

## Framework Schedule 6 (Order Form Template and Call-Off Schedules)

- Call-off 01 – KS1 TPT – Mathematics
- Call-off 02 – KS2 TPT – English grammar, punctuation and spelling, English reading and Mathematics (anchor and main for all subjects)
- Call Off 03 - KS2 IVT – KS2 English Grammar, Punctuation and Spelling and KS2 English Reading

## Order Form

CALL-OFF REFERENCE:	Call Off 01 – Con_28842 Call Off 02 – Con_28843 Call Off 03 – Con_28844
THE BUYER:	The Department for Education (DfE)
BUYER ADDRESS	20 Great Smith Street, London, SW1P3
THE SUPPLIER:	National Foundation for Educational Research (NFER)
SUPPLIER ADDRESS:	The Mere, Upton Park, Slough, Berkshire, SL1 2DQ
REGISTRATION NUMBER:	Company number: 900899 Charity number: 313392

## Applicable Framework Contract

This Order Form is for the provision of the Call-Off Deliverables and dated 27<sup>th</sup> October 2025

It's issued under the Framework Contract with the reference number Con\_28175 for the provision of Trialling and Sampling Services 2025 - 2028

## Call Off Contracts:

- **Call Off 01** - KS1 TPT – Mathematics
- **Call Off 02** - KS2 TPT – English grammar, punctuation and spelling, English reading and Mathematics (anchor and main for all subjects)
- **Call Off 03** - KS2 IVT – KS2 English Grammar, Punctuation and Spelling and KS2 English Reading

## Call - Off Incorporated Terms

The following documents are incorporated into this Call-Off 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 Call-Off Special Terms and Call-Off Special Schedules.
2. Joint Schedule 1(Definitions and Interpretation) Trialling and Sampling Framework – Master Agreement – Con\_28175
3. The following Schedules in equal order of precedence:

Joint Schedules for Trailing and Sampling Framework (Master Agreement – Con\_28175)

Joint Schedule 2 (Variation Form)  
Joint Schedule 3 (Insurance Requirements)  
Joint Schedule 4 (Commercially Sensitive Information)  
Joint Schedule 10 (Rectification Plan)  
Joint Schedule 11 (Processing Data)

Call Off Schedules (for all 3 call-offs)

Call-Off Schedule 1 (Transparency Reports)  
Call-Off Schedule 2 (Staff Transfer)  
Call-Off Schedule 3 (Continuous Improvement)  
Call-Off Schedule 5 (Pricing Details)  
Call-Off Schedule 9 (Security)  
Call-Off Schedule 10 (Exit Management)  
Call-Off Schedule 14 (Service Levels)  
Call-Off Schedule 15 (Call-Off Contract Management)  
Call-Off Schedule 20 (Call-Off Specification)

4. CCS Core Terms (version 3.0.4)

5. Joint Schedule 5 (Corporate Social Responsibility) Trailing and Sampling Framework Master Agreement – Con\_28175)

6. Call-Off Schedule 4 (Call-Off Tender) as long as any parts of the Call-Off Tender that offer a better commercial position for the Buyer (as decided by the Buyer) take precedence over the documents above.

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

CALL - OFFs START DATE:

November 2025

CALL – OFFs EXPIRY DATE:

16<sup>th</sup> October 2026

## **Call Off Deliverables**

As detailed Annex 1

## **Maximum Liability**

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

The Estimated Year 1 Charges used to calculate liability in the first Contract Year is £1.7M (for all 3 Call Offs).

## **Call – off Charges**

As detailed in Annex 2 (Call Off Schedule 5 – Pricing details)

## **Reimbursable Expenses**

None

## **Payment Method**

Payment will in arrears on completion of the milestones set out in the Specification document – see Annex 1 for details

Email all invoices (in pdf format) directly to the

[REDACTED]

## **Buyer's Authorised Representative**

[REDACTED]

## **Buyer's Environmental Policy**

[Sustainability and climate change strategy - GOV.UK](#)

## **Buyer's Security Policy**

As detailed in Call-Off Schedule 9 (Trialling and Sampling Framework 2025 – 2028)

## **Supplier's Authorised Representative**

[REDACTED]

## Supplier's Contract Manager

[REDACTED]

## Progress Report Frequency

To be agreed at the start up meeting

## Progress Meeting Frequency

To be agreed at the start up meeting

## Key Staff

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

## Key subcontractor(s)

Stephen Austin and Sons Ltd

## Commercially Sensitive Information

Supplier's Commercially Sensitive Information

No.	Date	Item(s)	Duration of Confidentiality

1	01/07/2025	Staff names and information (including organisation structure and solution team structure)	Perpetual
2	01/07/2025	Methodology and processes are NFER's Intellectual Property Right (including but not limited to NFER's proposals/tenders and subsequent work, NFER's Suppliers, Register of Schools, Marker/TA details, Survey Admin System, School Portal and on-screen marking system as NFER's pre-existing Intellectual Property Right). This information if disclosed to any third party or Replacement Supplier would, or would be likely to, prejudice the commercial interests of NFER and cannot be disclosed without a potential impact on the outcome of future tenders and significant prejudice to NFER's commercial and financial interests and should be exempt from disclosure under Section 43(1) for information which is a trade secret.	Perpetual
3	01/07/2025	Pricing including details of daily rates and other charges, invoicing and milestones or breakdown of costs	Perpetual
4	01/07/2025	NFER's Exit Plan, Security Management Plan, Transparency Reports as all will contain Commercially Sensitive information about the Supplier's systems, processes and pricing and could cause serious harm if disclosed to third parties.	Perpetual

## Service Credits

Managing key performance requirements is essential to delivering this project on-time and in full and will be monitored throughout the life of the project and form part of the contractual relationship. Please review and confirm acceptance within your submission.

### Performance requirements

The table in 1b\_Deliverables and Outputs lists the key performance requirements and dates for this contract. Failure to complete 100% on one or more of these to the required

standard will impact upon payment with reference to the payment milestones schedule in the tables 1.d.1 and 1.d.2 below.

Service credits may be applied to the following key deliverables:

Performance requirement reference	Deliverable	Expectation
PR_1	5.01a – Electronic delivery of pupil data (interim – partial)	On time delivery by 10am on specified fixed date
PR_2	5.01b – Electronic delivery of pupil data (interim – full)	On time delivery by 10am on specified fixed date
PR_3	5.01c – Electronic delivery of pupil data (final)	On time error-free delivery by 10am on specified fixed date
PR_4	5.03 – Final data feed – item level (100% of marks) – KS2 TPT (anchor)	On time error-free delivery by 10am on specified fixed date
PR_5	5.03 – Final data feed – item level (100% of marks) – KS1 TPT / KS2 TPT (main)	On time error-free delivery by 10am on specified fixed date
PR_6	5.03 – Final data feed – item level (100% of marks) – KS2 IVT	On time error-free delivery by 10am on specified fixed date

Service credits may be applied according to the impact caused by failure to meet the specified performance requirement:

Performance requirement reference	Delay duration	Time to achieve 100% quality	Service credit % (against payment milestone)
PR_1 PR_2 (all call-offs)	Up to 1 business day	Up to 1 business day	1%
PR_1 PR_2 (all call-offs)	1 to 3 business days	1 to 3 business days	2%
PR_1 PR_2	> 3 business days	> 3 business days	3%

(all call-offs)

PR_3 (KS2 TPT anchor)	Up to 1 business day	Up to 1 business day	1%
PR_3 (KS2 TPT anchor)	1 to 3 business days	1 to 3 business days	2%
PR_3 (KS2 TPT anchor)	> 3 business days	> 3 business days	3%
PR_3 (KS1 TPT, KS2 TPT(main), KS2 IVT)	1-2 business days	1-2 business days	1%
PR_3 (KS1 TPT, KS2 TPT(main), KS2 IVT)	2-4 business days	2-4 business days	2%
PR_3 (KS1 TPT, KS2 TPT(main), KS2 IVT)	> 4 business days	> 4 business days	3%
PR_4	Up to 1 business day	Up to 1 business day	1%
PR_4	1 to 3 business days	1 to 3 business days	2%
PR_4	> 3 business days	> 3 business days	3%
PR_5 PR_6	1-2 business days	1-2 business days	1%
PR_5 PR_6	2-4 business days	2-4 business days	2%
PR_5 PR_6	> 4 business days	> 4 business days	3%

Deliverables / outputs with fixed dates are shown emboldened in the tables below.

Payment will follow the successful completion of the milestones listed in the tables below.

## Additional Insurances

Not applicable

## Guarantee

Not applicable

## Social Value Commitment

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

For and on behalf of the Supplier:		For and on behalf of the Buyer:	
Signature:		Signature:	
Name:		Name:	
Role:	Interim Finance Director	Role:	Associate Commercial Specialis
Date:	06/11/2025	Date:	13/11/25

## Annex 1 – Deliverables and Outputs

### Specification of Requirements

#### 1.b Deliverables and outputs

There are 7 overarching deliverable areas:

1. Project management
2. Management of schools
3. Administration (including management of all administrator-related activities)
4. Coding (including management of coders and coding-related activities)
5. Data (including capture, quality assurance and delivery of data)
6. Printing, logistics and scanning
7. Security

#### Notes for guidance:

- The numbering below relates to each deliverable/output activity which is also linked to the breakdown of the payment milestones.
- The deliverables and outputs are presented in chronological order for each trialling project.
- Deliverables with references prefixed “STA” in the table below are **not** deliverables for the Supplier. They are dates when STA will provide the Supplier with the information they will require to complete a deliverable.
- All emboldened dates are fixed as detailed in table 1.a. **All ‘fixed dates’ are non-negotiable** and must be incorporated into the Supplier’s project plan as detailed.
- All other dates below are provided as a guide. It should be noted that they are proposed because they co-ordinate with the STA test development process activities. The Supplier must provide a timeline, which must include their confirmed dates for these deliverables, using these dates as a guide. All proposed project plans and timelines will be discussed in the start-up meeting.

Table 1.a

Deliverable and Output category	Ref #	Deliverable/ Output	Milestone	KS1 TPT	KS2 TPT anchors only	KS2 TPT	KS2 IVT
Project Management	1.01	Documents in advance of start-up meeting	<p>The Supplier must provide the following:</p> <ul style="list-style-type: none"> <li>Detailed project timeline</li> <li>Document tracker</li> <li>Detailed Risk and issues log</li> <li>Draft contingency plan</li> <li>Overview of proposed product descriptions</li> </ul>	<p>Draft in advance of the start-up meeting.</p> <p>Final sign-off by STA no later than 2 weeks after start-up. W/C 17-Nov-25</p>	<p>Draft in advance of the start-up meeting.</p> <p>Final sign-off by STA no later than 2 weeks after start-up. W/C 17-Nov-25</p>	<p>Draft in advance of the start-up meeting.</p> <p>Final sign-off by STA no later than 2 weeks after start-up. W/C 17-Nov-25</p>	<p>Draft in advance of the start-up meeting.</p> <p>Final sign-off by STA no later than 2 weeks after start-up. W/C 17-Nov-25</p>
Project Management	1.02	Start-up meeting	<p>The Supplier must attend a project start-up meeting, either face to face or remote (to be discussed at start of contract) with STA and provide all documentation required.</p> <p>(For details see 1.c Functional Requirements – start-up meetings)</p>				
Project Management	1.03	Checkpoint meetings	<p>The Supplier must attend weekly checkpoint meetings providing updates on the progress of the project.</p>	TBC at start-up	TBC at start-up	TBC at start-up	TBC at start-up
Project Management	1.04 (a)	Equalities plan - initial	<p>The Supplier must produce an equalities plan at intervals during the project.</p> <p>The initial plan must set out how the Supplier intends to meet the Equalities requirements as set out in the Trialling and Sampling Framework 2025-28.</p> <p>(For details see 1.c Functional Requirements – Equalities Plan)</p>	<p>Draft in advance of the start-up meeting.</p> <p>Final sign-off by STA no later than 2 weeks after start-up.</p>	<p>Draft in advance of the start-up meeting.</p> <p>Final sign-off by STA no later than 2 weeks after start-up.</p>	<p>Draft in advance of the start-up meeting.</p> <p>Final sign-off by STA no later than 2 weeks after start-up.</p>	<p>Draft in advance of the start-up meeting.</p> <p>Final sign-off by STA no later than 2 weeks after start-up.</p>
Management of schools	2.01	Schools Communication strategy	<p>The Supplier must provide a communication strategy outlining the approach they would take to communicating with schools and local authorities or multi-academy trusts.</p> <p>(For details see  <ul style="list-style-type: none"> <li>Trialling and Sampling Framework (OMS.9)</li> </ul> 1.c Functional Requirements – School management)</p>	<p>Draft in advance of the start-up</p> <p>Final deliverable date to be agreed with Supplier</p>	<p>Draft in advance of the start-up</p> <p>Final deliverable date to be agreed with Supplier</p>	<p>Draft in advance of the start-up</p> <p>Final deliverable date to be agreed with Supplier</p>	<p>Draft in advance of the start-up</p> <p>Final deliverable date to be agreed with Supplier</p>

Deliverable and Output category	Ref #	Deliverable/ Output	Milestone	KS1 TPT	KS2 TPT anchors only	KS2 TPT	KS2 IVT
Project Management	1.05	School Recruitment and retention strategy	The Supplier must provide a school recruitment and retention strategy.  (For details see 1.c Functional Requirements – School management)	Draft in advance of the start-up.  Final sign-off date to be agreed with the supplier.	Draft in advance of the start-up.  Final sign-off date to be agreed with the supplier.	Draft in advance of the start-up.  Final sign-off date to be agreed with the supplier.	Draft in advance of the start-up.  Final sign-off date to be agreed with the supplier.
Project Management	1.06	Exit and Transition plans	The Supplier must provide: 1) a Routine exit and transition plan (ET.1) 2) an emergency exit and transition plan (ET.2)  (For details see 1.c Functional Requirements – Exit and transition)	Draft in advance of the start-up.  Final sign-off no later than 23-Jan-26	Draft in advance of the start-up.  Final sign-off no later than 23-Jan-26	Draft in advance of the start-up.  Final sign-off no later than 23-Jan-26	Draft in advance of the start-up.  Final sign-off no later than 23-Jan-26
Project Management	1.07	Technical print & scanning requirements	The Supplier must provide documentation detailing their printing and scanning requirements. Queries or issues to be discussed in start-up meeting.  (For details see the following sections in the Trialling and sampling framework: • P – Printing • CTS – Script receipt, scanning, matching and script storage CTS.36-CTS.44)	Draft in advance of the start-up.  Final sign-off date to be agreed with the supplier.	Draft in advance of the start-up.  Final sign-off date to be agreed with the supplier.	Draft in advance of the start-up.  Final sign-off date to be agreed with the supplier.	Draft in advance of the start-up.  Final sign-off date to be agreed with the supplier.
Project Management	1.08	Example test cover(s)	The Supplier must provide examples of test booklet covers for each subject.  (For details see: 1c – 1.04 – Start-up meetings and the following sections in the Trialling and sampling framework: • P – Printing • CTS – Script receipt, scanning, matching and script storage CTS.36-CTS.44)	Draft in advance of the start-up.  Final sign-off date to be agreed with the supplier.	Draft in advance of the start-up.  Final sign-off date to be agreed with the supplier.	Draft in advance of the start-up.  Final sign-off date to be agreed with the supplier.	Draft in advance of the start-up.  Final sign-off date to be agreed with the supplier.
Project Management	1.09	Business Continuity	The Supplier must provide a written report confirming that business continuity arrangements and processes, including IT disaster recovery plans, have been exercised in the last 12 months.	Final to be signed off no later than 23_jan_26	Final to be signed off no later than 23-Jan-26	Final to be signed off no later than 23-jan-26	Final to be signed off no later than 23-Jan-26

Deliverable and Output category	Ref #	Deliverable/ Output	Milestone	KS1 TPT	KS2 TPT anchors only	KS2 TPT	KS2 IVT
Security	7.01	Security Policy	(Business Continuity details will be documented in the Supplier Security Questionnaire) The Supplier must provide a copy of their security policy, to demonstrate compliance with Departmental Security Standards.	In advance of the start-up.	In advance of the start-up.	In advance of the start-up.	In advance of the start-up.
Security	7.02	Security management plan	(For further details see 1.c Functional requirements – 7. Security - 7.01) The Supplier must provide their Security Management Plan, detailing the processes in place to manage the physical and digital security of test materials at all times.	Draft in advance of the start-up.	Draft in advance of the start-up.	Draft in advance of the start-up.	Draft in advance of the start-up.
Project Management	1.10	Management information reports	(For further details see 1.c Functional requirements – 7. Security - 7.03 & 7.04) The Supplier must submit Management information reports (MI) and performance reports.  (1.10a-j are included in this document; for further details see: <ul style="list-style-type: none"> <li>1.c Functional Requirements – Management information</li> <li>1.d Payment milestones)</li> </ul>	Final sign-off date to be agreed with the supplier. Ongoing during relevant project phases	Final sign-off date to be agreed with the supplier. Ongoing during relevant project phases	Final sign-off date to be agreed with the supplier. Ongoing during relevant project phases	Final sign-off date to be agreed with the supplier. Ongoing during relevant project phases
Coding	STA4a	Coder recruitment register  (fixed date)	<b>STA will provide the coder recruitment register from which the Suppliers can recruit for the Supervisory, non-supervisory and senior coder roles.</b>	<b>09-Dec-25</b>	<b>09-Dec-25</b>	<b>09-Dec-25</b>	<b>09-Dec-25</b>
Data	STA5a	Pupil Data Specification	STA will provide the Supplier with a final Pupil Data specification.	09-Dec-25	09-Dec-25	09-Dec-25	09-Dec-25
Security	7.03	Departmental Security Assurance Model	The supplier must provide any information necessary to meet the DfE's security assurance process requirements.  (For further details see 1.c Functional requirements – 7. Security - 7.01)	TBC at start-up  Anticipate Dec/Jan	TBC at start-up  Anticipate Dec/Jan	TBC at start-up  Anticipate Dec/Jan	TBC at start-up  Anticipate Dec/Jan
Management of schools	STA2a	Sample of schools  (fixed date)	<b>STA will provide the Supplier with the list of schools selected for participation in 2026 trials.</b>	<b>16-Jan-26</b>	<b>16-Jan-26</b>	<b>16-Jan-26</b>	<b>16-Jan-26</b>

Deliverable and Output category	Ref #	Deliverable/ Output	Milestone	KS1 TPT	KS2 TPT anchors only	KS2 TPT	KS2 IVT
Project Management	1.11	Event venues	<p>For all events, the Supplier must obtain x 3 quotes for venues, to demonstrate to STA that all factors have been considered, venues proposed meet STA's requirements and the best value for money is achieved.</p> <p><b>Administrator training events</b></p> <p>For details see:</p> <ul style="list-style-type: none"> <li>• Trialling and sampling framework (RTMA.7)</li> <li>• 1.c Functional Requirements – Event management – administrator training</li> </ul> <p><b>Coding/coder training events (excl. Phonics)</b></p> <p>(For details see:</p> <ul style="list-style-type: none"> <li>• Trialling and sampling framework (CTS.15)</li> <li>• 1.c Functional Requirements – Event management – pre-coding, coder training, and coder events)</li> </ul>	No later than 16-Jan-26	No later than 16-Jan-26	No later than 16-Jan-26	No later than 16-Jan-26
Management of schools	2.02	Contacting local authorities or multi academy trusts	<p>The Supplier must contact local authorities or multi academy trusts to inform them of schools selected for participation in the trial before schools are contacted.</p> <p>Communications must be tailored according to key stage, trial and subject.</p> <p>(For details see 1.c Functional Requirements – School management)</p>	By the end of Jan-26	By the end of Jan-26	By the end of Jan-26	By the end of Jan-26
Management of schools	2.03	Contacting local authorities or multi academy trusts – assurance	<p>A written assurance statement must be provided by the Supplier when this activity is complete.</p>	Within 3 working days of activity completion	Within 3 working days of activity completion	Within 3 working days of activity completion	Within 3 working days of activity completion
Management of schools	STA2b	Pupil census data	<p>If a data sharing agreement is in place, STA will provide the Supplier with an extract of pupil census data for selected class/pupils.</p> <p>(For details see 1.c Functional requirements – 3c.05 Pupil Data)</p>	By mid Feb-26	By mid Feb-26	By mid Feb-26	By mid Feb-26

Deliverable and Output category	Ref #	Deliverable/ Output	Milestone	KS1 TPT	KS2 TPT anchors only	KS2 TPT	KS2 IVT
Management of schools	2.04	Contacting schools	The Supplier must contact all schools and inform them of their selection for participation in the trial.  Communications must be tailored according to key stage, trial and subject.  (For details see 1.c Functional Requirements – School management)	By mid Feb-26	By mid Feb-26	By mid Feb-25	By mid Feb-26
Project Management	1.10a	Management information reports – school uptake progress	The Supplier must report on the progress of school uptake in the weekly checkpoint meetings.	Weekly during the relevant project phase	Weekly during the relevant project phase	Weekly during the relevant project phase	Weekly during the relevant project phase
Project Management	1.10b	Management information reports - helplines	The Supplier must report on helpline activity in the weekly checkpoint meetings,  (For details see: 1.c Functional Requirements – 9.01 – Helplines)	Weekly during the relevant project phase	Weekly during the relevant project phase	Weekly during the relevant project phase	Weekly during the relevant project phase
Management of schools	2.05	Contacting schools - assurance	A written assurance statement must be provided by the Supplier when this activity is complete.	Within 3 working days of activity completion	Within 3 working days of activity completion	Within 3 working days of activity completion	Within 3 working days of activity completion
Management of schools	2.06	Contacting schools - top up sample	The Supplier must inform STA, in writing, if replacement school sample is required, due to any agreed withdrawal or non-participation of schools in the initial sample.  (For details see section OMS in the Trialling and sampling framework)	By 13-Feb-26	By 13-Feb-26	By 13-Feb-26	By 13-Feb-26
Project Management	1.12	Process walk-through meeting	The Supplier must present STA with a complete end to end process walk-through at their site.  (For details see 1.c Functional Requirements – Process walk through)	No later than 13-Feb-26	No later than 13-Feb-26	No later than 13-Feb-26	No later than 13-Feb-26
Project Management	1.13	Product descriptions	Final product descriptions must be submitted and signed off, by STA, no later than 2 weeks following the process walk through.  (For details see 1.c Functional Requirements – Product descriptions)	2 weeks after process walk-through	2 weeks after process walk-through	2 weeks after process walk-through	2 weeks after process walk-through

Deliverable and Output category	Ref #	Deliverable/ Output	Milestone	KS1 TPT	KS2 TPT anchors only	KS2 TPT	KS2 IVT
Management of schools	STA2c	Sample of schools – top up	STA will provide the Supplier with replacement schools if required to cover any shortfall due to any agreed withdrawal or non-participation of schools in the initial sample.	1 week after request and no later than 20-Feb-26	1 week after request and no later than 20-Feb-26	1 week after request and no later than 20-Feb-26	1 week after request and no later than 20-Feb-26
Printing, logistics and scanning	STA6a	Draft test booklet handover	STA will provide draft booklets for the Supplier to use to test their printing and scanning systems.	End of Jan-26	End of Jan-26	End of Jan-26	First week of Mar-26
Coding	4.01	Coding planning meeting	Supplier and STA to meet to confirm requirements for pre-coding and coding events, including coder numbers and roles. This should take place at least x 8 weeks before the first coding event. STA requires the final copy of the documentation to support this meeting no later than 1 week prior to the meeting.	Feb-26	Feb-26	Feb-26	Feb-26
			(For details see 1.c Functional Requirements – Coding planning meeting)				
Printing, logistics and scanning	6.01	Print and scanning compatibility checks	The Supplier must test their print and scanning processes to ensure everything works as expected and meets the specified requirements. The Supplier should generate test data as live pupil data will not be provided for this purpose.	20-Feb-26	20-Feb-26	20-Feb-26	31-Mar-26
Printing, logistics and scanning	6.02	Print and scanning compatibility checks – assurance	The Supplier must provide a written assurance statement to confirm that all printing and scanning work has been completed as intended.	Within 3 working days of activity completion	Within 3 working days of activity completion	Within 3 working days of activity completion	Within 3 working days of activity completion
Coding	4.02	<b>Recruitment of Supervisory, non-supervisory and senior coders - Contracts award</b>	<b>The Supplier must ensure that all contracts are sent out to potential supervisory, non-supervisory and senior coders on the date specified.</b>	<b>26-Feb-26</b>	<b>26-Feb-26</b>	<b>26-Feb-26</b>	<b>26-Feb-26</b>
		(fixed date)	(For details see: <ul style="list-style-type: none"> <li>1.c Functional Requirements –4a Coder recruitment: Recruiting and contracting all supervisory and non-supervisory coders section</li> <li>Appendix C - coding model requirements)</li> </ul>				
Coding	4.03	Recruitment of Supervisory, non-supervisory and senior coders	The Supplier must provide a written assurance statement confirming that all contracts have been sent out to potential supervisory, non-supervisory and senior coders.	26-Feb-26	26-Feb-26	26-Feb-26	26-Feb-26

Deliverable and Output category	Ref #	Deliverable/ Output	Milestone	KS1 TPT	KS2 TPT anchors only	KS2 TPT	KS2 IVT
Project Management	1.10c	ior coders - Contracts award assurance Management information reports – coder recruitment	The Supplier must report on the progress of coder recruitment in the weekly checkpoint meetings.  (For details see: <ul style="list-style-type: none"> <li>1.c Functional Requirements – coder recruitment</li> </ul> coding model requirements in Appendix C) STA will provide final, signed off coding frames and training materials for the Supplier to print for the Pre-coding meeting 1.	Weekly until all coder contracts have been returned	Weekly until all coder contracts have been returned	Weekly until all coder contracts have been returned	Weekly until all coder contracts have been returned
Coding	STA4b	Coding frames & training materials (Anchor pre-coding)	STA will provide final, signed off coding frames and training materials for the Supplier to print for the Pre-coding meeting 1.	N/A	TBC at start-up	N/A	N/A
Coding	STA4c	Coding frames (Pre-coding)	STA will provide draft coding frames for the Supplier to print for the Pre-coding meeting 1.	TBC at start-up	N/A	TBC at start-up	N/A
<b>Printing, logistics and scanning</b>	<b>STA6b</b>	<b>STA - Handover of final test booklets from STA</b>  <b>(fixed date)</b>	<b>STA will provide final, signed off test booklets for the Supplier to print.</b>	<b>10-Mar-26</b>	<b>10-Mar-26</b>	<b>10-Mar-26</b>	<b>09-Apr-26</b>
Printing, logistics and scanning	STA6c	Print proofing	STA will provide the Supplier with a hard copy of each test booklet, prior to print proofing.  (For details see 1.c Functional Requirements – Print proofing)	x1 working day before print proofing commences	x1 working day before print proofing commences	x1 working day before print proofing commences	x1 working day before print proofing commences
Printing, logistics and scanning	6.03	Print proofing	The Supplier must provide print proofs for STA to check the print quality of each test booklet version, and sign off, before printing commences.  (For details see 1.c Functional Requirements – Print proofing)	12-13 Mar-26	12-13 Mar-26	12-13 Mar-26	14-15 Apr-26
Printing, logistics and scanning	6.04	Print proofing – assurance	A written assurance statement must be provided by the Supplier when this activity is complete.	Within 3 working days of activity completion	Within 3 working days of activity completion	Within 3 working days of activity completion	Within 3 working days of activity completion
Management of schools	2.07	Submission of allocation report on number of schools participating	The Supplier must provide a report showing the final number and allocation of schools and pupils to test combination by region and attainment band, and confirmation of number of pupils per	Approximately 1 week before	Approximately 1 week before	Approximately 1 week before	Approximately 1 week before

Deliverable and Output category	Ref #	Deliverable/ Output	Milestone	KS1 TPT	KS2 TPT anchors only	KS2 TPT	KS2 IVT
			school to demonstrate the representativeness of the sample recruited.	trial material is printed	trial material is printed	trial material is printed	trial material is printed
			This must be provided for STA approval <b>before</b> materials are printed in advance of the trial administration period.				
			(For details see 1.c Functional Requirements – Management information)				
Management of schools	2.08	Submission of school visit report	The Supplier must provide a report showing the allocation of tests to schools who have consented to STA observation visits.	After allocation of administrators and at least 1 week prior to administration.	After allocation of administrators and at least 1 week prior to administration.	After allocation of administrators and at least 1 week prior to administration.	After allocation of administrators and at least 1 week prior to administration.
Administration	3.01	Administration guidance	The Supplier must work in consultation with STA to produce the Administrator guide.	To be available prior to the administrator training	To be available prior to the administrator training	To be available prior to the administrator training	To be available prior to the administrator training
			The Supplier must provide final versions for STA review and sign off.				
			(For details see the following sections in the 1.c Functional Requirements document:				
			<ul style="list-style-type: none"> <li>3c Administration and administrators - project management documentation</li> </ul>				
Administration	3.02	School and administrator questionnaires	The Supplier must work in consultation with STA to produce the Administrator questionnaire and school questionnaire.	Final signoff no later than 2 weeks prior to Administration	Final signoff no later than 2 weeks prior to Administration	Final signoff no later than 2 weeks prior to Administration	Final signoff no later than 2 weeks prior to Administration
			The Supplier must provide final versions for STA review and sign off.				
			(For details see the following sections in the 1.c Functional Requirements document:				
			<ul style="list-style-type: none"> <li>1. Project management - final report</li> <li>1. Project management - questionnaire analysis report</li> <li>3c Administration and administrators - project</li> </ul>				

Deliverable and Output category	Ref #	Deliverable/ Output	Milestone	KS1 TPT	KS2 TPT anchors only	KS2 TPT	KS2 IVT
Administration	3.03	Pupil data forms	<p>management documentation</p> <p>The Supplier must work in consultation with STA to produce the pupil data forms.</p> <p>The Supplier must provide final versions for STA review and sign off.</p> <p>(For details see the following sections in the 1.c Functional Requirements document:</p> <ul style="list-style-type: none"> <li>• 3c Administration and administrators - project management documentation</li> <li>• 3c Administration and administrators - pupil data)</li> </ul>	Before test materials are printed ahead of the administration window	Before test materials are printed ahead of the administration window	Before test materials are printed ahead of the administration window	Before test materials are printed ahead of the administration window
Administration	3.04	Recruitment of administrators	<p>The Supplier must recruit enough administrators to ensure administration of all DfE trials can be completed in the administration window.</p> <p>The Supplier must report on recruitment progress in the checkpoint meetings.</p> <p>(For details see 1.c Functional Requirements – 3c Administration and administrators - administrator recruitment)</p>	Prior to training event in March	Prior to training event in March	Prior to training event in March	Prior to training event in March
Project Management	1.10d	Management information reports – administrator recruitment	<p>The Supplier must report on the progress of administrator recruitment in the weekly checkpoint meetings.</p>	Weekly during the relevant project phase	Weekly during the relevant project phase	Weekly during the relevant project phase	Weekly during the relevant project phase
Administration	3.05	Recruitment of administrators - assurance	<p>The Supplier must provide a written assurance statement confirming recruitment is complete.</p>	Within 3 working days of activity completion	Within 3 working days of activity completion	Within 3 working days of activity completion	Within 3 working days of activity completion
Administration	3.06	Training of administrators	<p>The Supplier must train all recruited administrators to ensure administration of all STA trials can be successfully completed in the administration window.</p> <p>All training events should take place in March.</p> <p>(For details see 1.c Functional Requirements – 3c Administration and administrators - Adminis-</p>	trator Training)			

Mar-26  
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Deliverable and Output category	Ref #	Deliverable/ Output	Milestone	KS1 TPT	KS2 TPT anchors only	KS2 TPT	KS2 IVT
Coding	4.04	Coding plan (including training)	The Supplier must provide a final coding plan for review and sign off with STA.  (For details see 1.c Functional Requirements – Coding plan and coder training plan)	by 30-Mar-26	by 30-Mar-26	by 30-Mar-26	by 27-Apr-26
Project Management	1.14	Final report and questionnaire analysis report format	The Supplier must propose contents of the final trial report and questionnaire analysis report for STA to review and sign off.  (For details see 1.c Functional Requirements – 1. Project management - Final report and questionnaire analysis reports)	Mar/Apr-26	Mar/Apr-26	Mar/Apr-26	Mar/Apr-26
Administration	3.07	Training of administrators assurance	The Supplier must provide written assurance that all appropriate training has been delivered/completed.	No later than 1 week prior to Administration	No later than 1 week prior to Administration	No later than 1 week prior to Administration	No later than 1 week prior to Administration
Coding	4.05	Recruitment of Supervisory, non-supervisory and senior coders - assurance	The Supplier must provide a written assurance statement confirming recruitment of all coders meets the criteria specified for recruitment and contract returns are complete.	Within 3 working days of activity completion	Within 3 working days of activity completion	Within 3 working days of activity completion	Within 3 working days of activity completion
Printing, logistics and scanning	6.05	Printing of test materials	The Supplier must print all test materials to the defined quality (as signed off at print proof).  (For details see Trialling and sampling framework (P.2, P.3) 'Test materials for print' tab in the Appendix C Trialling Information Spreadsheet)	At least 1 week before administration begins	At least 1 week before administration begins	At least 1 week before administration begins	At least 1 week before administration begins
Printing, logistics and scanning	6.06	Printing of test materials - assurance	The Supplier must provide a written assurance statement confirming that all test booklet materials have been printed.	At least 1 week before administration begins	At least 1 week before administration begins	At least 1 week before administration begins	At least 1 week before administration begins
Administration	3.08	Collate and distribute test booklets to administrators/schools	The Supplier must collate trial tests materials into school packs for secure distribution to and return by administrators. The supplier must provide daily MI delivery reports, throughout the process.  (For details see 1.c Functional Requirements – 3c Administration and administrators – Secure deliveries of test materials)	Apr-25	Apr-25	Apr-25	May-25

Deliverable and Output category	Ref #	Deliverable/ Output	Milestone	KS1 TPT	KS2 TPT anchors only	KS2 TPT	KS2 IVT
Project Management	1.10e	Management information reports – parcel tracking	The Supplier must provide updates on parcel tracking when materials are in transit i.e. before and after trial administration.	Twice daily during the relevant project phase	Twice daily during the relevant project phase	Twice daily during the relevant project phase	Twice daily during the relevant project phase
Administration	3.09	Collate and distribute test booklets to administrators/schools - assurance	The Supplier must provide a written assurance statement confirming when this activity is complete.	Prior to start of administration	Prior to start of administration	Prior to start of administration	Prior to start of administration
<b>Administration</b>	<b>3.10</b>	<b>Test administration window (fixed dates)</b>	<p><b>The Supplier must ensure that all trials are administered within the test administration dates for each Trial.</b></p> <p>*KS2 TPT anchor only - ideally all anchors should be completed within the first week and within a week from start date.</p>	<b>13-24 Apr-26</b>	<b>13-24 Apr-26</b>	<b>13-24 Apr-26</b>	<b>18-22 May-26 and 01-05 Jun-26</b>
Project Management	1.10f	Management information reports – trial administration progress	The Supplier must report on the progress of trial administration.	Daily during the trial administration window	Daily during the trial administration window	Daily during the trial administration window	Daily during the trial administration window
Administration	3.11	Test administration assurance	The Supplier must provide written assurance that all administration of the trial test booklets was completed within the designated administration window.	09-May-25	09-May-25	09-May-25	13-Jun-25
Administration	3.12	Collecting pupil data	<p>Every attempt must be made to confirm pupil data <b>prior</b> to trial administration using a secure electronic solution.</p> <p>The Supplier must ensure that any additional or missing pupil data is collected by the Administrator on the day of administration.</p> <p>(For details see the following sections in the 1.c Functional Requirements document:</p> <ul style="list-style-type: none"> <li>3c Administration and administrators - project management documentation</li> <li>3c Administration and administrators - pupil data)</li> </ul>	No later than 01-May-26	No later than 01-May-26	No later than 01-May-26	No later than 12-Jun-26
Administration	3.13	Collecting pupil data - assurance	The Supplier must provide a written assurance statement confirming all pupil data has been obtained.	No later than 01-May-26	No later than 01-May-26	No later than 01-May-26	No later than 12-Jun-26

Deliverable and Output category	Ref #	Deliverable/ Output	Milestone	KS1 TPT	KS2 TPT anchors only	KS2 TPT	KS2 IVT
Data	STA5b	Data Specification (initial)	STA will provide the Supplier with an initial data specification to assist with set-up of coding data capture systems and/or processes. This deliverable applies to both on-screen and paper-based coding.	TBC at start-up  Anticipate late Mar/early Apr-26	TBC at start-up  Anticipate end of Mar-26	TBC at start-up  Anticipate end of Mar-26	TBC at start-up  Anticipate end of Apr-26
Data	STA5c	Questionnaire analysis template	STA will provide the Supplier with a template for the questionnaire analysis data output.	TBC at start-up  Anticipate late Mar/early Apr-26	TBC at start-up  Anticipate late Mar/early Apr-26	TBC at start-up  Anticipate late Mar/early Apr-26	TBC at start-up  Anticipate late Apr/early May-26
Data	STA5d	Data Specification (draft)	STA will provide the Supplier with a draft data specification.	TBC at start-up  Anticipate mid May-26	TBC at start-up  Anticipate early Apr-26	TBC at start-up  Anticipate early May-26	TBC at start-up  Anticipate late Jul-26
Coding	4.06	Allocation of tests to Supervisory coders	The Supplier must provide a written assurance statement detailing the allocation of tests to Supervisory coders.	No later than 2 weeks before pre-coding	No later than 2 weeks before pre-coding	No later than 2 weeks before pre-coding	N/A
Project Management	1.04 (b)	Equalities plan - interim	The Supplier must produce an interim equalities plan after all administrator and coder recruitment is completed.  (For details see 1.c Functional Requirements - 'Equalities plan')	After completion of administrator and coder recruitment	After completion of administrator and coder recruitment	After completion of administrator and coder recruitment	After completion of administrator and coder recruitment
Coding	STA4d	Anchor seeds and standardisations	STA will provide the supplier with the Anchor Seeds and Standardisations information for upload to the OSC in advance of PCM1. This will consist of: <ul style="list-style-type: none"> <li>- seed and standardisation items in PDF format</li> <li>- summary of seed and standardisation items including agreed codes</li> </ul> (For details see 1.c Functional Requirements - Pre – coding OSC)	N/A	To be confirmed at start-up. Anticipate by end Mar-26.	N/A	N/A

Deliverable and Output category	Ref #	Deliverable/ Output	Milestone	KS1 TPT	KS2 TPT anchors only	KS2 TPT	KS2 IVT
Coding	4.07	On-screen pre-coding review area	<p>The supplier must create an on-screen coding preview area and provide any appropriate training to supervisory coders.</p> <p>This deliverable also applies to KS1 TPT if an OSC process is proposed for pre-coding.</p> <p>(For details see 1.c Functional Requirements - Pre-coding – OSC system preview area)</p>	At least 1 week before pre-coding (if OSC proposed)	At least 1 week before pre-coding	At least 1 week before pre-coding	N/A
Coding	4.08	OSC training materials	<p>The supplier must provide specific OSC training guidance. STA will review and approve at least one week before any OSC activities begin. This applies to PCM1, PCM2 and coder training events for KS2 TPT.</p> <p>It also applies to KS1 TPT if an OSC process is proposed for pre-coding.</p>	At least 1 week before OSC is used if applicable	At least 1 week before OSC is used	At least 1 week before OSC is used	N/A
Data	5.01a	Electronic delivery of pupil data (interim - partial) (fixed date)	<p><b>The Supplier must securely transfer interim pupil data to STA for all tests in a format agreed with STA. An example of a pupil data specification is provided by STA in Appendix B.</b></p>	<b>08-May-26 by 10am</b>	<b>08-May-26 by 10am</b>	<b>08-May-26 by 10am</b>	<b>19-Jun-26 by 10am</b>
Administration	3.14	Validate returned scripts and report nil responses	<p>The Supplier must provide evidence that all trial materials have been returned from the administrators and all are accounted for within the agreed timescales.</p> <p>The Supplier must validate returned scripts and provide a written report to STA to explain why any scripts have been removed due to nil responses or any other reasons.</p>	No later than 2 weeks after administration is complete	No later than 2 weeks after administration is complete	No later than 2 weeks after administration is complete	No later than 2 weeks after administration is complete
Coding	4.09	Initial sample of scripts for pre-coding meeting 1 (fixed date)	<p><b>The Supplier must ensure an initial sample of scripts, at least one hundred scripts per test version, is made available on the first day of the pre-coding window.</b></p> <p>(For details see 1.c Functional Requirements - Pre - coding)</p>	<b>11-May-26</b>	<b>N/A</b>	<b>11-May-26</b>	<b>N/A</b>
Coding	4.10	Pre-coding meeting 1 (fixed date)	<p><b>The supplier must organise and manage the pre-coding meeting 1 with supervisory coders and STA for the required number of days within the PCM1 window. The Supplier must</b></p>	<b>12-14 May-26</b>	<b>07-08 Apr-26</b>	<b>11-12 May-26</b>	<b>N/A</b>

Deliverable and Output category	Ref #	Deliverable/ Output	Milestone	KS1 TPT	KS2 TPT anchors only	KS2 TPT	KS2 IVT
			<p>ensure that all outputs are achieved for this meeting.</p> <p>(For details see:</p> <ul style="list-style-type: none"> <li>1.c Functional Requirements - Pre-coding meeting 1</li> <li>Appendix C - Coding information spreadsheet for 2025)</li> </ul>				
Data	5.01b	Electronic delivery of pupil data (interim - full)	<p>The Supplier must securely transfer interim pupil data to STA for all tests in a format agreed with STA. An example of a pupil data specification is provided by STA in Appendix B.</p>	12-May-26 by 10am	12-May-26 by 10 am	12-May-26 by 10am	30-Jun-26 by 10am
Coding	4.11	<p>(fixed date) Pre-coding meeting 2</p> <p>(fixed date)</p>	<p>The supplier must organise and manage the pre-coding meeting 2 with Supervisory coders and STA for the required number of days within the PCM2 window. The Supplier must ensure that all outputs are achieved for this meeting.</p>	01-05 Jun-26	N/A	15-19 Jun-26	N/A
Project Management	1.10g	Management information reports – pre-coding progress	<p>(For details see 1.c Functional Requirements - Pre-coding meeting 2)</p> <p>The Supplier must report on the progress of pre-coding.</p>	Daily during the pre-coding windows	N/A	Daily during the pre-coding windows	N/A
Data	5.02	Data capture of questionnaires	<p>The Supplier must provide full data capture of all responses from the school and administrator questionnaires and provide to STA in an electronic file format to be agreed with STA.</p> <p>The outcomes from the analysis of the questionnaires must be provided in a spreadsheet formatted as per STA instructions.</p>	05-Jun-26	05-Jun-26	05-Jun-26	10-Jul-26
Data	STA5e	Data Specification (final)	<p>(See Appendix B for an example questionnaire analysis template.)</p> <p>STA will provide the Supplier with a final data specification. The exact dates will be discussed at the beginning of the project.</p>	TBC at start-up	TBC at start-up	TBC at start-up	TBC at start-up

Deliverable and Output category	Ref #	Deliverable/ Output	Milestone	KS1 TPT	KS2 TPT anchors only	KS2 TPT	KS2 IVT
Coding	4.12	Allocation of tests to non-supervisory coders	The Supplier must provide an assurance statement detailing the allocation of tests to non-supervisory coders.	anticipate mid Jun-26 No later than 2 weeks before coder training event	anticipate late Apr-26 No later than 2 weeks before coder training event	anticipate early Jul-26 No later than 2 weeks before coder training event	anticipate early Aug-26 N/A
Coding	STA4e	Final coding frames (TPT)	STA will provide final, signed-off coding frames for the Supplier to print for coder training.	TBC at start-up	N/A	TBC at start-up	N/A
Coding	4.13	Training materials for all coders (TPT)	The Supplier must print and collate all materials, following pre-coding that will be required for the delivery of coder training allowing time for STA to review and approve.  The Supplier must provide any training materials required for administrative aspects of their work as well as any materials required for OSC training (if required).  (For details see 'Coding materials' tabs in the Appendix C Trialling Information Spreadsheet)	Week before coder training begins	Week before coder training begins	Week before coder training begins	N/A
Coding	STA4f	Lead coder report template (TPT)	STA will provide a template for supervisory coders to use to complete their coding reports.	TBC at start-up	TBC at start-up	TBC at start-up	N/A
Coding	STA4g	Coding frames (IVT)	(See 1c Functional Requirements - 4a.02_TPT Recruiting and contracting supervisory coders - specific expectations) STA will provide draft coding frames for the Supplier to print for coder training and coding.	Anticipate mid Jul-26	Anticipate early Apr-26	Anticipate early May-26	Week before coder training begins
Coding	4.14	Training materials for all coders (IVT)	The Supplier must print and collate all materials, provided by STA, that will be required for the delivery of coder training throughout the coding window.	N/A	N/A	N/A	Week before coder training begins
Coding	4.15	Training of non-supervisory coders (OSC)	(For details see 'Coding materials' tab in the Appendix C Trialling Information Spreadsheet) The Supplier must ensure that all appropriate coder training is completed.  Coder training normally happens on the first one or two days of the coding window (depending on	N/A	27-Apr-26	06-07 Jul-26*	N/A
						*1 day for maths &	

Deliverable and Output category	Ref #	Deliverable/ Output	Milestone	KS1 TPT	KS2 TPT anchors only	KS2 TPT	KS2 IVT
			the subject).			GPS, 2 days for English reading	
			The Supplier must also ensure that all appropriate OSC coder training is completed on the training day.				
			(For details see 1.c Functional Requirements - Coder training requirements)				
Coding	4.16	Training of non-supervisory coders (OSC) - assurance	The supplier must provide written assurance that all appropriate training has been completed.	N/A	27-Apr-26	07-Jul-26	N/A
Coding	4.17	Training of non-supervisory coders (TPT paper-based panel event)	The Supplier must ensure that all appropriate coder training is completed.	22-Jun-26	N/A	N/A	N/A
			Coder training normally happens on the first day of the paper-based coding event.				
			(For details see 1.c Functional Requirements - Coder training requirements)				
Coding	4.18	Training of non-supervisory coders (TPT paper-based panel event) - assurance	The supplier must provide written assurance that all appropriate training has been completed.	22-Jun-26	N/A	N/A	N/A
Coding	4.19	Training of senior coders (IVT paper-based panel event)	The Supplier must work with the TDRs to ensure that all appropriate coding training is completed on time.	N/A	N/A	N/A	Throughout coding window
			(For details see 1.c Functional Requirements - Coder training requirements)				
Coding	4.20	Coding window (fixed dates)	The Supplier must ensure that all coding is completed within the window specified by STA.	23-26 Jun-26	28-Apr-26 to 08-May-26	07-17 Jul-26	03-14 Aug-26
			(For details see 1.c Functional Requirements - Coding event)				
Project Management	1.10h	Management information reports – coding progress	The Supplier must report on the progress of coding.	Twice daily during the coding window	Daily during the OSC coding window	Daily during the OSC coding window	Daily during the coding window

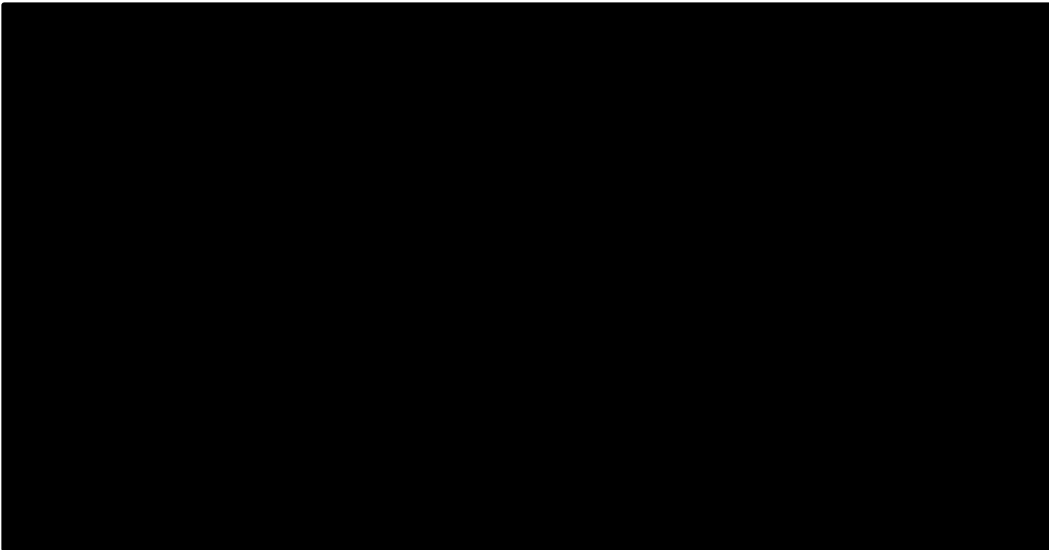
Deliverable and Output category	Ref #	Deliverable/ Output	Milestone	KS1 TPT	KS2 TPT anchors only	KS2 TPT	KS2 IVT
Project Management	1.10i	Management information reports – progress of standardisation and/or benchmarking	The Supplier must report on the progress of standardisation and/or benchmarking progress.	Twice daily during the coding window	Daily during the OSC coding window	Daily during the OSC coding window	N/A
Project Management	1.10j	Management information reports – progress of scanning / reconciliation	The Supplier must report on the progress of scanning / reconciliation	Daily during the relevant project phase	Daily during the relevant project phase	Daily during the relevant project phase	Daily during the relevant project phase
Coding	4.21	Coding assurance	The Supplier must provide a written statement confirming that all the activities are complete.	29-Jun-26	11-May-26	20-Jul-26	17-Aug-26
Coding	4.22	Coder coding quality assurance - data capture	The Supplier must capture coding quality assurance data, for all coders for on-going coding quality assurance.	Throughout the coding window	Throughout the coding window	Throughout the coding window	Throughout the coding window
Coding	4.23	Coder coding quality assurance - data outputs	The Supplier must provide the coding quality assurance data in an electronic file format.  The type of QA data to be provided will depend on the coding solution and will need to be agreed with STA prior to the event. Suppliers will need to clearly outline their intention with respect to QA in their bid.	TBC at start-up	TBC at start-up	TBC at start-up	TBC at start-up
Coding	4.24	Data capture of responses highlighted by coders	The Supplier must capture data on the responses highlighted or flagged by coders during coding and deliver to STA in the format agreed.	No later than 2 weeks following coding event	No later than 2 weeks following coding event	No later than 2 weeks following coding event	N/A
Coding	4.25	Coding report	Following coding, supervisory coders must produce a report and may be asked to meet/discuss this with STA. STA and the Supplier will work together to ensure this is effectively planned for and communicated.	No later than 2 weeks following coding event	No later than 2 weeks following coding event	No later than 2 weeks following coding event	N/A
Coding	4.26	Coder register	The Supplier must maintain a register of all successful and unsuccessful applicants for supervisor and non-supervisor roles. The Supplier must provide a complete copy of the final Coder Register to STA within three weeks following the coding completion deadline for the trial, to include results from supervisory QA processes.	No later than 3 weeks following coding event	No later than 3 weeks following coding event	No later than 3 weeks following coding event	No later than 3 weeks following coding event
Data	5.03	Final Data - 100% data feed of item level data, including	<b>The Supplier must securely provide 100% data feed of item level data including coded responses to STA in an electronic file format to be agreed with STA.</b>	<b>21-Jul-26 by 10am</b>	<b>28-May-26 by 10am</b>	<b>04-Aug-26 by 10am</b>	<b>08-Sep-26 by 10am</b>

Deliverable and Output category	Ref #	Deliverable/ Output	Milestone	KS1 TPT	KS2 TPT anchors only	KS2 TPT	KS2 IVT
		ing coded responses (Fixed date)	The Supplier must provide secure transfer of item level data to STA in compliance with the Data Protection Act and the requirements set out in the Framework Agreement.  (For details see sections: • IS – Information Security • DH – Data Handling)				
Data	5.01c	Electronic delivery of pupil data (final)	The Supplier must securely transfer final confirmed pupil data to STA for all tests in a format agreed with STA. An example of a pupil data specification is provided by STA in Appendix B.	21-Jul-26 by 10am	28-May-26 by 10am	04-Aug-26 by 10am	08-Sep-26 by 10am
Data	5.04	(fixed date) Handover electronic archive  (fixed date)	Electronic archive (item level scripts) must be handed over to STA on required date.  All item-level scanned script files must follow the naming convention: [yeartest]_[subject]_[componentcode]_[pupilID]_[pagenumber]  (For details see 1.c Functional Requirements - Handover of electronic archive)	No later than 21-Jul-26	No later than 28-May-26	No later than 04-Aug-26	No later than 08-Sep-26
Project Management	1.04 (c)	Equalities report - final	The Supplier must produce a final equalities report at the end of the project.  (For details see 1.c Functional Requirements - Equalities plan)	17-Aug-26	17-Aug-26  (* should be incorporated into the KS2 TPT final report)	17-Aug-26	17-Aug-26
Data	5.05	Trialling administration report	The Supplier must produce a trial administration report with the level of detail and in the format set out in the 1.c Functional Requirements section 1.17. The trial administration report should be split into three parts, A B and C: • Part A – Administration report (Word, or compatible report) • Part B – Analysis of questionnaire data (Excel, or compatible report) • Part C – Reporting on the trial test papers	18-Aug-25	18-Aug-25  (* should be incorporated into the KS2 TPT final report)	18-Aug-25	21-Sep-26

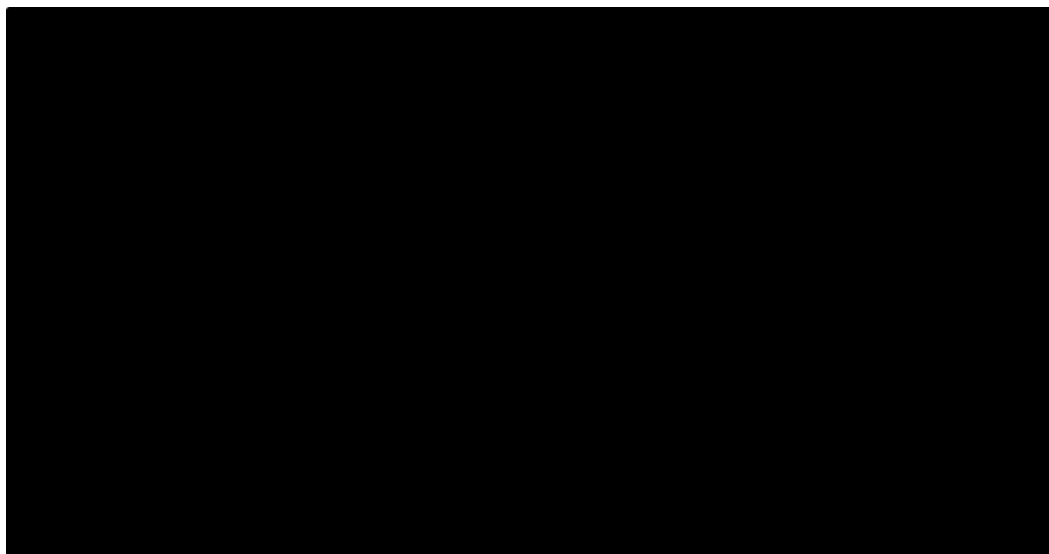
Deliverable and Output category	Ref #	Deliverable/ Output	Milestone	KS1 TPT	KS2 TPT anchors only	KS2 TPT	KS2 IVT
			(Word, or compatible report)				
Project Management	1.15	Lessons learnt meeting	<p>(For details see 1.c Functional Requirements - Trialling administration report)</p> <p>The Supplier must attend a lessons learnt meeting at the end of the project.</p> <p>The Supplier must contribute to a constructive evaluation of the project and identify areas for further improvement and innovation in future trials.</p>	w/c 07-Sep-26	<p>w/c 07-Sep-26</p> <p>* to be combined with KS2 TPT main</p>	<p>w/c 07-Sep-26</p> <p>* to be combined with KS2 TPT anchor</p>	w/c 05-Oct-26

## **Annex 2 – Charges (Call Off Schedule 05 – Pricing details)**

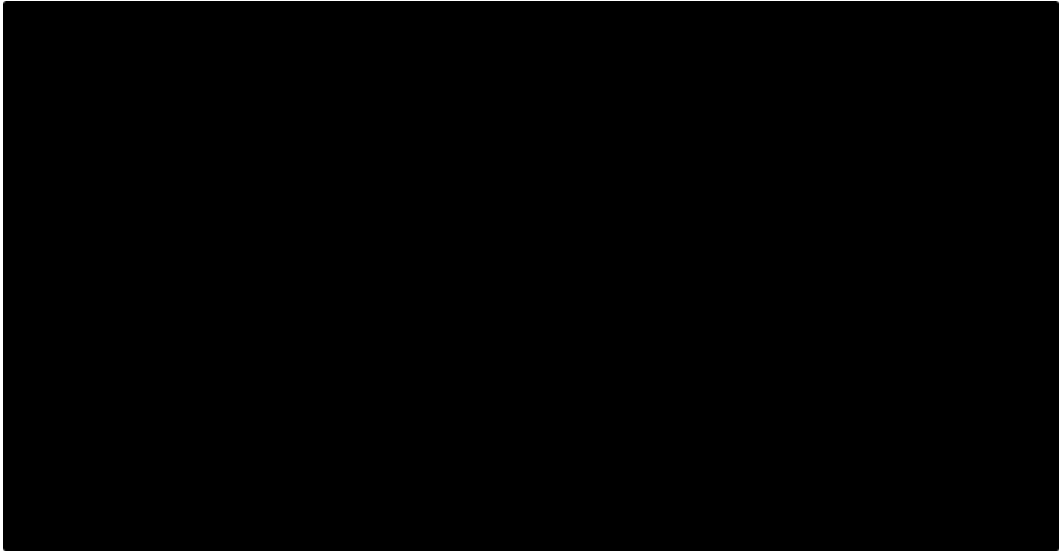
**Call Off 01 – KS1 TPT (F2F Coding) – Con\_28842**



**Call Off 02 – KS2 TPT - Con\_28843**






## Call Off 03 – IVT - Con\_28844 -



\*Note – Services are VAT exempt, VAT is not applicable

Cost breakdown - details in the embedded documents below:

    
01- ~~Appendix A\_-~~ 001-Appendix\_A\_- 001-Appendix\_A\_-  
Call-off\_01\_-\_KS1\_TPCall-off\_02\_-\_KS2\_TPCall-off\_03\_-\_IVT\_Pri

## Annex 3 – Specification of Requirement (Call Off Schedule 20 - Specifications)

### 1. Specification of Requirements

#### 1.a Context

Section subtitle	No.	KS1 TPT	KS2 TPT	KS2 IVT
Introduction	1.1	<p>This Invitation to Quote (ITQ) provides details for 3 different Call-Offs under the Trialling and Sampling Framework STA_0344.</p> <ul style="list-style-type: none"> <li>• Call-off 01 Key stage 1 (KS1) Technical Pre-test (TPT)</li> <li>• Call-off 02 Key stage 2 (KS2) Technical Pre-test (TPT)</li> <li>• Call-off 03 Key stage 2 (KS2) Item Validation trial (IVT)</li> </ul> <p>Please note this ITQ outlines the requirements of these call-offs while the Trialling and Sampling Framework details the specifications. Suppliers will need to reference both documents when completing their Bid(s).</p>		
	1.2	<p>A Technical Pre-Test (TPT) is required in the following National Curriculum subjects and will provide data on the performance of all items included in the test papers:</p> <p>KS1 mathematics</p>	<p>KS2 mathematics (anchor &amp; main), English reading (anchor &amp; main) and English grammar, punctuation and spelling (anchor &amp; main)</p>	<p>An Item Validation Trial (IVT) is required in the following National Curriculum subjects and will provide data on the performance of all items included in the test papers:</p> <p>KS2 English reading and English grammar, punctuation and spelling</p>
	1.3	<p>The Standards and Testing Agency (STA) is responsible for developing National Curriculum assessments on behalf of the Department for Education (DfE). It must ensure that all contracted agencies and consultants are aware of, and comply with, the relevant sections of the Ofqual Regulatory Framework for National assessments: National Curriculum and Early Years Foundation Stage.</p>		
Background to requirement	1.4	<p>Each contract will be project managed within the Assessment Research and Development Division at STA. The Supplier will need to interface with the Trialling Senior Project Manager, Trialling Project Manager, Head of Test Development Research, Head of Assessment Research, Data and Psychometrics, Head of Test Development Delivery and assigned STA Test Development Researchers (TDRs), Project Managers, Project Co-ordinators and Psychometricians for each subject.</p>		
Freedom of information and transparency	1.5	<p>As the executive agency of a public authority, STA is committed to open government and to meeting its legal responsibilities under the Freedom of Information Act 2000 ("FOIA"). Accordingly, Tenderers should be aware that all information submitted to a public authority may need to be disclosed by the public authority in response to a request under the FOIA and that, in addition, DfE may also decide to include certain information in the publication scheme, which it maintains under FOIA.</p>		

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1.6

STA participates fully in the Government's transparency arrangements. As such, Tenderers should be aware that:

- any contracts or agreements resulting from its procurement exercises may be published in full, subject to limited redactions in line with FOIA exemptions
- financial transactions in relation to any contracted goods or services will be published and so cannot be deemed commercially sensitive

1.7

If a Tenderer considers that any of the information included in its Tender is commercially sensitive, it should identify this information in the table below and explain a) what harm may result from disclosure if a request is received, and b) the time period applicable to that sensitivity. Tenderers should be aware that, even where they have indicated that information is commercially sensitive in certain circumstances this information may have to be released.

Section	Commercial Sensitivity	Time Period
	Staff names and information (including organisation structure and solution team structure)	Perpetual
	Methodology and processes are NFER's Intellectual Property Right (including but not limited to NFER's proposals/tenders and subsequent work, NFER's Suppliers, Register of Schools, Marker/TA details, Survey Admin System, School Portal and on-screen marking system as NFER's pre-existing Intellectual Property Right). This information if disclosed to any third party or Replacement Supplier would, or would be likely to, prejudice the commercial interests of NFER and cannot be disclosed without a potential impact on the outcome of future tenders and significant prejudice to NFER's commercial and financial interests and should be exempt from disclosure under Section 43(1) for information which is a trade secret.	Perpetual

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	Pricing including details of daily rates and other charges, invoicing and milestones or breakdown of costs	Perpetual
	NFER's Exit Plan, Security Management Plan, Transparency Reports as all will contain Commercially Sensitive information about the Supplier's systems, processes and pricing and could cause serious harm if disclosed to third parties.	Perpetual

## Scope of services required

1.8

A Technical Pre-Test (TPT) for KS1 mathematics.

Anchor items are embedded within the test booklets for mathematics.

A Technical Pre-Test (TPT) for KS2 English reading; English grammar, punctuation and spelling; and mathematics.

An Anchor Technical Pre-Test (TPT) for KS2 English reading; English grammar, punctuation and spelling; and mathematics.

The anchor tests for each subject will need to be administered early in the window. The reading anchor (RABXAT) will mostly be trialled in combination with other trial papers. As a result, any combination that involves the anchor test will have to be administered early in the window.

Please note the separate anchor tests require all the same deliverables as all other TPT subjects but to an earlier timescale.

An Item Validation Trial (IVT) for KS2 English reading and English grammar, punctuation and spelling.

The trialling must take place during the administration window specified.

(See 1.b Fixed dates on page 6 of this document, and 1.b Deliverables and outputs document).

1.9

School participation in National Curriculum Assessment trials is statutory. STA will provide the Supplier with the sample of schools to recruit.

For all trials, only one class from each school will be asked to participate in the trial. Each school will only be asked to

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participate in one of the trials in this call-off. STA will supply minimum requirements for each test combination.

The Supplier will let local authorities and multi academy trusts know of any schools participating in a trial in their area or jurisdiction.

The Supplier is responsible for managing and contacting the schools selected by the STA for participation in the trial.

1.10 The Supplier is responsible for the end-to-end process of the creation, recruitment, training and management of a pool/register of Administrators.

1.11 The Supplier is responsible for the end-to-end process of the recruitment and management of supervisory and non-supervisory Coders. STA will provide a list of the current national curriculum register of markers.

1.12 The Department is currently reviewing delivery options for KS1 TPT coding. The coding method is currently paper-based, and the option to deliver via an on-screen method is under review. For the purposes of this opportunity, the Department will publish the requirements for both paper-based and on-screen coding.

The Department will be evaluating the paper-based coding option only. The Department will also request pricing for an on-screen option, which will not form part of the evaluation. If a supplier is only able to deliver paper-based coding their bid will be evaluated.

1.13 If the winning supplier has the ability to offer on-screen coding, the Department may, at its discretion, decide to use on-screen coding instead of paper-based coding. This change will be made through the change control procedure. The table below provides the high-level requirements with respect to this specification. It outlines what aspects of the Trialling and Sampling Framework Agreement will be required for these trialling call-offs.

	KS1 TPT	KS2 TPT	KS2 IVT
Project management	✓	✓	✓
Information security	✓	✓	✓
Drawing the sample	X	X	X
Recruitment and management of schools	✓	✓	✓
Recruitment, training, payment and management of administrators	✓	✓	✓
Recruitment, training, payment and management of coders	✓	✓	✓
Collation and distribution of assessment instruments	✓	✓	✓
Administration of trial assessments	✓	✓	✓
Helpline	✓	✓	✓
Script management during coding	✓	✓	✓
Data capture	✓	✓	✓
Handling pupil background data	✓	✓	✓
Trial administration report	✓	✓	✓

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No.	KS1 TPT	KS2 TPT	KS2 IVT
	Coding (either paper based or on-screen)	✓	✓
	Printing	✓	✓
	Disseminating an incentive payment to participating schools *	X	X
	Drawing the sample (for non-statutory trials)	X	X

\*Please note - as participation in trialling is statutory, it is not appropriate to offer an incentive payment to schools

Key	
✓	Included in Trial
X	Not included in Trial

## 1.b Fixed dates

The table below explicitly highlights all the dates that are **fixed dates** for each trial. They have all been extracted from 1.b Deliverables and Outputs.

These dates have been decided by STA **for the activities shown** and are **non-negotiable**. These dates have been carefully considered. Trial-ling must ensure all test development and live marking activities dovetail to support the overall end to end process of the development of the final National Curriculum Assessments. The deliverables/outputs prefixed by 'STA' - for example, 'STA4a' - are deliverables from STA to the Supplier. These dates are provided to aid the Supplier with their planning.

No.	Deliverable/Output	KS1 TPT	KS2 TPT anchors only	KS2 TPT	KS2 IVT
STA4a	Coder recruitment register	09-Dec-25	09-Dec-25	09-Dec-25	09-Dec-25
STA2a	Sample of schools	16-Jan-26	16-Jan-26	16-Jan-26	16-Jan-26
4.02	Recruitment of supervisory, non-supervisory and senior coders - contracts award	26-Feb-26	26-Feb-26	26-Feb-26	26-Feb-26
STA6b	STA - Handover of final test booklets from STA	10-Mar-26	10-Mar-26	10-Mar-26	09-Apr-26
3.10	Test Administration window (KS2 TPT anchors should be completed in the first week where possible)	13-24 Apr-26	13-24 Apr-26	13-24 Apr-26	18-22 May-26 and 01-05 Jun-26
5.01a	Electronic delivery of pupil data (interim - partial) – by 10am	08-May-26	08-May-26	08-May-26	19-Jun-26
4.09	Initial sample of scripts for pre-coding meeting 1	11-May-26	N/A	11-May-26	N/A
4.10	Pre-coding meeting 1	12-14 May-26	07-08 Apr-26	11-12 May-26	N/A
5.01b	Electronic delivery of pupil data (interim – full) – by 10am	12-May-26	12-May-26	12-May-26	30-Jun-26
4.11	Pre-coding meeting 2	01-05 Jun-26	N/A	15-19 Jun-26	N/A
4.20	Coding window	23-26 Jun-26	28-Apr-26 to 08-May-26	07-17 Jul-26	03-14 Aug-26
5.03	Final Data feed - item level (100% of marks) - coder data – by 10am	21-Jul-26	28-May-26	04-Aug-26	08-Sep-26
5.01c	Electronic delivery of pupil data (final) – by	21-Jul-26	28-May-26	04-Aug-26	08-Sept-26

No.	Deliverable/Output	KS1 TPT	KS2 TPT an- chors only	KS2 TPT	KS2 IVT
	10am				
5.04	Handover electronic archive (item level scripts) – no later than	21-Jul-26	28-May-26	04-Aug-26	08-Sep-26

- Trialling Call Offs 01-02\_TPT Requirements



- Trialling Call Off 03\_IVT Requirements



Annex 4 - Bidder’s Submission (Call Off Schedule 04 – Tender)

○ Qualification Envelope Response

 itt\_3642\_Analysis -  
NFER.xlsx

○ Technical Envelope Response

 Technical Responses - Call Off 03 - NFER.zip       Technical Responses - Call Off 01 - NFER.zip

 Technical Responses - Call Off 02 - NFER.zip

○ Commercial Envelope Response

    
001-Appendix A...C 001-Appendix A...C 001-Appendix A...C  
all-off\_02\_-\_KS2\_TPT\_all-off\_01\_-\_KS1\_TPT\_all-off\_05\_-\_IVT\_Pricin