

# Provision of Item Writing Services - Key Stage 1 English Reading Call-Off Contract

<b>Item Writing Framework Agreement – STA 0128</b>	
<b>Call-Off Contract No: STA-0128/22/01</b>	
<b>Title: Provision of Item Writing Services for Key Stage 1 English Reading Work Package 1</b>	
<b>Supplier: National Foundation for Educational Research (NFER)</b>	

**Pursuant to the terms of the Item Writing Test Framework Agreement (STA 0128):**

<b>Service Commencement Date:</b>	11 March 2019
<b>Call-Off Contract End Date:</b>	4 February 2020
<b>Call-Off Contract Value:</b>	REDACTED
<b>Relationship Manager for Department for Education:</b>	REDACTED
<b>Contract Manager for the Department for Education:</b>	REDACTED
<b>Relationship Manager for the Supplier:</b>	REDACTED

## 1. Background

This call-off contract is for the provision of item writing services for Key Stage 1 English Reading Work Package 1, including the drafting of potential items and their mark schemes, ready for formal trialling.

## 2. Functional Requirements

<b>Assessment type:</b>	National curriculum assessment – for pupils at the end of key stage 1
<b>Item Development and Design</b>	The number of marks stated for the work package outlined below is the total number of marks which must be provided at final handover.

	Supplier will need to ensure sufficient items are created to allow for any losses during the process.
<b>Item Writing requirements</b>	<p>The items will be used in tests which assess the (2014) national curriculum programme of study for key stage 1 English.</p> <p><b>Final test format</b></p> <p>There are two test components: One integrated reading and answer booklet and one separate reading booklet with associated reading answer booklet.</p> <p><i>Reading booklet 1</i> comprises 2-3 texts with questions interspersed. The total word count will be approximately 400 – 700 words. This component contains 20 marks. Questions in this booklet are based on the sections of the text on the same or the facing page. Texts in reading booklet 1 should focus on the low to middle end of reading difficulty for pupils at the end of year 2. We would expect to have 2 texts, a fiction text and a non-fiction text, in the first booklet.</p> <p><i>Reading booklet 2</i> comprises 2-3 texts, totalling approximately 800 - 1100 words. The associated reading answer booklet will contain 20 marks. Texts for reading booklet 2 should focus on the middle to upper end of reading difficulty for pupils at the end of year 2.</p> <p>Links to past papers and the test specification can be found in Annex F.</p> <p><b>Work package 1</b></p> <ul style="list-style-type: none"> <li>• Booklet 1 – Three fiction texts and one non-fiction text</li> <li>• Booklet 2 – Two fiction texts and one non-fiction text</li> </ul> <p>The items will be based on a stimulus reading text. The supplier will be required to source stand-alone texts assessing English reading to match the cognitive demand ratings as described in the test framework for 2016 for complexity and item response. These texts must be appropriate for a national cohort of pupils in year 2, free from sensitive or controversial subject matter and likely to be appealing or engaging to pupils at the end of key stage 1. They should provide a rich source for eliciting items across the content and cognitive domains.</p> <p>Items for each text must be presented in two separate item sets (to match the two versions of test booklets that will be taken to IVT). There should be no items appearing in both booklets and no enemies (questions that would not appear together in a final test paper) within each individual item set. Additionally, the number of enemies must be</p>

kept to a minimum – that is no more than 3 questions in each set that have an enemy in the other set.

Supplier should specify which of their texts are intended for booklet 1 and which are intended for booklet 2.

Please check the content of previous live tests (see link in Annex F of ITQ) to avoid submitting texts with similar themes.

### **General guidelines for the selection of fiction texts**

Across all texts we would like to see both male and female protagonists represented but would like there to be slightly more texts which have female protagonists. Please avoid subjects that may advantage certain children or that some may be more familiar with than others.

Currently, we would welcome more contemporary fiction texts rather than extracts from historical fiction texts. The item writing guidance in Annex E of the ITQ contains lists of subjects that we wish to avoid.

The range of texts must reflect the diversity of life in contemporary British society and should be recognisable to the diverse cohort of pupils from across the country who will be sitting the tests. As such, we ask that item writers look for diverse narrative texts that avoid racial or cultural stereotyping.

The suite of texts provided should cover a range of character background and cultural experience, such that no group of children is advantaged or disadvantaged by familiarity with the context, with particular thought given to representativeness of gender, ethnicity and socio-economic background within the texts.

Please refer to the KS1 item writing guidance in Annex E of the ITQ for further details.

### **General guidelines for the selection of non-fiction texts**

Non-fiction texts should feel authentic with a clear purpose and audience. Content should be engaging and accessible for the cohort and should not advantage those with prior knowledge of the topic. Information contained within the non-fiction texts must be checked for factual accuracy.

### Items

Total final requirements for each text will be approximately as per the tables below.

<b>Booklet 1</b>	<b>Per text</b>
<b>Total word count</b>	100 - 250
<b>Total marks</b>	20*
<b>Required marks for making inferences (1d), giving the meaning of vocabulary in context (1a), sequencing events (1c) and prediction (1e)</b>	Approximately 50% incorporating all three of these areas of the content domain  (we would expect the bulk of the marks to be made up of 1d making inferences items)
<b>Required marks for retrieval (1b) items</b>	Approximately 50%
<b>1 mark items</b>	100%
<b>2 mark items</b>	0%
<b>Open response</b>	70 – 80%
<b>Closed response</b>	20 – 30%

\*For booklet 1 texts, STA requires a minimum of 4 items per page of the reading text.

	<b>Booklet 2</b>	<b>Per text</b>
	<b>Total word count (booklet 2 texts)</b>	250 - 500
	<b>Total marks</b>	20
	<b>Required marks for making inferences (1d), giving the meaning of vocabulary in context (1a), sequencing events (1c) and prediction (1e)</b>	approximately 50%
	<b>Required marks for retrieval (1b) items</b>	approximately 50%
	<b>1 mark items</b>	14 - 18 marks
	<b>2 mark items</b>	6 - 12 marks
	<b>Open response</b>	70 – 80%
	<b>Closed response</b>	20 – 30%
	<p>NOTE: 2 mark items which are open response should include a variety of response requirements, i.e. items where two pieces of information / inferences are required with two numbered answer lines and items where pupils have to organise a longer response.</p> <p>NOTE: Any items created additionally to the figures specified in this specification of requirements under this contract, which are intrinsically linked to the selected texts, must also be presented at Interim Handover.</p>	
<b>Mark schemes</b>	<p>Mark schemes must be developed for all items.</p> <p>The mark schemes must provide sufficient and clear guidance for teachers and markers to:</p> <ul style="list-style-type: none"> <li>• allow marks to be allocated reliably, with consistency and accuracy</li> <li>• enable marking to be manageable</li> <li>• enable the marking of the tests to be effectively standardised</li> <li>• have a principle to define what is correct</li> <li>• include examples of responses that illustrate the range of correct responses and possible incorrect or insufficient responses. Ideally, mark scheme exemplars should be drawn from informal trialling, where the items have been trialled.</li> </ul>	

	<p>The mark schemes should:</p> <ul style="list-style-type: none"> <li>• Clearly and succinctly communicate the marking principles for creditworthy and possible non-creditworthy responses to each item</li> <li>• Be straightforward to apply and recognise and reward pupils' responses appropriately</li> </ul>
<b>Item and mark scheme design</b>	<p>Prior to Interim Handover, items and mark schemes should NOT be presented in InDesign format, with Microsoft Word (or equivalent) being preferred. At Interim Handover, 10% of the items must be presented in InDesign.</p> <p>From Interim Handover onwards, the items must be designed, using Adobe InDesign (STA use Adobe Creative Cloud or equivalent subject to prior agreement), such that they match as closely as possible the style of the supplied key stage 2 tests in relation to all design elements including font, font size, spacing, diagram style and illustration style. Templates will be provided at the pre-trialling meeting, and the requirements of the Design Specification. It is not expected that materials used at informal trialling will be produced in design templates when being informally trialled.</p> <p>Mark schemes should be submitted in Microsoft Word 2016 (or compatible subject to prior agreement). STA will provide a template for these mark schemes. Mark schemes must be presented in this format at pre-informal trialling, Interim and Final Handover (see below). All content in mark schemes handed over to STA should be fully editable in Microsoft Word 2016 (or compatible subject to prior agreement) with the exception of any complex artwork or diagrams which should be embedded in the appropriate place in the document. The mark schemes should also match the style and layout of the supplied template.</p>
<b>Artwork, texts and other external materials</b>	<p><b>Written test item texts, artwork or data</b></p> <p>All graphics that are fundamental to the questions and mark schemes (e.g. data sources, diagrams, photographs) must be produced and supplied at Final Handover.</p> <p>The Supplier must provide a statement at final handover to confirm that materials were developed by the Supplier and that IPR is assigned to the DfE in handover. Where handover includes externally sourced or commissioned materials, further information must be provided as described below.</p>

	<p>Where texts, artwork or data <b>have been commissioned</b> to an external, third-party organisation, please include the original material,</p> <ul style="list-style-type: none"> <li>• contact details for the creator of the material</li> <li>• a statement confirming assignment of the intellectual property rights (“IPR”) in the material from the creator to DfE.</li> </ul> <p>Where there is a <b>third party owner</b> of any materials, it should be referenced as described below.</p> <p><b>Referencing source materials and artwork</b></p> <p>Any materials using third-party externally sourced <b>texts, artwork or data</b> need to be fully referenced; including</p> <ul style="list-style-type: none"> <li>• title,</li> <li>• name of copyright owner,</li> <li>• name of the author/editor/creator,</li> <li>• details of the edition, publisher</li> <li>• page/location of the material within the source.</li> </ul> <p>If sourced from the web, please provide</p> <ul style="list-style-type: none"> <li>• a print out of the original website, showing the relevant artwork or data</li> <li>• full website address</li> <li>• date page was printed / downloaded</li> <li>• copyright / IPR details from the website.</li> </ul>
<b>Item classification</b>	<p>The Supplier must accurately classify all items according to the fields on the item classification spreadsheet, and present the item information on the spreadsheet template supplied. An example spreadsheet is provided in Annex B and final version will be provided to successful supplier(s) at or before the start-up meeting. This spreadsheet must be finalised and included with the materials presented at Final Handover (see below).</p>
<b>Quality Assurance</b>	<p>Accuracy checks must be carried out on all the information texts submitted. This check must be carried out by a researcher / expert in the field of the subject matter.</p>

	<p>Readability checks are also required on individual texts. The checks required are:</p> <ul style="list-style-type: none"> <li>• Word count</li> <li>• Flesch-Kincaid</li> <li>• New Dale-Chall</li> <li>• New Fog Count</li> <li>• Spache</li> <li>• SMOG</li> </ul> <p>The results of these checks must be reported in writing to STA. In reporting of the readability scores, please detail any dependencies or assumptions made in calculating the scores. Please also include details of the methodology used, and why that method was chosen.</p> <p>At the text selection stage, a report should be provided to STA detailing the feedback on the texts from the required school visits. This report should be provided in writing to STA and may incorporate details of the accuracy check and the readability checks mentioned above.</p>
<p><b>Informal Trialling</b></p>	<p>The primary aim of informal trialling is to aid development of items and mark scheme development. Supplier must ensure that as far as possible those individuals, or the key individual, who have devised the items (the Item Writer) conduct trialling personally so they get first hand feedback on the language being used, area being assessed, and the interpretation and understanding of the items by pupils and teachers<sup>1</sup>. Whether or not a pupil answers correctly is of secondary concern, rather that they understand what is being asked of them regardless of their answer.</p> <p>For English reading, a minimum of 20% of the items associated with each text must be informally trialled with at least 15 children.</p> <p>Pupils should be of an appropriate age and overall should show the range of abilities expected at the end of key stage 2. The items should be discussed with pupils in small groups of 4-6 pupils.</p> <p>Supplier should provide details of the volume of items they will be able to trial with their Item Writers conducting the trialling and any interviews, and provide detail of their trialling model to ensure items and mark</p>

<sup>1</sup> People trialling items must have prior knowledge, preferably through integral involvement in origination, but minimally through having reviewed and discussed the materials with the Item Writers.



	<p>schemes are improved or validated as a result of the trial. Supplier should also provide the following costs:</p> <ul style="list-style-type: none"> <li>• Informal trialling – fixed costs</li> <li>• Informal trialling – variable costs based on trialling all texts and 20% of the items written for this contract.</li> </ul> <p>There is <b>no requirement to collect quantitative data</b> as a result of this trial as the nature of the samples will not be representative. Any feedback from the trial will consist of qualitative data and evidence only.</p> <p>STA staff may wish to accompany the agency on a small number of visits to schools to observe so dates and locations of schools where trialling is taking place are to be provided to STA at least two weeks in advance of the first trial taking place.</p> <p>Informal trialling must be completed in order for findings to feed into the interim handover deadlines.</p> <p>Expected outputs from the trials should be by exception only and should include:</p> <ul style="list-style-type: none"> <li>• Child-level feedback from discussion in small groups with the administrator on their experience of the items and their level of understanding</li> <li>• Teacher feedback on the same</li> <li>• Detailed amendments to items and mark schemes as a result of the trials</li> </ul> <p>Qualitative feedback from the informal trial will be presented at the interim handover meeting within the Microsoft Word version of the mark scheme.</p>
<b>Interim Handover</b>	<p>Interim Handover must occur no later than <b>week commencing 11 November 2019</b>.</p> <p>(as indicated in table in section titled “Project Deliverables/Outputs and Critical Steps” within the ITQ).</p> <p>To provide copies of all materials – including amendments following informal trialling – that are proposed to go forward to final handover. Where final versions are not available, a sketched outline or layout of any proposed illustrations or graphics (if you choose to include artwork) should be provided, or a suitable placeholder graphic.</p> <p>The following materials must be sent to STA:</p>

	<ul style="list-style-type: none"> <li>• InDesign files (STA uses CC 2014 or equivalent subject to prior agreement) of at least 10% of the test items in order for STA to check their compliance with the Design Specification and software compatibility. For this purpose, the files need to be submitted according to the specification and the template (provided at the start-up meetings) but do not need to be the latest or final versions of the files. Remaining items should be supplied in InDesign or MS Word (or compatible) format.</li> <li>• Microsoft Word 2016 (or compatible subject to prior agreement) files for all mark schemes</li> <li>• PDF versions of all items and mark schemes – the PDF of items and mark schemes should be compiled into two files only; one containing all test items/questions and the other containing the mark schemes.</li> <li>• Informal trialling comments integrated into the mark schemes for each item</li> <li>• Item classification spreadsheet in Microsoft Excel 2016 (or compatible), with summary table(s) showing coverage across Attainment targets and levels and any other information as indicated by the supplied template (Annex B within the ITQ)</li> <li>• For the materials being presented, provide a summary table showing coverage across the content and cognitive domains in all subjects and coverage across the assessable elements in English Reading.</li> </ul> <p>As a result of informal trialling, item writing agencies will need to send to STA the following documents prior to the interim handover meeting:</p> <ul style="list-style-type: none"> <li>• Two clean hard copies of all the Informal Trialling booklets and mark schemes / coding frames.</li> <li>• A set of materials containing the suggested mark-ups or amendments as a result of the informal trialling and any other items that were not trialled</li> <li>• A report listing the points specified and other feedback obtained during informal trialling.</li> </ul> <p>Any items created additionally to the figures specified in this specification of requirements under this contract, which are intrinsically linked to the selected texts, should also be presented at Interim Handover.</p>
<b>Interim Review</b>	STA will review the materials submitted at Interim Handover. A meeting will be held between STA and the item writers to review those materials and outputs from informal trialling.

	<p>Any further changes to materials will be agreed at this meeting. The Supplier will complete these and any other agreed amendments prior to final handover. Where a text has not generated sufficient items to go forward, the contract will be varied accordingly.</p> <p>Feedback will be provided at the Interim Review meeting on adherence to the Design Specification for those items submitted in InDesign format. As a result of this feedback, the Supplier may be required to provide an additional set of all materials prior to final handover to ensure compliance with the Design Specification.</p> <p>After interim review, item writing agencies must ensure that they have sufficient items to meet the final handover requirements. Replacement items at this stage of the process must be shown to STA for approval before being included in the final handover materials.</p>
<b>Final Handover</b>	<p>Final Handover Acceptance Meeting must occur no later than <b>the week commencing 20 January 2020</b>.</p> <p>The following materials must be handed over by the Final Handover Meeting:</p> <ul style="list-style-type: none"> <li>• <b>30 hard copies</b> of the following: <ul style="list-style-type: none"> <li>○ All texts, combined items and mark schemes.</li> </ul> </li> <li>• Electronic copies of the following: <ul style="list-style-type: none"> <li>○ Classification spreadsheets classifying items in terms of the attainment targets item type of each item, including a table summarising the number of marks assessing each content domain reference, and other information using the template supplied.</li> <li>○ Copyright statement (including all formal documentation for copyright transfer).</li> <li>○ A single Adobe InDesign (STA uses Adobe Creative Cloud or equivalent subject to prior agreement) file for each individual test item with associated links and files.</li> <li>○ Microsoft Word 2016 (or compatible subject to prior agreement) files for the mark schemes, split into two item sets.</li> <li>○ Individual PDF files for each question</li> <li>○ A combined PDF of all items (by text) and another combined Word document of all mark schemes (by text).</li> <li>○ A reference document that details the sources of any data and artwork/images used in the test items</li> <li>○ All artwork/images used in the test items as unflattened files with all layers intact within the image file where applicable. Please ask for clarification on specific file types which are acceptable.</li> </ul> </li> </ul>

	<ul style="list-style-type: none"> <li>○ For the materials being presented, provide a summary table showing coverage across the content and cognitive domains in all subjects and coverage across the assessable elements in English Reading.</li> <li>○ a mark-up for each text, mapping the questions to the specific areas of text being assessed.</li> </ul> <ul style="list-style-type: none"> <li>• Assignments and/or licences of IPR in the commissioned and other third party works to be completed by the Final Handover Date – as stated in the PQQ and the Contract, and all documentation relating to IPR.</li> </ul> <p>In addition to the handover of the above materials, the purpose of the Final Handover meeting (which will last at least one full working day) is to discuss the items and the rationale for all amends made. The meeting will be chaired by STA and take place in STA offices in Coventry or London.</p>
<b>Acceptance of Final Handover</b>	<p>Following Final Handover, STA will check the provided materials. If any errors are found, all materials will be returned to the supplier for a full check and for amendments to be carried out. An error free set of materials must be returned to STA no later than two weeks after the Final Handover Date.</p>

### 3. Required Service Elements

The table below sets out the Service Elements and Deliverables the Supplier shall provide under this Call-Off Contract.

No	Deliverables/Outputs	Acceptance Criteria	Due Date
1	<p><b>Start-Up Meeting – FIXED DATE</b></p> <p>Supplier will provide:</p> <ul style="list-style-type: none"> <li>Detailed plan for item and mark scheme production for review and joint sign-off, including proposed dates for any meetings outlined in this specification</li> <li>Detailed plan for when checkpoints will be held for review and joint sign-off</li> <li>Detailed project risk and issue log (Risk Log) for review and joint sign-off</li> <li>Project Initiation Document (PID)</li> </ul> <p>STA will provide:</p> <ul style="list-style-type: none"> <li>Clarification of any item writing requirements</li> <li>Guidance on criteria to consider when selecting quality texts will be discussed – information is provided in the ITQ.</li> </ul>	Project Director / Project manager (or equivalent) attend the Start-Up Meeting and provision of listed documents by agreed date.	<b>March 2019</b>
2a	<p><b>Text searching</b></p> <p>Submit 200% of the required texts from which the final texts will be selected for further development and item writing.</p> <ul style="list-style-type: none"> <li>The text selection guidance must be used when deciding which texts to submit</li> <li>Provide assurance of how the texts meet the criteria for fiction/non-fiction texts set out in the item writing guidance (see Annex E of the ITQ).</li> <li>STA will review the texts in light of the guidance and decide which are appropriate to take forward to text trialling stage.</li> <li>STA reserves the right to reject any texts which are not of sufficient quality or do not conform to the guidance provided</li> </ul>	STA will confirm in writing to the project director/project manager (or equivalent) which texts are suitable to take forward to text trialling.	<p><b>Non-fiction text topics shared with STA:</b></p> <p><b>March 2019</b> (non-contractual date)</p> <p><b>Text submission: April 2019</b></p>

No	Deliverables/Outputs	Acceptance Criteria	Due Date
			<b>STA selection of texts:</b>  <b>May 2019</b>
2b	<p><b>Text trialling</b></p> <p>Provide assurance that the texts submitted are of sufficient quality to use in a national curriculum test.</p> <p>This assurance will be provided by supplier taking the following steps:</p> <ul style="list-style-type: none"> <li>• Gathering enjoyment ratings for all of the proposed texts from 150 pupils of the target age group from at least 5 schools, which must cover a range of geographical areas and attainment records. A small number of other questions related to pupil reactions to the texts may also be asked; these will be detailed at the start up meeting.</li> <li>• A report based on the findings of the school visit will then be compiled and submitted to STA as part of the text submission process. This report should focus on a discussion with the pupils about whether they enjoyed the texts and why and what they did or did not enjoy specifically (e.g. language, content, etc.)</li> <li>• The report should include any suggested changes in light of the text trial for non-fiction texts so that these can be presented to the text selection teacher panel.</li> <li>• The report should include any suggested edits in light of the text trial for fiction texts so that these can be presented to the text selection teacher panel. – please see the item writing guidance in Annex E of the ITQ for guidance on editing of fiction texts.</li> <li>• Provide further assurance that texts have the potential to generate sufficient items for coverage of the curriculum and with limited ‘enemy’</li> </ul>	<p>Project Director / Project manager (or equivalent) attend the Text Selection Meeting and provide the texts, the report on findings from school visits and potential questions a week in advance for consideration.</p> <p>Number of good quality texts provided meets the specification of requirements.</p>	<p><b>May –June 2019</b></p> <p><b>Text and trialling report submission:</b>   <b>June 2019</b></p>

No	Deliverables/Outputs	Acceptance Criteria	Due Date
	<p>items. Texts should be highlighted and annotated to demonstrate which sections provide the potential for questions.</p> <ul style="list-style-type: none"> <li>• Readability checks are also required on individual texts. The checks required are: Word count, Flesch-Kincaid, New Dale-Chall, New Fog Count, Spache, SMOG</li> </ul> <p>Proposed texts highlighted and annotated for potential items to be submitted to STA at least one week in advance of the text selection meeting.</p> <p>NOTE: For narrative texts, the complete book must be read. The Supplier must provide assurance that this has been done by the text selection meeting. A summary of any non-age appropriate themes from the wider book should be provided to STA. STA will provide further details at the start up meeting.</p>		
2c	<p><b>Text selection teacher panel</b></p> <p>STA will hold an expert review panel on submitted texts to gather the views of teachers at this early stage of development. Teachers will also be asked whether they feel that the content / subject matter of the texts is appropriate for Key Stage 1 children who will be sitting the test.</p> <p>This will form part of the evidence base on which STA will decide which texts to take forward to the item writing phase.</p>	Number of good quality texts provided meets the specification of requirements.	<b>July 2019</b>
3	<b>Text Selection Meeting (including checkpoint: report submitted 4 July 2019)</b>	Required number of texts of sufficient quality submitted and selected	<b>July 2019</b>

No	Deliverables/Outputs	Acceptance Criteria	Due Date
	<p>Attend meeting to discuss and explain text selection choices and agree which texts will be taken forward into development.</p> <p>The guidance in Annex E of the ITQ should be referred to when explaining the suitability of the materials.</p> <p>For narrative texts, once these are chosen, after the text selection meeting a copy of the complete book should also be provided to STA.</p> <p>If there are not sufficient texts that are deemed to be fit for purpose to go forward to item writing stage, the contract can be varied accordingly.</p>	<p>STA Test Development Researchers to attend and present collated feedback from TDRs and curriculum reviewers.</p>	
4	<p><b>Checkpoint Meetings and Management Information</b></p> <p>To attend regular checkpoint meetings at least once a month, although they may need to be more frequent at some stages of the project. These meetings may be held as telephone conference calls. Checkpoint reports to be submitted to STA two working days in advance of each Checkpoint meeting.</p>	<p>Project manager (or equivalent) attends each Checkpoint meeting on agreed date and submission of Checkpoint report two working days in advance of each checkpoint meeting.</p>	<p><b>April 2019</b>  <b>June 2019</b>  <b>July 2019</b>  <b>August 2019</b>  <b>September 2019</b>  <b>October 2019</b>  <b>November 2019</b>  <b>December 2019</b>  <b>January 2020</b></p>
5	<p><b>Item Writing, Internal Review and Handover of Materials for the Pre-trial Meeting</b></p> <p>All items and draft mark schemes should be written at this stage and draft cognitive and content domain references assigned.</p>	<p>Sufficient high-quality materials submitted to be able to handover the required material at the end of the project and allow for some</p>	<p>July – August 2019</p> <p><b>Submission of materials:</b></p>



No	Deliverables/Outputs	Acceptance Criteria	Due Date
	<p>Following text selection, all texts and items should be internally reviewed.</p> <p>At least 20% of items should be flagged as suggestions for informal trialling.</p> <p>All materials written for the project to be handed to STA in both electronic and hard copy versions.</p> <p>There is an expectation that the item writing agency (IWA) write more items than needed because of attrition following review and informal trialling.</p>	attrition throughout the process.	<b>August 2019</b>
6	<p><b>Pre-Informal Trial Meeting</b></p> <p>To agree which items need to be informally trialled and to agree any amendments required to items prior to trialling taking place. Feedback is provided by STA on all items at this stage. If items are rejected as a result of trialling or STA's review comments, the supplier must ensure that there are alternative, viable questions that have been presented and discussed at the pre-trial meeting.</p> <p>Suppliers must seek to limit the number of enemy items (see item writing requirements section for each key stage).</p> <p>STA will specify the format and content for reporting informal trialling outcomes.</p> <p>The outcome of this meeting will determine the final cost for informal trialling.</p> <p>This meeting may be via telephone, or face-to-face. Format to be agreed at the start-up meeting.</p>	<p>Project manager (or equivalent) attends meeting on agreed date.</p> <p>STA Test Development Researchers to attend and present collated feedback from TDRs and curriculum reviewers.</p>	<b>September 2019</b>

No	Deliverables/Outputs	Acceptance Criteria	Due Date
	<p>Design templates and guidance documents will be available no later than this stage.</p> <p>The Supplier should note any amendments and STA will confirm arrangements for sharing amendments and actions to be taken after the meeting.</p>		
7	<p><b>Informal Trialling – Critical Step</b></p> <p>Items amended as per Pre-Informal Trial Meeting(s) and agreed items informally trialled with specified number of pupils.</p> <p>Handover of two hardcopies of all Informal Trialling booklets and mark schemes/coding frames.</p>	<p>Required amendments completed before trialling.</p> <p>100% of agreed items trialled with specified number of schools and pupils. (Plus any new items developed since the pre-informal trial meeting)</p> <p>STA are notified of trialling locations two weeks before the start of the trial and are consulted re dates of visits to allow dates to be agreed that enable STA staff to attend some visits.</p>	<b>September – October 2019</b>
8	<p><b>Interim Handover – Critical Step</b></p> <p>Provide electronic copies (template provided) of all draft items and mark schemes, and draft item classification spreadsheet(s). Items and mark schemes to include suggested mark-up or amendments as a result of feedback from informal trialling, and there should be clear evidence of how those amendments are intended to improve item functioning. If items</p>	<p>100% of drafts of all materials required for completion of work package received electronically by agreed date and to criteria specified in section 4.5, along with</p>	<b>November 2019</b>

No	Deliverables/Outputs	Acceptance Criteria	Due Date
	<p>are rejected as a result of trialling, the supplier must ensure that there are alternative, viable questions that have been presented and discussed at the pre-trial meeting. Additional item writing should not be necessary at this stage.</p> <p>Provide a summary table demonstrating the coverage of the interim handover materials against the number of marks, response types, content and cognitive domains specified. Please also provide text mark ups, mapping the questions to the specific areas of text.</p> <p>Suppliers must seek to limit the number of items assessing the same thing, albeit in a different question format in the final handover questions. These types of questions will be counted as one item for the purposes of the final handover package.</p> <p>Suppliers must minimise the number of enemy questions assessing any one text as per the specification of requirements below.</p> <p>Handover electronic versions of all Informal Trialling booklets and mark schemes/coding frames.</p> <p>Mark schemes must also include comments gathered in internal review meetings and findings from informal trialling. This element replaces the requirement to produce a separate informal trial report.</p> <p>The Contractor must handover InDesign files (STA uses CC 2014 or equivalent subject to prior agreement) of at least 10% of the total marks required at the interim handover stage in order for STA to check that the materials meet the Design Specification (see Annex F of the ITQ). The</p>	<p>summary table and text mapping mark-up</p> <p>All items informally trialled and being considered for Final Handover have received positive feedback from teachers and / or pupils; or are submitted with amendments and supporting evidence from trialling for those amendments.</p> <p>STA Test Development Researchers to attend and present collated feedback from TDRs and curriculum reviewers.</p>	

No	Deliverables/Outputs	Acceptance Criteria	Due Date
	remaining items can be handed over in InDesign or MS Word (or compatible) format.		
9	<p><b>Interim Review Meeting</b></p> <p>Meeting with STA and item writers to review materials and outputs from the Supplier's internal review and informal trialling.</p> <p>Meeting will be used to discuss informal trialling – key messages, problems, discuss the report, resolve issues identified with items and agree any changes to items. In the report the Supplier must say why the change is suggested and what evidence there is for the change.</p> <p>At the meeting, the Supplier should also expect further review comments from STA TDRs and curriculum reviewers in light of any changes made at the pre-informal trialling meeting.</p> <p>These further changes to materials will be discussed at this meeting. The Supplier will complete these and any other agreed amendments prior to final handover.</p> <p>The Supplier must ensure that there are additional alternative, viable questions that can be presented and discussed at the interim review meeting should items be rejected as a result of trialling or STA review comments. Additional item writing should not be necessary at this stage.</p> <p>The Supplier should note any amendments and STA will confirm arrangements for sharing amendments and actions to be taken after the meeting</p>	<p>Project Manager / Lead Item Writer attend Interim Review meeting on agreed date.</p> <p>STA Test Development Researchers to attend and present collated feedback from TDRs and curriculum reviewers.</p>	<b>December 2019</b>

No	Deliverables/Outputs	Acceptance Criteria	Due Date
10	<p><b>Final Handover – Critical Step</b></p> <p><b>Electronic Handover</b> – Supplier to hand over materials using the DfE portal in the first instance. However, an encrypted memory stick (provided by STA) or Egress transfer can be used as a contingency. (File formats for each of these to be confirmed with STA).</p> <p>Assignment / licences of IPR for DfE’s benefit completed.</p> <p>The handover acceptance meeting is to take place at STA offices wherever possible.</p> <p><b>Hard Copy Handover</b> - Supplier to hand over hard copies of the texts, items, mark schemes and item classification grid. (STA will confirm how the documents should be collated).</p> <p>We ask that suppliers split the item set for each text into two different versions as per the specification of requirements (see pages 21 and 25 in the ITQ).</p> <p>Please also provide a mark-up for each text, mapping the questions to the specific areas of text being assessed.</p> <p>A template for the item classification grid is provided at Annex B of the ITQ.</p>	<p>100% of specified hard copy materials received at STA by agreed date and materials are of appropriate quality as listed under Performance Requirements.</p> <p>Receipt of electronic materials specified and attendance at Final Handover meeting on agreed date (“Final Handover Date”).</p>	<p><b>Electronic Handover:</b></p> <p><b>Meeting to confirm acceptance of materials:</b></p> <p><b>Hard Copy Handover:</b></p>

No	Deliverables/Outputs	Acceptance Criteria	Due Date
11	<p><b>Acceptance of Final Handover Materials – Critical Step</b></p> <p>Materials must be handed over as per specification, so that materials match templates as required and all other instructions are followed.</p> <p>If any errors are found following Final Handover or the materials are not compliant with this specification, all materials will be returned to the supplier for full checking and correction. Final payment will be withheld until this is completed. Fully checked and corrected materials must be returned no later than two weeks after the Final Handover date.</p> <p>STA will notify Supplier once all Acceptance Criteria have been met.</p>	<p>100% of specified materials with STA no later than two weeks after Final Handover Date. All materials to be error free.</p>	<p><b>January 2020</b></p>

#### 4. Key Milestones

ID	Description	Key Milestone Acceptance Criteria	Completion Date	Evidence Required
1	Interim Handover	<p>100% of drafts of all materials required for completion of work package received electronically by agreed date and to criteria specified in section 4.5, along with summary table and text mapping mark-up</p> <p>All items informally trialled and being considered for Final Handover have received positive feedback from teachers and / or pupils; or are submitted with amendments and supporting evidence from trialling for those amendments.</p> <p>All items requiring significant amendment following interim review are submitted with appropriate amendments and any required new items are accepted following review.</p>	15 November 2019	Materials delivered on time and to standard.
2	Final acceptance and hard copy handover	100% of specified materials with STA no later than two weeks after Final Handover Date. All materials to be error free and of appropriate quality, as listed under Performance Requirements.	4 February 2020	Materials delivered on time and to standard.

		Receipt of electronic materials specified and attendance at Final Handover meeting on agreed date ("Final Handover Date")		
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## 5. Key Payment Milestones and Key Payment Milestones Dates

Payment will follow the completion of the Key Milestones listed at Section 4 of the ITQ. The maximum Key Payment Milestones payable calculated in accordance with the Supplier's 'Cost Breakdown' table in Annex C of its proposal are:

**REDACTED**

TO NOTE:

- The total contract price is based on 100% of items being trialled. In the event that 100% of the items developed are not trialled, then, payment will be reduced on a pro-rata basis in accordance with Supplier calculations based upon the fixed and variable costs formula used to calculate the amounts in the Supplier's proposal for trialling of items.
- This work is VAT exempt.



## 6. Contract Management Arrangements

The Supplier shall be fully engaged on an on-going basis in regular Contract Management Reviews relating to this Call-Off Contract and the overarching Framework Agreement. These reviews provide an opportunity for the Department and the Supplier to discuss the end-to-end delivery of the Services which shall include but not be limited to:

- planning;
- progress;
- risk management;
- issue management;
- continuous improvement;
- proposed changes;
- lessons learnt;
- exit management.

Reviews will be carried out with Senior Management on a six month basis where the Department and the Supplier will meet to discuss Supplier performance, lessons learnt, continuous improvement, value for money, exit management and any other issues considered relevant by the Department.

## 7. Supporting documentation

The Key Stage 1 and 2 English Reading ITQ document for the 2022 Item Writing cycle sets out the full specification of requirements including the project deliverables, functional requirements and performance requirements. The original English Reading ITQ and the supplier's response are appended to this contract document.

REDACTED

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

Signed for and on behalf of the Department for Education:

REDACTED

Name and Title: REDACTED

Date:

REDACTED

Signed for and on behalf of the Supplier:

REDACTED

Name and Title: REDACTED

Date: REDACTED