be included to clearly identify these are First proofs.</p> <p>At this stage, the Supplier must provide 6 hard copies of each document and 1 hard copy of Tactile Braille (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. The Supplier must make any amendments to the first proof accurately reflecting STA's mark-up.</p>
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<p>Sign off proof</p>	<p>Sign-off Proof – All materials.</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. The Supplier must provide estimated paginations if requested during previous proofing stages.</p> <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)</p> <p>At this stage, the Supplier must provide 4 hard copies of each document and 1 hard copy of Tactile Braille which may need to be delivered via a courier to various locations at different times.</p> <p>STA Head of Test Development Research (HoTDR) sign off.</p>
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	MP.9	<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"> • MLP test booklets - web and print ready PDF files • Braille test booklets in dxb and brf format • Braille transcripts - web and print ready PDF files • Separate cover sheets for the braille tactile in pdf, dxb and brf format • MTAls - web and print ready PDF files • MSAs - web ready files PDF files <p>Handover of materials and the format types will be confirmed at the start-up meeting.</p> <p>Post HoTDR sign-off.</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>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>
Project close down report	MP.10	<p>Project close down 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 provide all draft proofs of TPT items (electronically via the portal) for storage in the STA item bank.</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)
GM - Guidance Materials – for administration and marking of modified tests Refer to Document 6 for a typical list of all documents.		
Guidance materials	GM.1	<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"> • MTAls - general and test-specific guidance on how to administer the modified tests to pupils with visual impairment. • Guidance for pupils with a hearing impairment (pupils who use sign language or oralist support) to be provided for inclusion in the TAI/TAG. • If models are required, guidance on how the test administrator should introduce these to pupils must be provided. • For reception baseline assessment the Supplier must review the items and produce guidance to support their administration.
Mark Scheme amendments	GM.2	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.
BP - Braille Papers		

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.

To note: At present there are no plans for a braille version of the reception baseline assessment, but this will be confirmed at a later date.

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.

All Braille should be in Unified English Braille (UEB) and must meet the following minimum criteria:

Key stage 2 Tests:

- KS2 braille papers ('Braille A4': 275 x 297mm), bound with treasury tags.
- Contracted (Grade 2) Braille (UEB)
- Uncontracted (Grade 1) Braille (UEB) (KS2 English reading only)

Diagrams:

Braille versions of all tests	BP.1	<ul style="list-style-type: none"> • Diagrams can be integrated within the text, preferably appearing on the facing page to the relevant question. • Diagrams / sheets needing pupils to draw upon should be attached loosely at the back of the test booklet
Identify specific diagram or tactile images	BP.2	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).
Braille transcripts	BP.3	The Supplier must provide a transcript of all braille test booklets for all tests, and of all braille supporting materials.

MOD -3D Models

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.

Model specification	MOD.1	<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>
Guidance on model use	MOD.2	<p>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)</p>
<p>MLP - Modified Large Print</p> <p>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.</p> <p>At present there are no plans for a modified large print of the reception baseline assessment, but this will be confirmed at a later date.</p>		
		<p>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).</p> <p>STA will provide test booklet templates.</p>

MLP version of test booklets	MLP.1	<p>The MLP versions must currently meet the following minimum criteria:</p> <p>KS2 English reading; English grammar, punctuation and spelling, and mathematics</p> <ul style="list-style-type: none"> ▪ Japanese B4, wire-o bound/saddle stitched booklets ▪ Text size: 18pt (& 24pt for words that are 'bold') ▪ Font: Arial Bold <p>Please note - STA is conducting research into producing an A4 booklet using 24pt font for KS2 MLP papers. STA will clearly indicate if the requirement for MLP font and paper size should change.</p> <p>(Suppliers must cost for Japanese B4, 18 pt MLP but also include alternative pricing in the costing spreadsheet as directed)</p>
<p>HI - Hearing Impairment - Materials to support hearing impaired (HI) pupils, or those who use sign language.</p> <p>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.</p>		
Hearing impaired support materials	HI.1	<p>The Supplier must produce support materials for Hearing Impaired (HI) pupils for test materials, which are delivered orally.</p> <p>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>

		Please also refer to GM.1 to GM.2 for HI guidance.
SH – Specialist Helpline – (Work package 2 only)		
The Supplier must provide a specialist helpline for schools and other users of modified tests.		
Helpline	SH.1	<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>
OM - Order Management (Work package 2 only)		
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)		
Validation of Orders	OM.4	<p>Test Orders window: October to November 2023</p> <p>Late orders: October 2023 – June 2024</p> <p>The Supplier must ensure that all schools' orders are received and validated:</p> <ul style="list-style-type: none"> • 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 • within 24 hours for late orders • immediately for orders received the week before tests or during the test week • with no more than 1% error tolerance in accuracy of data

PPS - Past Paper Service – Work package 2 only

Modified tests from previous cycles are often used by schools to help determine the most appropriate type of modified paper for a pupil.

Provision of past paper service	PPS.1	The Supplier must provide an on-demand past paper service to schools that contact the Helpline requesting practice materials.
Fulfil past paper orders	PPS.2	The Supplier must fulfil orders for past papers (from three previous years' tests) in MLP and braille. Files will be supplied by STA, where needed, to fulfil these orders. (Approximately 3650 Individual Past papers ordered per year)
DR - Delivery Requirements		
Delivery of final agreed versions of the modified test materials	DR.1	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.
Schedule of delivery	DR.2	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).

Format of materials to be delivered	DR.3	<p>Materials must be supplied at each appropriate stage in the following format:</p> <ul style="list-style-type: none"> • a minimum of 2 hard copies • PDF files and/or open artwork files as required.PDF files and/or open artwork files as required. <p>A full list of all documents produced must be provided to ensure completeness.</p>
Schedule for origination, proofing and sign off	DR.6	<p>The Supplier must work with STA to agree a schedule for origination, proofing and sign off.</p>

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. Work package plans will be baselined after the start-up meeting.

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

Work strand	No.	Deliverables/Outputs	Date
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 shall produce an equality plan for each work package.	1 month after start- up

Business Continuity	BC.2	The Supplier must develop, provide and maintain an incident management plan and business continuity plan	1 month after start- up
Work strand	No.	Deliverables/Outputs	Date
Performance and Quality	PQR.1	The Supplier will 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
Work strand	No.	Deliverables/Outputs	Date
Expertise	EX.1	The Supplier is responsible for recruiting a team of specialist Modifiers	To be confirmed at start-up
Modified Process	MP.1	The Supplier and STA will attend a start-up meeting.	W/c 3 July 2023
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.	September 2023 To be confirmed on or after start-up 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.	September 2023 To be confirmed on or after start-up meeting
Modified Process	MP.3	The Supplier must attend Meeting 1 with STA	To be confirmed on or after start-up meeting (dates for each subject may vary)

Modified Process	MP.4	The Supplier must produce draft proofs, for each TPT item provided by STA. (See MP.10 for draft TPT handover)	To be confirmed on or after start-up meeting
Work strand	No.	Deliverables/Outputs	Date
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.	After they receive Live test construction
Modified Process	MP.5	The Supplier must construct modified discussion test booklets.	To be confirmed on or after start-up meeting
Modified Process	MP.6	The Supplier, including project staff and modifiers, must attend Modified Meeting 2 with STA.	To be confirmed on or after start-up meeting (dates for each subject may vary)
Modified Process	MP.8	The Supplier must produce first proof of all materials.	To be confirmed on or after start-up 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 start-up 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

Work strand	No.	Deliverables/Outputs	Date
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 start-up meeting
Guidance Materials	GM.1	The Supplier must produce administration guidance as specified within the call off.	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.	5 days before meeting 2
Braille Papers	BP.1	The Supplier must construct a braille version of each test.	At each proofing round

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 start-up meeting
3D Models	MOD.1	The Supplier must provide a model specification, where required.	Draft before meeting 2
Work strand	No.	Deliverables/Outputs	Date
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	HI.1	The Supplier must produce support materials for Hearing Impaired (HI) pupils for test materials,	5 days before meeting 2





Specialist Helpline	SH.1	The Supplier must ensure that the Specialist Helpline is operational throughout the full relevant test cycle.	Ongoing
Order Management	OM.4	The Supplier must ensure that all schools' orders are received and validated.	Oct 2023 – June 2024
Past Paper Service	PPS.1	The Supplier must provide an on-demand past paper service to schools	Ongoing

Work strand	No.	Deliverables/Outputs	Date
Past Paper Service	PPS.2	The Supplier must fulfil orders for past papers in MLP and 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 start-up 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 start-up meeting (dates for each subject may vary)
Delivery requirements	DR.3	Materials must be supplied at each appropriate stage in the requested format	To be confirmed on or after start-up 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 start-up meeting (dates for each subject may vary)

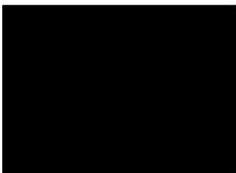
4. Key Payment Milestones and Key Payment Milestones Dates

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

Milest one 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	10%	31 October 2023	
2	EX.1, MP.2, MP.2, MP.5 - MP.7, GM.1, GM.2, BP.2	40%	31 January 2024	
3	MP.8, MP.9, BP.1, BP.3, MOD.1, MOD.2, MLP.1, HI.1	40%	30 April 2024	
4	PM.3, PM.6, MP.10, PM.9, M.1, S.9, PQR.1, PQR.6, MP.4, MP.10, DR.1, DR.2, DR.3, DR.5, DR.7, SH.1 - SH.6, OM.1-OM.5, PPS.1, PPS.2.	10%	31 July 2024	
			TOTAL:	£134,700

5. Supporting documentation

The Modified Tests Framework 2023-2026 Call-Off 01 ITQ document sets out the full specification of requirements including the project deliverables, functional requirements and performance requirements. The original ITQ and the supplier's response are appended to this contract document.





Department
for Education

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

Date: XXXX

INVITATION TO TENDER (ITT)
Modified Tests Framework STA-0299 - Call off 01
for the Standards and Testing Agency

1. This Invitation to Tender (ITT) has been issued by the Standards and Testing Agency (STA), an executive agency of the Department for Education (DfE) for the purpose of review of materials, modified test production, past paper service and provision of modified test helpline services.
2. STA is responsible for producing national curriculum tests (in a standard and modified format) in mathematics, English reading and English grammar, punctuation and spelling for pupils in Key Stage 1 (KS1) and Key Stage 2 (KS2), the Phonics Screening Check (PSC) and Reception Baseline assessments (RBA). This ITT consists of two work packages to provide materials in a modified format.
3. Your organisation, along with others, is invited by the Standards and Testing Agency (STA) (acting on behalf of the Secretary of State for Education), to offer a tender for provision of Call off 1 from the Modified Tests Framework (STA-0299) to the specification outlined in the following documents.

Document 1 Instructions on the tendering procedures (Please also refer to the framework for Departmental standard requirements document)

Document 2 Summary of requirements

Document 3 Specification of requirements:

- a) Deliverables and outputs
- b) General functional requirements
- c) Functional requirements

Document 4 Evaluation Process and Criteria

Document 5 Modified Tests Framework Tender Response Document

Document 6 Attachments and Appendices

- 3 Please read the instructions on the tendering procedures carefully. Failure to comply with them may invalidate your tender which must be emailed to [REDACTED] by 12:00hrs BST on 23 May 2023.

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

Signed for and on behalf of the Supplier:

Name:

[REDACTED]

Title:

[REDACTED]

Signature:

[REDACTED]

Date: Jun 27, 2023

Signed for and on behalf of the Department for Education:

[REDACTED]

Title:

[REDACTED]

Signature:

[REDACTED]

Date: Jun 28, 2023

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