

# Appendix USVI-1: Science Assessment (*VIDE SA*)

## OBJECTIVE AND SCOPE OF WORK

In addition to the focus of the main RFP documentation, the Smarter Balanced assessments for mathematics and ELA, U.S. Virgin Islands (*VIDE*) is soliciting for services related to administration of the *{VIDE Science Assessment (VIDE SA)}* as described below.

- Item and stimulus development, administration, scoring, and reporting of the *{VIDE SA}* in grades 5, 8, and 11 (high school).
- Hosting computer-based, fixed form test engine(s), meeting select specifications set by *VIDE* and consistent with *VIDE*'s assessment requirements.
- Data Inventorying & Archiving

*{VIDE SA}* is a state-developed assessment comprised of a state-specific stimulus and item bank. For these services, all Requirements described in section 2: Technical Proposal on page XX apply to the *{VIDE SA}*.

Proposals for the *{VIDE SA}* can consider:

- References to Smarter Balanced with respect to mathematics and ELA in the body of the RFP are assumed to refer to *VIDE* with respect to the *{VIDE SA}*.
- The *{VIDE SA}* is aligned to the Next Generation Science Standards (NGSS) not the Common Core State Standards.
- The *{VIDE SA}* primary administration form is online as a fixed-form test not an adaptive test.
- The *{VIDE SA}* is administered at grades 5, 8, and 11 (high school) not in all grades 3–8 and 10 (high school).
- The Digital Library is not used for resources for the *{VIDE SA}*.
- The *{VIDE SA}* does not include interim assessments.

Requirements for the *{VIDE SA}* for specific sections of the Technical Proposals, beyond or different from what is required for the Smarter Balanced mathematics and ELA tests, are described below. If a section is not included below, the expectations for the *{VIDE SA}* are the same as the expectations for the Smarter Balanced tests.

## FUNDING

Exact financial terms shall be determined during the contracting activities for each agency.

Any contract awarded as a result of this procurement is contingent upon the availability of funding. The Bidder shall provide their most favorable and competitive cost estimate to perform the work.

## REQUIREMENTS

### 2.1.A Test Development

Contractor will coordinate with VIDE and VIDE's current assessment vendor for the purpose of gaining access to VIDE's science item bank. Direct test development activity is intended to populate various test forms used in annual administrations and will be established with the Contractor as a result of this RFP. This includes all the item types and test features currently used with the Smarter Balanced assessment, plus item types and administration features specific to the {VIDE SA} assessment (which are detailed below).

- Locking Items  
Locking items is a required feature. Locking items present to the student first with a green open lock icon. The student can answer the item as normal then, when the student moves to the next item, they are given a pop-up prompt that they must confirm they have completed answering the question. The student then is moved on to the next item. If the student comes back to a locking item, they are able to see the item and their response, but the item now presents with a red closed lock icon and are not able to change their answer. The response portion of the item will be lightly "grayed" out. If the locking item appears in a cluster, there is a unique stimulus that appears with the item that may be a duplicate of a stimulus that appears for other items in the cluster or may be a unique stimulus.
- Multiple Stimuli  
Multiple Stimuli is a required feature. The same stimuli must be available to associate with items in flexible ways. This may require cloning stimuli such that one clone of the stimuli can be associated with a set of items (usually 1 to 3 items) and another clone of the same stimuli can be associated with another set of items. This is necessary to support the locking items feature. Vendors must be able to apply any edits, accommodation, translation, glossary, etc. made to one clone of a stimuli to all clones of the same stimuli.
- Collapsible Stimuli  
Collapsible stimuli may be substituted by a psychometrically-approved alternative if proposed by the contractor and approved by VIDE staff. Collapsible stimuli present multiple stimuli on a screen with stimuli not directly connected to the items being currently presented as accessible to the student. This is how clusters with multiple stimuli are presented to students as the student progresses through the items in the cluster. Stimuli presented later in a cluster are not available to students when answering locked items earlier in the cluster.
- Multi-Part Items  
Multi-part items is a required feature. Some questions are divided into more than one part. Each part must be scoreable and data must be able to be gathered on student performance for each part. Parts must be able to be fluidly combined for overall scoring of the question, e.g., questions with two parts must be able to be scored as either 1-point or 2-point questions. Multi-part items must be able to use any combination of item type for any part.
- Stimulus/Question Expansion Buttons  
Stimulus/Question Expansion Buttons may be substituted by a psychometrically-approved alternative if proposed by the contractor and approved by VIDE staff. By default, the screen for items that present stimuli and questions is split 40% stimulus and 60% items. The Stimulus/Question Expansion Buttons allow students to expand both the left side of the screen or the right side of the screen to better read the stimulus or questions. The student clicks on a right-pointing arrow to expand the stimulus and a left-pointing arrow to expand the question.

This results in a 90/10 split of the screen. Students then click on the opposite arrow to return the screen to a normal, 60/40 split presentation.

- Item Types and Features

The {*VIDE SA*} allows all item types and item interactive features available for the Smarter Balanced assessments. In addition, the {*VIDE SA*} requires the following item types and interaction features be available in the test delivery system and by the test vendor:

- Edit task inline choice: the student selects words, chemical compounds, or other objects from drop-down menus to complete a sentence or phrase. The drop-down menu must support text that may contain superscript and subscripts.
- Scored simulations: the student makes selections and then clicks a button to have the system generate data, presented in a table, to the student. The data that the student generates is scored.
- Non-scored simulations: the student makes selections and then clicks a button to have the system generate data, presented in a table, to the student. The data that the student generates is not scored; rather, the student uses the data to answer another question that is scored.
- Video animations (no audio): the student views an animated video related to the content of the stimulus.
- Periodic Table: a static periodic table provided to students as a resource, accessed by students in a similar manner as they would access the calculator.

As a state-developed assessment, the {*VIDE SA*} requires vendors' facilitation and support for all the same tasks as described for the Smarter Balanced assessment. In addition, there are unique tasks required for the {*VIDE SA*} development, specifically:

- item and stimuli development with *VIDE* staff
- item and stimuli development with educator committee that includes vendor staff support
- content review with educator committee that includes vendor staff support
- item entry into an item authoring system which allows *VIDE* reviews
- bias and sensitivity reviews
- continuous and ad hoc psychometric support for tasks including test form development
- continuous and ad hoc art support for item and stimuli development
- providing accessibility and accommodations features for each stimulus and item
- range-finding with educator committee that includes vendor staff and psychometric support
- rubric validation
- data review with educator committee that includes vendor staff and psychometric support

Documentation, designed to fulfill requirements of the U.S. Department of Education's Peer Review process, will be provided by the Contractor for all pertinent elements of the science assessment scope of work. Contractor and *VIDE* will collaborate on applicable tasks referenced within.

Unlike the Smarter Balanced assessment, item development for the {*VIDE SA*} is an expected part of the RFP related to the {*VIDE SA*}. The following sections describe the expectations of proposals for item development related to the {*VIDE SA*}.

## Major Areas of Work

The following sections detail major areas of work desired:

- Test Development
  - Development of item specifications
  - Stimuli, Item and test development
  - Transfer to test delivery vendor
  - Paper-Pencil Formatted Test (two forms per grade-level to address accommodations)
- Production of Ancillary Materials

## Science Test Development Requirements

Contractor shall provide for the development, of technically-sound science assessments for grades 5, 8, and 11, and supporting resources for VIDE in accordance with the provisions and requirements stated herein. All development, and associated work should follow nationally accepted best practices for large scale summative assessment.

Contractor shall ensure that each assessment meets or exceeds the content and technical standards established by *The Standards for Educational and Psychological Testing*, published jointly in 2014 by the American Educational Research Association, the American Psychological Association, and the National Council on Measurement in Education, and any subsequent revisions. Additionally, the Contractor shall ensure that each assessment meets or exceeds the requirements of the United States Department of Education's Peer Review process for state standards and assessments.

Contractor shall facilitate the transfer of all stimuli and items, including graphics, to VIDE's test delivery vendor. Contractor shall provide the general assessments in science for all VIDE students enrolled in grades 5, 8, and 11. Stimuli and items must be developed for field testing every year, adequate to maintain the item bank and the development of new test forms every year and multiple equivalent forms for high school.

## Grade-Level Science Assessment Development

### Item Specification Development

Contractor, in collaboration with VIDE, shall produce item specifications including, but not limited to, the following:

- Requirements for the application of universal design principles,
- Content to be tested,
- Construct definitions, including relevant and irrelevant factors,
- Item types to be employed,
- Cognitive complexity,
- Use of graphics, tables, charts, simulations, animations, etc.

### Item Development

State intends the involvement of state educators in the development of the assessment items and tests under the supervision of state assessment staff and the facilitation support of Contractor's content specialists.

For the purposes of this RFP, the terms "item" or "test item," whether singular or plural, means stimuli, test stems, student response choices or mechanisms for open-ended or technology supported responses, and associated meta-data, and must comply with the item specifications set out within the *Standards for Educational and Psychological Testing (2014 Edition), Chapter 4*.

Item development is a major and critical component of the project. Contractor shall work with VIDE and educator committees to develop new items. Items consist of stimuli, item stems, student response choices or mechanisms for open-ended or technology supported responses, and associated meta-

data and need to follow the specifications set out within the *Standards for Educational and Psychological Testing, Chapter 4*.

The new assessments are to be delivered primarily in an online format, using item types utilized in the Smarter Balanced assessments in addition to item types provided by the test delivery vendor specifically for the science assessments and those described in this appendix. To the extent possible, the new science assessments should provide opportunities similar to the experience students currently have as they interact with the existing test interface.

VIDE is open to innovative approaches to item development and test form development which incorporates the three-dimensional aspects of the state science standards. Tests for the general assessment can include multiple item types, taking advantage of industry best practices and emerging research in the field of science assessment.

### *Item Cluster Writing*

Members of the item cluster writing committees are solicited and selected by the state. Approximately twelve (12) teachers per grade level attend each item cluster writing session. Newly-developed items go through several stages before going to content reviews.

Science item clusters including stimuli, items, and initial art are planned and drafted by Contractor's content specialists in collaboration with state science assessment specialists. The development plan shall include, but not be limited to, factors such as number of item clusters and standalone items to be developed; item types; cognitive complexities; item difficulties; use of graphics, tables, and charts; and details on technology enhanced items.

During science item cluster writing workshops, stimuli, items, and rubrics are written by educators with oversight by state science assessment specialists and support from Contractor content specialists. Art is revised and/or added during item cluster writing workshops.

Following the item cluster writing workshops, state science assessment specialists and Contractor content specialists collaborate to refine and edit all stimuli, items, art, and rubrics.

Upon VIDE approval, the Contractor will take stimuli, items, rubrics, and art through a style and copy editing cycle and provides technical feedback. Other review criteria include: universal design principles, alignment to item specifications, alignment to appropriate cognitive and language complexity, fairness, accessibility, reasonableness and completeness of rubrics and scoring criteria, grade appropriateness, technology-based presentation.

VIDE staff reviews feedback from Contractor, makes any adjustments needed, reviews revisions and signs off on draft versions of field test items and rubrics that will move forward to content and bias review.

In addition to item clusters, VIDE intends to include standalone items in the item bank. VIDE shall specify the performance expectations and grade levels targeted for the items. Contractor shall submit the items to VIDE science assessment specialists for review and comment prior to bringing them to the content review committee of educators.

Contractor shall provide examples of item types appropriate for each grade span and assessment that must be developed. Timelines for item development, including approaches that incorporate the use of VIDE educators in item development as well as item review committees, shall be included in the description of the project.

Contractor shall be able to provide templates in the form of Word documents for stimuli and item development for item writing and the item review processes.

### *Science Content and Editorial Review Cycles*

Stimuli, items, art, and rubrics are reviewed by Content Review committees for alignment to item specifications, alignment to appropriate cognitive and language complexity, fairness, accessibility, reasonableness and completeness of rubrics and scoring criteria, grade appropriateness, and technology-based presentation.

Content review committees will be composed of approximately five (5) content and grade-level expert educators, facilitated by state science assessment specialists with support from Contractor's content specialists. Items are identified as accepted, accepted with revisions, or rejected. Stimuli, items, art, and rubrics are edited during content review by VIDE and Contractor based on feedback from Content Reviews.

Revised stimuli, items, art, and rubrics are reviewed by Bias & Sensitivity Review committees. Items are identified as accepted, accepted with revisions, or rejected. The contractor will solicit and select the four to six members of the Bias and Sensitivity Review committee in collaboration with the State. To the extent possible, VIDE community members representing the demographics of VIDE students must have the opportunity to continue to help in the bias and sensitivity review processes. Bias and Sensitivity Review committees will be facilitated by Contractor by an expert not directly associated with the development of the items. A representative from the State will attend to assist in recording the recommendations of the committee.

Stimuli, items, art, and rubrics are edited by state science assessment specialists based on feedback from Bias and Sensitivity Reviews.

Contractor takes stimuli, items, art, and rubrics through final style and copy editing cycle and prepares for inclusion as embedded field test items on the operational test forms.

Contractor delivers stimuli, items, graphics and rubrics to the test delivery and scoring vendor in the approved format for insertion into operational test forms.

All items will require field testing, and it will be the expectation that Contractor work with VIDE's test delivery vendor to ensure integration of new items into applicable field test opportunities. State would prefer to append field testing to existing operational assessments, but the scope of development may result in the need to conduct stand-alone pilots. Bidder should submit proposal addressing both possible scenarios.

The number of test forms developed is determined based on the number of new items to be field tested to ensure maintenance of a sufficiently robust item pool.

Field tested items are analyzed using classical and IRT item analysis procedures by the test delivery and scoring vendor. Item analysis data include: item means, item-score to total-score correlations, option to total-score correlations for multiple-choice items, percent choosing each option for multiple-choice items, percent earning each rubric score for short-answer and extended-response items, Rasch item difficulties, INFIT and OUTFIT statistics, item standard errors, and Mantel-Haenszel DIF statistics (with indications of the direction of DIF for each comparison group).

Item level data from field test item analyses are reported on item cards or an equivalent format leveraging advances in technology (with items, answer keys or rubrics, and associated data) and brought to Content-Data Reviews by the test delivery and scoring vendor.

Five (5) to six (6) teachers from the appropriate grade level and content area attend each Content-Data Review session.

Content Data Review committee meetings are co-facilitated by state science specialists, the test delivery and scoring vendor's psychometrician, and the Contractor's content specialists. Content Data reviewers (state educators) examine any items flagged, based on item analysis data (criteria include: item means < half the points possible, item total correlations < .20, option to total correlations for incorrect multiple-choice answers that are > .00, attractiveness of all answer choices for multiple-choice items, expected patterns of percent earning each score based on the overall difficulty of the item, extreme DIF statistics, poor IRT fit statistics). Reviewers accept, accept with minor revisions as approved by psychometrician, or reject items based on item-level data.

Items accepted after Content Data Reviews are candidates for operational testing. Selection of items for operational tests is guided by test specifications.

State science assessment specialists, the test delivery and scoring vendor's psychometrician, and Contractor work together to select science stimuli and test items for operational test forms. Stimuli and items are selected to reflect the test specifications and to optimize measurement at the proficient cut score.

### **Item Refreshing**

The Contractor shall include a plan for item development that meets an annual output sufficient to sustain the test administration.

Bidder efforts to exceed the target development described in this appendix will be viewed as a plus, but will not, in and of itself, influence a final decision by the agency with respect to contract award. The evaluated capacity and anticipated effectiveness of the Bidder in achieving the overall desired outcomes, based on the complete proposal, will remain the critical elements in award decision. The total clusters and stand-alone items described in this appendix are the expected number of items that will be approved by VIDE for presentation to the Content Review *and* Bias & Sensitivity Review meeting participants.

Contractor will administer, score, and report on grade 5, 8, and 11 science assessments using current agency items VI will use current items. (Additional item development or procurement of additional science items will be required; Bidder should provide a proposal that addresses both approaches for expanding the item bank.) With adoption of the Next Generation Science Standards (NGSS), Bidder should provide information addressing reviews, if applicable, of existing items for possible transition to NGSS-based assessments administered under this contract.

The agency will collaborate with Contractor to transfer the appropriate form(s) of the assessments to Contractor in a mutually agreed upon format to be placed on Contractor's test engine. Transferred forms shall include Braille and Large Print test forms, any applicable reference sheets, manipulatives, and other electronic tools provided for students. Braille and Large Print test forms shall include notes providing rationale for omitted items.

### **2.1.B Field Test**

Contractor will be required to support field testing of new items through embedding/appending the annual assessment. {*VIDE SA*} requires yearly field testing of items embedded within the operational test forms. In grades 5 and 8, there would be up to 6 clusters (each with up to 3 stimuli and up to 8 items) and up to 15 stand-alone items. In grade 11, there would be up to 12 clusters (each with up to

4 stimuli and up to 10 items) and up to 30 stand-alone items. These items would be distributed across multiple test forms such that each form would have up to 2 clusters and at up to 6 stand-alone items.

Pilot (field test) items will require range-finding, scoring and content data review to assess feasible use in later administration years. The number of scenarios and items required for Spring 2020 piloting and the format for implementing the pilot activities are as follows:

Approximately 10 items per scenario and 5 scenario sets per grade band are developed each year for science grades 5, 8, and 11. The items are typically 80% machine scored and 20% short response. Approximately 20 additional stand-alone machine-scoreable items are also developed.

Additionally, Contractor will be expected to follow the procedures outlined in section 2.6.D with respect to test review cycles.

### 2.1.C Accommodations

Contractor will provide for incorporation of all accommodations stipulated by associated guidance on accessibility, state-specific documents, as well as the Smarter Balanced *Universal Tools, Designated Supports and Accommodations Guidelines* (refer to Exhibit Ga of the main RFP document) to accomplish consistency in the presentation, to the extent possible, of the science assessments.

Consistent with aims of enhancing accessibility, where the state or an LEA uncovers an accessibility feature not currently addressed by governing documents, Contractor will collaborate with VIDE to evaluate the circumstances and possible incorporation in the current administrations. If the decision is to allow the newly identified means of access, Contractor will collaborate with VIDE to incorporate the accessibility feature, as feasible. Additionally, Contractor and VIDE will share information about the new accessibility feature with the consortiums which VIDE partners to consider continued incorporation into future administrations.

In those instances where VIDE wishes to be more restrictive with respect to means of access, Contractor will work with VIDE to adapt the Contractor's test engine to support the change in access guidelines.

Any changes in access guidelines, will require Contractor to ensure coding is updated to match administration protocols and that associated data capture with respect to identified access means are consistent with the guidelines.

Bids need to include details describing data-capture processes that will provide information, at the student level, on accessibility features selected prior to testing for the student and actual use by the student during actual testing.

The accessibility information must be portable across administration years such that state, district, or school staff do not need to re-enter student details from one year to the next. The information entered for a student in a given year needs to be exportable such that state, district, and school staff can analyze the data in connections with student performance on any given assessment.

### Translations

Both Glossing and Translation services are required for the {VIDE SA}. Contractor will include VIDE staff in both processes and implement work specific to VIDE staff approval. Contractor's test engine



will support all means of translation access detailed below. Contractor is advised to review the existing references provided in Exhibit Ga for guidance.

### **Translations - Spanish**

Contractor will accomplish full translations in Spanish of state-provided items, and other administration support materials (e.g., test directions, stimuli, etc.) for delivery within its assessment system. Contractor will include VIDE staff in this process and implement work related to translation upon specific VIDE staff approval.

### **Translation – Other Languages**

Contractor will accomplish full translations in the remaining identified languages on administration support materials (e.g., test directions, stimuli) for science that is supported within the Contractor's assessment system. Science items will not be subject to full translation in any language other than Spanish.

### **Glossing**

Contractor will identify and propose non-construct relevant terms within the state-provided items for glossing in all languages identified, inclusive of Spanish. Contractor will propose definitions for each proposed term.

This includes Spanish translations for stimuli and items in the operational item bank, as well as the translations of glossed terms and definitions consistent with the languages Smarter Balanced supports or fit specific needs of VIDE.

Languages for translation supports include:

- Spanish (full test administration and glossing)

- Arabic

- Vietnamese

- Cantonese

- Mandarin

- Tagalog

- Punjabi

- Korean

- Russian

- Ukrainian

- Ilokano

*{pre-recorded video embedded in test delivery platform}*

- American Sign Language (ASL)

In those instances where a state chooses to restrict translation access, Contractor's test engine must be programmed to disable the associated access feature.

Printed Test Form Provisions

**Print On Demand**

For students with specific testing barriers (i.e., student’s IEP dictates administration of tests in paper-pencil format), Contractor’s test engine programming must support the ability for print on demand (the student’s test can be designated through the test engine and accompanying connection to a printer, for creation of hardcopy versions of the items).

NOTE: Upon the student’s completion of applicable print version of items, test administrators would be expected to transcribe the student response into the test engine interface. Print versions of the test items will be destroyed under secure means.

Braille and Large Print

For each operational assessment, Contractor’s system will support administration instances in both Braille and Large Print.

**Braille On Demand / Large Print**

Contractor’s test engine will provide for students identified through an IEP to access the assessment through on demand Braille using refreshable Braille devices or Large Print formatting using vision enhancing tools or software.

**Braille and Large Print Testing Materials (Non-Computer)**

In those instances where a school or district is not prepared to support computer-based testing, Contractor will provide means of producing Braille and Large-Print forms based on the Smarter Balanced paper-pencil form.

Based upon the 2017-2018 testing data, VIDE estimate, but in no way guarantees, annual quantities for use of Braille and Large Print testing materials, by grade level and content area/course assessment as represented in the tables below.

Table 1a. – Estimates of Braille Student Enrollment

Enrollment	VIDE
Grade 5	2
Grade 8	2
Grade 11	2

Table 1b. – Estimates of Large-Print Student Enrollment

Enrollment	VIDE
Grade 5	5
Grade 8	5
Grade 11	5

Contractor shall provide a process for school districts to order Braille and Large Print testing materials, and shall distribute all such testing materials in a Braille/Large Print kit to the associated school district.

The contractor’s Braille/Large Print kit shall include Braille response documents for Braille assessments and appropriate response documents for Large Print assessments.

- Students being administered a Large Print assessment will respond directly on the Large Print test document, unless the student’s IEP specifies a scribing accommodation.

- Test administrators would be expected to transcribe student responses from Braille and Large Print test forms into the test engine interface.

Contractor shall provide for the secure return of Braille and Large Print testing materials to Contractor facilities. Contractor's Braille/Large Print kit shall include all materials (boxes, envelopes, and prepaid return shipping labels) for the schools to use to return testing materials.

### Assistive Technology

Contractor's test delivery platform shall support refreshable Braille devices and vision enhancing software. Contractor shall work with the state to explore the feasibility of supporting additional assistive technology including, but not necessarily limited to, screen reader and text to speech software, screen enlargement, and alternative input devices and software. If the state requests test access through a specific assistive technology device, Contractor shall make provisions to support the aforementioned assistive technology, but would not be responsible for providing any needed hardware or software (such as refreshable Braille devices) for school districts or the state.

### 2.1.F Test Engine

#### Testing Interface

The {*VIDE SA*} is anticipated to use the same testing interface as provided for ELA and math. Test directions and other text provided to students during testing must be flexible enough to support a unique text specific to {*VIDE SA*} test administration. This includes, but is not limited to:

- Student test directions
- Error, warning, and alerts messages
- Item tutorials
- Tool descriptions

Contractor will provide a secure, technology-based assessment delivery system (test engine) meeting the specifications consistent with that employed in administering the ELA and math assessments, accounting for content-specific modifications. Contractor's system will come with all necessary documented processes, manuals and platforms to support administration of the {*VIDE SA*}.

If the test engine is an existing design, Contractor must detail how the test engine fulfills *VIDE*'s expectation of compatibility with delivering the ELA and math assessments. Bidders must include as part of a proposal evidence that Bidder's test engine meets the established industry specifications and interoperability requirements in order to be considered a valid proposal. Proposals without such evidence will be considered non-responsive.

Bidder proposal must detail how the proposed test engine is, or will be, compatible with *VIDE*'s data system.

Access to any format of testing—summative, interim, practice, training—should be through a separate interface to preclude confusion on the part of administrators.

Bidder will submit with a proposal a plan for *VIDE* to engage in User Acceptance Testing (UAT) supporting each administration year roll-out. UAT must be scheduled to occur at a reasonable time of year to ensure smooth and effective introduction of any system updates or additions for school and district familiarization prior to the start of annual testing. Bidder should propose a projected schedule to achieve this aim, with an understanding that scheduling will remain fluid to any given year's system updating. Actual UAT dates will be set with *VIDE* on an annual basis at regularly scheduled planning meetings.

### 2.1.G Availability & Capacity

Bidder must demonstrate the load and surge capacity of its proposed test engine for use during testing times outlined in the RFP. Load capacity is to detail the test engine's maximum student participation that can be supported before system performance would experience possible performance degradation. Surge capacity is to detail other potential system interactions or the commencement of other system interfacing (if any) that might lead to performance degradation. Other system interfacing might be represented as new client start-up of testing, multiple test formats engaged with the test engine at congruent times, etc. A proposal should reflect with candor a Bidder's current client demand and implications or contingencies that would need to be addressed if being awarded a contract. A proposal will include explanations on how conflicting demands will not impact proposed services for VIDE.

### 2.1.H Technology Readiness

Bidder's expected minimum technology requirements are to be consistent with the minimum technology requirements established for the ELA and math assessment. Individual school districts shall be responsible for ensuring local technology capacity to administer assessments online. Contractor shall provide tool(s) for school districts to use in verifying the capacity of their technological infrastructure for conducting online assessments. Such tool(s) must function within Windows-based, Mac OS-based, and Linux-based hardware and operating systems, and must, at a minimum, address the following:

- 1) Proper configurations of network devices to ensure network connectivity from within the school district/building to internet locations required for testing.
- 2) Capacity of hardware for use in online testing (minimum workstation specifications, minimum bandwidth requirements, percent of bandwidth utilization at school/district levels).
- 3) Evaluation of the maximum number of concurrent assessments to be administered at each school.

In cooperation with VIDE, Contractor shall develop guidelines for schools to access and use the provided tool(s) using sample data at times during the school day that will closely replicate the operational testing environment. In addition, Contractor shall provide a methodology for validating that schools have completed the necessary steps for ensuring technological readiness to administer the assessments.

By September 1 of each school year, Contractor will provide a complete training program to orient administrators, proctors/test administrators, and teachers to the online testing environment and supporting systems use. The training program will provide access to a catalog of existing modules or other such training formats specific to Contractor's systems.

### 2.1.I System Security

Contractor's test engine will provide security protocols and techniques, consistent with industry standards, to protect both test content and student data. General security requirements shall include:

- Student access control to the testing interface with student authentication generated through a secure administrative system;
- Administrator access control including administrative authentication to gain access to administer tests, view/maintain student data, and access student performance reports;

- System checks that evaluate each user's access privileges at log-in and automatically disable or enable client functions based upon the user's profile.

Steps to enhance security of test content and student data include:

- Security of test content shall be device specific and device appropriate;
- Only valid authentication information may enable test content to be decrypted to a viewable format;
- Test content accessed via valid authentication information must be displayed only while the student is taking the test. Upon completing the test, any decrypted test content must automatically be removed from any systems outside of the host systems;
- Cached content is secured, managed, and purged;
- All transmissions of student data must occur over secure network connections that utilize authentication and encryption technologies.

Desktop Security During Testing – If tests are administered using desktop computer workstations, decrypted test content must be protected through control of the desktop computer while students are testing. Access to other applications or web sites must be disabled or disallowed while a test is being accessed. Strict controls must be maintained over operating system functionality, printing, copy and pasting, screen captures, keyboard shortcuts, right-mouse clicks, or other functionality that could compromise test content.

### 2.1.J Assessment Delivery System & User Interface Interoperability

The inter-component communication of the contractor's delivery system must use current industry-recognized standards (SIF, IMS, etc.) as well as any tools that are specific to VIDE based on VIDE's previous online testing history. Contractor's online assessment delivery system must be as flexible as possible to accommodate the varying technological capabilities that exist in VIDE's school districts. Additionally, Contractor's online assessment delivery system should accommodate virtual networks and/or thin client environments. As an alternative for school districts' administering online assessments with desktop workstations, the contractor's delivery system must also support administration within a secure wireless environment on tablets (including, but not limited to, iPads, Androids, and Chromebooks) or other mobile devices. The Contractor's online administration platform must accommodate the system requirements specified earlier that support the administration of the ELA and math assessments.

Contractor's assessment delivery system must meet the following minimum requirements with regard to various administration management details:

#### i. Data Management

- Ability for administrative users to view and edit student demographic information entered as part of the pre-identification process;
- Ability for administrative users to hand-enter student records prior to or at the time of testing;
- Capability to maintain both student-specific data fields and test-specific data fields;
- Capability for the test administrator to complete an electronic Group Information Sheet to determine how student results will be returned to the school district (by class, school, district);
- Regular, preferably daily, exchanges of data files between the Contractor and VIDE providing real time visibility of current student test-taking status (e.g., students pre-identified, tests completed, items to which students have responded, etc.) at the individual level.

ii. Test Management

- Ability to be configured with various form distribution plans that result in school districts automatically receiving the appropriate assignment of test forms for given test administrations.
- Ability to randomly assign spiraled sets of test forms to students.
- Ability for administrative users with appropriate access to schedule students for online tests and generate necessary student login information prior to testing.
- Ability for administrative users with appropriate access to assign specific test forms and accommodations (e.g., large print test forms) to individual students.
- Ability for select authorized users to view aggregate test information by course or grade level/content area such as number of tests scheduled (by date), number of tests being administered (real-time), number of tests completed, number of scoreable tests completed, etc.
- Ability to assign unique login credentials for each test session.
- Independent scrolling capability for items which include a stimulus and response options or response area displayed side-by-side.

iii. Test Engine Reliability

Contractor's test engine will demonstrate the robustness and reliability to meet state needs across multiple assessments formats. Contractor will ensure that test engine:

- Accommodates up to 100,000 simultaneous test administrations,
- Can safeguard against catastrophic events,
- Is available to school districts during the entire testing window, the pre-identification process and the enrollment window, as mutually agreed upon with the state,
- Is structured to allow school districts to accommodate needs of individual students, as well as small groups of students with unique testing needs.

Upon request, Contractor shall re-open a school district's identified content testing window at any time during the statewide window without additional charge to the school district or the state.

iv. Testing Interface

Contractor's student testing interface will provide the following:

- Device-appropriate display of text and graphics for all students
- Ability for students to navigate the complete test (forward, backward, and skipping items)
- Ability for students to mark an answer using a pointing device or keyboard
- Ability for students to view the text or graphic simultaneously with the item stem and distractors when an item, or set of items, is text or graphic intensive
- Online availability of any manipulatives (including, but not necessarily limited to calculator, spell check, graphing tools, dictionary, thesaurus, measurement tools, electronic annotation, formula charts, and scratch paper) as indicated in test blueprints
- Indication (on the workstation display) of the name of the student login used to access the test
- Ability to accurately match student data in the event that it is necessary for a student to restart a test

Contractor's online assessment delivery system should provide options to support common test-taking strategies including:

- Visually eliminating one or more distractors
- Highlighting and/or underlining key words or graphics
- Flagging items as incomplete or in need of review prior to completing the test
- Indicators of which items have been answered/unanswered

- Using online “scratch paper” with text and drawing capability

Contractor will upgrade and enhance the test engine as new technology for assessment delivery becomes available and as VIDE needs change. VIDE will have the opportunity to review and approve all planned changes to the test engine at no less than one full year from implementation on an operational assessment.

Contractor will establish monitoring systems with metrics/thresholds approved by VIDE to detect system errors (“bugs”). Contractor will grant access to VIDE to view error logs.

#### 2.1.K Administration

Contractor will facilitate the administration of {*VIDE SA*}. Contractor will provide the assessments for all public school students enrolled in grades 5, 8, and 11 beginning in the 2019-2020 academic year (spring 2020 test administration).

During a spring testing window, considered any time from mid-April to mid-June.

The grade 5, 8, and 11 science assessments will be administered online with a fixed-form design.

Member estimates for grade 5, 8, and 11 science assessments are provided in Table 2 below. These estimates are not to be construed as guarantees, but best determinations for bidding purposes.

Table 2. – General Student Enrollment

Enrollment	VIDE
Grade 5	1,500
Grade 8	1,500
Grade 11	1,500

The {*VIDE SA*} assessments will include a combination of selected-response (variations might be single or multiple responses), constructed response (open-ended responses), and technology-formatted (technology supported) items.

The specific number of each item type must coincide with the applicable test specifications.

Contractor will demonstrate the capacity to support at multiple equivalent form at each grade level during the same administration cycle, both to aid VIDE field test needs and in the event of a breach of test security.

At a minimum, Contractor must demonstrate the capacity to support an equivalent form to be used in the event of a breach of test security.

#### 2.1.D Practice Tests

Contractors will propose a plan to develop and make available Practice tests for use starting with the 2019-2020 school year. Creation of practice tests for {*VIDE SA*} will be dependent on the degree to which the item bank can support expanded item use.

After the introduction of Practice Tests, in succeeding years, Contractor will provide access to the applicable practice tests no later than October 15 of each year, (access to a pre-made Smarter Balanced version or one prescribed by the state) – that includes all item types – allowing opportunities for students to experience the structure and format of the operational test. A practice test will be available for each grade level/content area combination and will include Performance Tasks.

Practice tests must provide for inclusion of all embedded universal tools, designated supports, and accommodations. Additionally, practice tests should be grade-level specific to the associated assessment.

Practice tests must allow for guest access without need of the secure browser.

### 2.1.E Training Tests

For Year 1 of an awarded contract, Contractor will at the earliest opportunity possible (not to exceed October 30) update and provide access to the applicable science training tests prescribed by the state – that includes all item types – allowing opportunities for students to experience the structure and format of the operational test. Subsequent to Year 1 of a contract access to the practice tests will be in place no later the September 15 of the administration year.

Training Tests are to have available the same set of accommodations accessible within the Smarter Balanced Training tests, both for *Guest* access of the Training Test available through any public browser set-up and *User* access of the Training Test available through the secure test engine.

Training tests must provide for inclusion of all accessibility features embedded in the test engine platform. Attention needs to be made to consistency of accessibility features across content tests (ELA, math, and science).

To the extent practical, training tests should be made grade-appropriate for students such that in attempting to familiarize themselves with the testing interface there is no interference or confusion created by the complexity of the content used in the training test.

Contractor will make annual updates to the Training Test to provide new stimuli clusters and stand-alone items as identified by VIDE staff.

#### i. Field Support

**Ancillary Materials Production** – Annually, Contractor shall support the requisite development and distribution of the following ancillary materials for each assessment administration. Contractor must provide ancillary materials that allow for customization consistent with VIDE’s protocols and practices, and as applicable consistent with the protocols and practices of the ELA and math administrations.

**Test Administration Manual (TAM)** - Contractor shall develop, for electronic distribution, TAMs that clearly explain all procedures relative to {VIDE SA} test administration. The {VIDE SA} TAM protocols can be combined with other content assessments for a single administration year, if Contractor can demonstrate to VIDE’s satisfaction, the mean to clearly delineate each content/grade-level assessment.

The content of each {VIDE SA} TAM shall include, but not be limited to:

- Specific instructions for the administration of the applicable assessment;
- Nominal time requirements for each assessment (as appropriate);
- Scripts for administration of each assessment to ensure consistent and appropriate instructions are given to students.



No less than one hundred twenty (120) days prior to the beginning of each administration window, Contractor shall make the TAM for each assessment available electronically in Adobe PDF format for VIDE review.

No less than sixty (60) days prior to each administration window, the final TAM for each assessment must be available electronically in Adobe PDF format for VIDE to provide training to public-school educators; this version must be appropriate for posting on the VIDE website or testing portal. VIDE shall have authority to approve all language, content, and format of the TAMs.

Contractor will provide the TAM for each assessment in printable Adobe PDF format. Upon request by a school district, Contractor will provide a print copy of the TAM to the school district, at the school district's expense. For school districts requesting print copies of the TAM, Contractor will invoice school districts for the costs. Contractor will provide print copies according to the school districts' orders, but no less than 14 days prior to each administration window.

**Test Coordinators Manual (TCM)** - Contractor shall develop for electronic distribution a Test Coordinators Manual (TCM) that explains all procedures relative to the organization of school district level testing. As applicable, Contractor will develop separate {VIDE SA} information.

The TCM shall include:

- Appropriate processes for returning Braille and Large Print testing materials;
- Appropriate processes for handling accommodations requiring a paper/pencil test accommodation;
- Appropriate measures for protecting test security at the school district level;
- Suggested times for test sections and suggestions for school district level test scheduling;
- Appropriate processes for including special populations of students in testing;
- Important dates leading up to, during, and after the testing window(s);
- How to handle student absences and other unique testing situations (e.g., testing of homebound students, students moving into and/or out of the school district during the testing window, etc.)

Contractor shall provide all TCMs in printable Adobe PDF format ready for posting to the state websites no later than forty-five (45) days prior to the start of annual testing. If any TCM contains proprietary information, Contractor shall make a non-proprietary version of the TCM available for posting on the state's website. Upon the request by a school district, Contractor shall provide a print copy of the TCM to the school district, at the school district's expense. For school districts requesting print copies of the TCM, Contractor shall invoice the school districts for the actual cost of the TCM. Contractor shall provide print copies, according to the school districts' requested quantities, but no less than 14 days prior to each administration window.

Contractor shall collaborate on annual reviews of the TCM(s) with VIDE. VIDE shall have authority to approve all language, content, and format of the TCM.

ii. Operations Support (Help Desk)

Contractor will provide Tier 1 help desk support to VIDE. Contractor will collaborate with VIDE to determine the degree of direct contact with districts and schools, and which

inquiries will be directed to VIDE to address. At a minimum, Contractor will address inquiries specific to administration processes as included in the associated manuals and ancillary materials.

Contractor's Tier 1 help desk will receive technical questions with respect to the test engine and other technology supporting the assessment program serviced under this solicitation. Inquiries of a technical nature and specific to Contractor systems will be directed to the Technical Support desk.

Contractor's help desk will be staffed during normal school hours for VIDE plus two hours before and after the school day (nominally 6:00 a.m. to 5:00 p.m. local time).

Contractor will provide VIDE regular access to the state's call log information and help desk performance metrics. Information from help desk interactions will be reviewed for program improvements. Contractor will be expected to make initial contact regarding any inquiries within 24 hours of receipt; during testing windows response time would be expected to be shorter (within 2 hours).

iii. Technical (Tech) Support

Contractor will provide Tier 2 and 3 level technical support to address inquiries involving the various technology behind the computer-based testing interface. Response times, reports, and metric expectations similar to the Tier 1 help desk are required for the Tech Support services.

iv. Administration and Technical Training

Contractor will establish and implement a training plan for district, school, and technology coordinators and teacher administrators on all aspects of the assessment program. In collaboration with Contractor, VIDE will determine audience, topics, frequency, and mode (face-to-face, webinar, video modules, etc.) of the training, including such elements as format, participants, and logistics. Training will also include technical and administrative training on relevant test administration processes for all stakeholders.

Contractor will develop other supporting resource material including user guides and FAQs.

Contractor will collaborate with VIDE to develop test administration training materials for annual release to school and district administrators. Once final products are developed, Contractor will deliver the needed resources to the state for use in annual training events. Where applicable, {VIDE SA} trainings can be combined with trainings supporting ELA and math administration.

A proposal will demonstrate the ability for VIDE to link test administration training to a state-level Learning Management System (LMS) and provide for individual certification on testing systems and processes.

A Bidder technology solution will support creation of demonstration ("Demo") districts for state-level users that will contribute to the development of resources to aid school and district staff in becoming familiar with the Contractor's systems and provide context for responding to technical assistance. Demo district are also useful in setting up and working through User Acceptance Testing (UAT) on system additions, modifications, and updates.

A proposal must include a Bidder's plan to establish one or more "sandbox" district to allow all educators a means to engage with the various test engine systems in a consequence-free training environment. The intent is to increase local administrator and teacher understanding of the actual testing systems being used. A "sandbox" district should:

- a. Include pre-generated data for educators to apply in system trials.
  - b. Include functionality for educators to generate their own data through creating demonstration student records, administering tests to demonstration students, scoring demonstration student responses (both automatically and manually), etc. allowing educators to experience the various processes involved.
  - c. Be sustainable (not having to be rebuilt from the ground up) across contract years.
  - d. Be available from August through June—the effective school year for districts—so access can be gained for educator training.
- v. **Paper-Pencil Forms**  
Paper-pencil forms will only be required in context of student-specific accessibility (i.e., a student cannot interact with technology and has a document need to use paper-pencil).

### Secure {VIDE SA} "Say" Scripts

The "Say" scripts provide directions to local proctors to administer paper-pencil versions of the {VIDE SA}. These secure scripts need to be printed and shipped to districts along with the secure test booklets.

A Bidder's technology (online) system solutions must provide for local entry of paper-pencil responses to submit for scoring along with other online student entries. The same system will also provide local educators the ability to input student responses to large print and Braille paper {VIDE SA} test forms. The response-entry system should mirror or at least be similar enough to the actual student test interface such that the item, as it is presented in the paper (alternate form) booklet, is identifiable as the same item response-entry system.

vi. Irregularities

Testing irregularities come in two unique forms: (1) improper or suspect student testing outcomes, or (2) "alerts" associated with communicating a situation involving risks to student safety.

### **"Alerts"**

For all assessments including constructed response, performance, and technology items (hand-scored and/or scored electronically using an automated engine), Contractor's scoring processes shall allow for immediate identification of "alert" papers according to VIDE specifications.

Contractor will provide a secure FTP site or other means of providing an electronic file of the student's response to VIDE. Contractor will communicate to VIDE weekly updates on posted "alert" papers via email.

Each "alert" response must be saved to the secure site as a unique file with appropriate identifying information.

### **Improper / Suspect Student Testing Outcomes**

Contractor will identify the situation when discovered to VIDE staff and provide a means to share the information in question for state review.

When directed, Contractor will support further sharing of suspect information with applicable district staff for purposes of investigating the situation.

Contractor will proceed with scoring the student record, but will flag the data for additional validation steps. At a point in the scoring process, VIDE will communicate with Contractor whether the student record will proceed to reporting or be designated as “invalid”. This decision may be in response from investigation results provided by the district or other input.

vii. Data Management

Before, during, and after each operational administration of {*VIDE SA*} assessments, Contractor will provide VIDE with the opportunity for data processing and data verification activities in accordance with the requirements described herein. Bidder solutions to student data management must address in detail how interaction with a current state’s data system will leverage technology and devise protocols to accomplish seamless integration that precludes VIDE needing to develop work-arounds to accomplish the needed outcomes.

### **Pre-Identification (PreID) System**

For all operational {*VIDE SA*} assessments, Contractor will replicate pre-identification business rules consistent with the rules used for ELA and math assessments. VIDE will have final approval of the business rules established for each administration year.

Contractor and VIDE will meet prior to each administration year to establish applicable business rules and set schedules for exchange of pre-identification and other enrollment information per the business rules supporting the applicable assessment.

Contractor will guarantee collaboration with VIDE for the inclusion of state updates to the pre-identification/enrollment information (accounting for new or transfer students) and post-testing student file clean-up.

Contractor’s pre-identification systems must provide the VIDE and corresponding school districts with the ability to generate pre-identification rosters sorted by school district, building, grade level, or classroom teacher.

At a minimum, Contractor’s pre-identification system must support data collection and disaggregation that is consistent with VIDE’s data management rules.

If necessary to meet state or federal requirements, Contractor shall provide VIDE with the ability to add additional data elements, at no additional cost.

### **Data Management (Record Reconciliation)**

Contractor will establish procedures, in concert with VIDE, to provide districts the opportunity to reconcile discrepancies in the collected student file prior to release of reports. The procedure would allow an early look at the General Research File (GRF), post-testing, but possibly prior to consolidation of scores, to ensure all students are accounted for and with the correct information.

### **Final Score Files**

Contractor will collaborate with VIDE on final review and approval of the score file prior to acceptance by the state. Upon approval of the final score file, Contractor will use said file for the production of score reports.

viii. Data Analytics/Forensics

Contractor will provide estimates for conducting post-testing forensic procedures, following each administration, and provide analysis on collected data associated with response patterns at the student, classroom, school, and school district levels for purposes of identifying possible testing irregularities.

ix. Scoring

Following each operational administration of {*VIDE SA*} assessments, Contractor shall fulfill scoring activities in accordance with the requirements described herein.

Selected Response Items - Contractor shall provide electronic scoring of selected-response items on all assessments. The contractor's process for scoring selected-response items must incorporate adequate quality assurance checks to ensure accuracy of student scores.

Constructed Response Items – Contractor shall provide hand-scoring, automated electronic scoring (as applicable and available), or a combination of the two, for all constructed response items.

Performance Items - Contractor shall provide hand-scoring, automated electronic scoring (as applicable and available), or a combination of the two, for all performance items.

Technology Items - Contractor shall provide hand-scoring, automated electronic scoring (as applicable and available), or a combination of the two, for all technology items.

**Hand-Scoring Requirements:**

For all hand-scoring processes, Contractor will demonstrate, to VIDE's satisfaction, compliance with established hiring standards for all scorers and validate that the established hiring standards are consistent with accepted industry norms. Hand-scoring processes must include technically sound methods of training and qualifying scorers. Training materials shall be identified by Contractor and shall be provided to VIDE for review and approval. Training plans and materials must be approved by the VIDE at least one month prior to the beginning of scoring.

Contractor's hand-scoring process shall incorporate ongoing checks for and controls against scorer error. Contractor's hand-scoring process shall provide for a minimum of a total of 15 percent blind double reads across all constructed-response, performance and technology items. In addition, Contractor's hand-scoring process shall provide for ongoing read-behinds by experienced personnel and any necessary retraining to ensure scorer accuracy. At a minimum, Contractor will ensure the following agreement rates for each scoring event:

Score Point Range	Exact Agreement Standard
0-1	80%
0-2	70%
0-3	70%
0-4	60%

**Automated Electronic Scoring Requirements:**

If Contractor's scoring processes include automated, electronic scoring to score constructed response, performance and technology items, Contractor shall first hand-score a minimum of 2,000 student responses to each item type to calibrate the scoring engine. However, it may be necessary for Contractor to hand-score as many as 5,000 student responses for some items to obtain sufficient responses at the extreme upper and lower score points to calibrate the scoring engine. Hand-scored responses need not be electronically re-scored in order to generate a reported score.

If Contractor utilizes automated electronic scoring to score constructed response, performance and technology items, the protocol for scoring shall incorporate procedures to ensure that scores assigned electronically are consistent with scores that would be assigned using traditional hand-scoring procedures. Contractor's scoring procedures shall include a human second read for a minimum of 15 percent of student responses. These second reads shall occur outside of the 2,000 responses scored to calibrate the scoring engine. If scoring accuracy falls below agreement rates specified herein for hand-scoring, Contractor shall recalibrate the scoring engine.

Contractor's scoring process shall incorporate established data specifications consistent with ELA and math to ensure accuracy of data. Should any questions regarding the scoring of student responses develop during the scoring process, VIDE shall review the unexpected student response with Contractor.

Throughout all scoring processes Contractor will provide necessary security measures to ensure protection of individual student data and integrity of the items and scoring materials. In addition, Contractor's electronic data collection, storage, and transmittal systems and any electronic systems used in scoring must be sufficiently protected from natural disaster.

Contractor will complete the scoring of all assessments administered online (including selected response, constructed response, performance and technology items) within a ten-business-day turnaround to support electronic reporting of individual student results to school districts as described herein. Student responses will be available to Contractor for scoring immediately upon the close of the school district's identified testing window. The scoring/reporting turnaround time begins when the school district submits student responses for scoring.

Contractor's scoring processes shall allow remote access by VIDE to view and run specific reports at any time during the scoring process, and/or participate in scoring, and/or monitor scorers, as desired. VIDE shall also have the right to visit Contractor's scoring facilities and attend all training sessions for scorers and scoring sessions.

x. Psychometrics

Contractor will provide pertinent, technical documentation of the contractor-provided services to support subsequent peer review. Additionally, Contractor will deliver an annual technical report that includes, but not necessarily limited to details addressing:

- Test blueprint and specifications;
- Item development and assessment construction processes;
- Field testing procedures, sampling methodologies, and resulting data;
- Scaling and equating methodologies;
- Information pertaining to content and bias reviews;
- Item statistics;

- Reliability and validity measures; and
- Quantitative and qualitative readability indices

Contractor will provide all psychometric leadership and support necessary to complete any required item reviews, field testing, test form selection, scoring, and reporting as required herein. In addition to the psychometric services required herein, the contractor shall provide the following specific research services:

- Contractor will provide evidence of validity of any allowable accommodations.
- Contractor will provide reliability assurances and documentation on content validity of the assessments.

Select states may require Contractor to collaborate with designated third-party psychometric consultant in verifying annual administration results.

- Contractor will provide technical documentation that interim assessments are predictive of student performance on statewide summative assessments.

{*VIDE SA*} psychometric support needed from the contractor beyond peer review documentation. This includes contractor staff coordination with *VIDE* staff and contractor staff development of materials for the tasks described for the Smarter Balanced tests as well as contractor staff attendance at {*VIDE SA*} meetings. This includes:

- Data Review
- Test form build evaluation
- Support for alignment to psychometric considerations and test blueprint alignment
- Post administration data review of field test items
- Weekly {*VIDE SA*} meetings
- ad hoc meetings, as needed

### **Scaling**

For {*VIDE SA*}, Contractor will scale selected response items and performance items together using approved models. Scaling shall result in a single score reflecting student performance relative to the standards reflected in the applicable test blueprint.

Contractor will provide a scale for all assessments that allows comparison of student performance over time and across grade levels. The scale must be sufficiently sensitive to allow determination of growth from one grade level to the next.

### **Technical Reporting**

Technical reports will be required for each administration year. The contractor's technical report shall provide details of the current year's participant data and item statistics, the contractor's unique administration and scoring procedures, and, where applicable procedures for determining achievement level descriptors, or a synopsis of earlier determination of applicable achievement level descriptors. The technical report must include a narrative description of test selection (where applicable), as well as data to support the technical integrity of the assessments.

A first draft of this report shall be delivered to *VIDE* each administration year, no later than October 1 following the assessment. Intentions are to have a final, comprehensive draft, inclusive of other annual testing activities, available for review and approval the January following administration.

At a minimum, Contractor's technical reports must provide all technical data consistent with the *State's Guide to the U.S. Department of Education's Assessment Peer Review Process* of the U.S. Department of Education and *The Standards for Educational and Psychological Testing*, published jointly in 2014 by the American Educational Research Association, the American Psychological Association, and the National Council on Measurement in Education, and any subsequent revisions. Specific technical information shall include:

- Determination that decisions based on the results of the assessments are consistent with the purposes for which they were designed;
- Determination that item interrelationships are consistent with the test's framework;
- Determination that the test and item scores are related to internal or external variables as intended;
- Documentation of consistent conditional standard error of measurement and student classification at each achievement level;
- Evidence of generalizability for all relevant sources, including variability of groups, internal consistency of item responses, variability among schools, consistency from test form to test form, and inter-rater consistency in scoring;
- Documentation that accommodations for students with disabilities yield valid and reliable scores;
- Documentation that accommodations for English Language Learners yield valid and reliable scores;
- Documentation of steps to ensure fairness in development of assessments (to include bias review, differential item functioning analysis, and impact statistics) relative to all subgroups;
- Documentation of consistency of test forms over time;
- Documentation of consistency in scoring of assessment items;
- Technical support for combining scores of students with disabilities who have been administered assessments with accommodations with those of students who have taken the assessments under standard conditions; and
- Technical support for combining scores of English Language Learners who have been administered assessments with accommodations with those of students who have taken the assessments under standard conditions.

By December 1, Contractor will provide the state with an electronic copy of the technical report for the previous year's test administrations. VIDE and other third parties will review and provide feedback and subsequent approval of a final document. The approved technical report will be delivered in a format ready for web posting (preferable format is Adobe PDF).

Each year of the contract, Contractor shall update the Technical Requirements document on a similar timeline, with the exception of the final year of the contract where Contractor must have an approved technical report delivered no later than December 31.

xi. Reporting

Contractor shall provide electronic versions of individual student reports (ISRs) to convey student performance for all assessments. All reports shall be tailored to VIDE requirements.

For all assessments, the individual student reports would be expected to include, at a minimum, scale scores, achievement levels, achievement level descriptors, and a standard error of measurement around scale scores. A Bidder's proposed reporting should



also identify the components of their score reporting system that are configurable, including features that could be included in reports that are not listed above. Bidders should also confirm that all text used in reports are configurable within any technical/character-count limitations that would be required by VIDE.

Bidder's proposal for science ISRs must provide two responses:

- (1) Bidder's proprietary system detailing how it will address VIDE's requirements and needs, and
- (2) Integration with the Smarter Balanced open-source system (consistent with reporting ELA and math) detailing how the Bidder will implement the specification detailed in Exhibit G, of the main RFP document.

Reports for {*VIDE SA*} are slightly different than the Smarter Balanced tests. Contractors should be familiar with the components of existing {*VIDE SA*} reports, when they are available, online at <http://www.k12.wa.us/assessment/StateTesting/ScoreReport.aspx>. Vendor reporting systems should be flexible enough to support reporting of different content areas and grades in similar ways.

One specific note is that standard error of measures are not calculated or reported for the {*VIDE SA*}.

Bidders are to include specifics on the risks and benefits of each solution and corresponding costs of implementation. Proposals that do not provide information on implementation of the Smarter Balanced system (only provides a proprietary solution) will be considered non-responsive bids.

Bidder's solution must demonstrate the flexibility to account for varying content details, both in terms of layout, content, and text.

By no later than October 1 of each school year, the contractor must provide mock-ups of the individual student reports for all assessments to VIDE for review. The contractor shall modify the mock-ups as directed by VIDE. VIDE will have three months or up to one month prior to the start of testing of a specific assessment, whichever is first, to review, edit, and approve changes to a specific assessment report.

### **General Research File and Biographic File**

Contractor shall provide VIDE with a General Research File (GRF) following each assessment administration window. Contractor shall provide GRFs for the Fall administration windows within ten (10) business days of the end of the window; the contractor shall provide final GRFs for Spring assessments by July 1 (or preceding business day if July 1 falls on a weekend). Data shall be in a fixed record length text file or comma separated value (CSV) file. Data shall be provided in accordance with the jurisdiction agency's approved data specifications document as described herein.

In addition to the GRF, annually by June 7 (or the preceding business day if June 7 falls on a weekend), Contractor shall provide a biographic file for the entire administration year following the spring administration.

### **Individual Student (Score) Reports**

Following each operational administration of science, Contractor shall fulfill reporting activities in accordance with the requirements described herein. Contractor shall provide reports using scale scores, cut points, and achievement level descriptors provided by VIDE.

A proposal will include estimates for providing reports intended for student families to be translated into the languages identified by VIDE. Refer to Exhibit Ga of the main RFP document for language choices. As the contract unfolds, Contractor acknowledges that additional languages may be added to the list of translated reports. Additionally, Contractor acknowledges that modifications to the report may be requested by VIDE and will be implemented.

**School / District Score Reports**

Contractor shall provide electronic district- and school-level reports plus individual student reports to convey student performance for all assessments. All reports shall be tailored to VIDE's complete assessment system.

For all assessments, Contractor shall return electronic individual student reports to schools within ten (10) business days of receipt of the school's completed (scoreable) testing materials. In addition, Contractor shall return two print copies of individual student reports including the student's identifying information, scale score, and achievement level to schools within ten (10) business days of Contractor's delivery of electronic individual student reports to the schools.

Contractor will provide print copy of all school- and district-level reports.

A proposal will address the provision of test score interpretive guides for all applicable assessments.

**Parent request to view**

Contractor will support VIDE needs in granting parents/guardians access to view applicable student records consistent with FERPA. Contractor will devise processes to present, upon request, student responses to administered tests for parent review. The jurisdiction will approve all proposed processes and will work with Contractor to devise an accompanying timeline to fulfill viewing requests.

Subsequent to the viewing process, parents/guardians may submit an appeal of the resulting score to which Contractor and jurisdiction will need to be responsive (refer to next section).

**Parent Score appeals**

Score Appeal Process - Contractor shall provide a process for allowing parents, through communication with the school district, to appeal assessment results within two months of the school districts' receipt of individual student results. Contractor shall determine the results of appeals and return the results of appeals to the school district and the member agency within 15 business days of Contractor's receipt of the appeal request.

A proposal will address a Bidder's solution to provide an online application for districts to use with parents to submit requests to view tests and test score appeal requests.

**2.4 Supporting Contract Services**

**2.4.A Meetings**

**i. Planning/Kick-Off**

By no later than seven (7) calendar days after the effective date of the contract, Contractor shall schedule and attend a meeting in a city designated by VIDE. The meeting will include

agency personnel and other designees, as determined by VIDE, to discuss the required services, review Contractor's work plan and implementation schedule, and obtain specific information, data, criteria, and/or instructions necessary to finalize the contractor's work plan as submitted in the contractor's awarded proposal.

### ii. Annual Coordination/Planning

Contractor will convene an annual meeting for VIDE to work through contract fulfillment coordination and scope of work modifications or enhancements. Meeting will be a one-day activity in VIDE. Attendance will be for no more than ten (10) VIDE staff and all related costs for attendance will be the responsibility of Contractor.

{*VIDE SA*} development has additional contractor, VIDE staff, and educator meetings. Meetings include pre-meeting work by the vendor in consultation with VIDE staff, coordination of the meeting details and attendees, facilitation of the actual meeting, and post-meeting activities that prepare the items and systems for the next meeting. These tasks necessitate continuous back-and-forth coordination, communication, and collaboration between vendor staff and VIDE staff. All these require excellent project management and schedule development. VIDE staff have developed guidelines for these meetings that vendors are expected to adhere to, and these will be provided to the vendor during a kick-off or contract-start meeting.

- Stimulus and Item Development

In preparation of a Stimulus and Item Development meeting, the vendor develops and proposes an outline that includes the PE or PE bundle for each cluster, a phenomenon or design problem, and an outline of no fewer than 6 items per cluster. Contractor will convene Stimulus and Item Development meetings to include VIDE staff, contractor staff, and educators from VIDE. Proposal should include one meeting for grade 5, one for grade 8, and one for grade 11 each year of the contract. Stimulus and Item Development meetings are typically one week and include approximately 15 educators per grade level.

- Content Review

Contractor will convene Content Review meetings to include VIDE staff, contractor staff, and educators from VIDE. Proposal should include one meeting for grade 5, one for grade 8, and two for grade 11 each year of the contract. Content Review meetings are typically one week and include approximately 5 educators per grade level.

- Data Review

Contractor will convene Data Review meetings to include VIDE staff, contractor staff, and educators from VIDE. Proposal should include one meeting for grade 5, one for grade 8, and one for grade 11 each year of the contract. Data Review meetings are typically one-two days and include 5 educators per grade level.

- Rangefinding

Contractor will convene Rangefinding meetings to include VIDE staff, contractor staff, and educators from VIDE. Proposal should include one meeting for grade 5, one for grade 8, and one for grade 11 each year of the contract. Rangefinding meetings are typically one week and include 5 educators per grade level.

- Bias and Sensitivity

Contractor will convene Bias and Sensitivity meetings to include an VIDE observer, contractor staff, and non-educator participants from VIDE. Proposal should include one meeting for grade 5, 8, and 11 combined each year of the contract. Bias and Sensitivity meetings are typically 2 to 3 days and include 5 non-educator participants.

- Achievement Level Setting

Achievement Levels were set in August 2018. Proposals should include a single meeting during the life of the contract to revisit the achievement level setting outcomes to include VIDE staff, contractor staff, and educators from VIDE. Achievement Level Setting was a three-day event with 30 educators per grade (5, 8, 11). Proposals for revisiting the standard setting meeting should include options for variable numbers of days (maximum 3) and a variable number of educators per grade (maximum 30).

2.4.B Logistical Requirements – Meetings

VIDE staff will provide meeting logistic documentation to the contractor in preparation of the {VIDE SA}-specific meetings described above. For each meeting, VIDE recruits educators and provides names for the vendor to coordinate the educators' travel, hotel, meals, etc. Vendor will provide reimbursement for participants per agency prescribed guidelines. During the school year, educators will receive substitute reimbursement from the vendor. Outside of the school year, educators are eligible to receive a stipend of up to \$200 per day.

All meeting logistics will be coordinated and arranged by vendor, per VIDE direction and guidelines. Meeting details will be provided in writing to VIDE staff by vendor staff for review, input, and approval.

Contractor will collaborate with states to determine dates, means, and, if necessary, locations to convene specific meetings. If appropriate for the purpose, and with state agency approval, the Contractor may conduct virtual meetings via WebEx or other similar platform. The Contractor shall secure appropriate facilities and equipment for the meetings, arrange necessary meals and refreshments for the meetings, and arrange participants' lodging. As part of the meeting arrangements, the Contractor shall be responsible for all facility costs, participant meals, travel, and lodging expenses. If participant honorarium are involved, the Contractor will be financially responsible (For bidding purposes, Exhibit xx details the meetings with anticipated honorariums).

The Contractor will reimburse participants according to either state or federal guidelines; however, the contractor should determine reimbursement guidelines to provide the most cost effective solution for the state agency. The Contractor shall provide any necessary materials required for the meeting.

The Contractor shall be responsible for all expenses, including travel expenses, incurred by the Contractor's personnel to attend or participate in all meetings.

The Contractor shall electronically post, as applicable, all meeting-specific and supplemental materials for review by the state agency, before and after each meeting, in Adobe PDF, Microsoft Word, or Microsoft Excel format to a secure FTP site or Cloud server according to mutually agreed upon specifications and timelines.

2.4.D Inventory of Student Responses and Supporting Documentation

For the duration of the contract, the contractor shall maintain an electronic copy of all supporting documentation related to any development, review, and field-testing of test items including but not limited to field-test statistics, demographics of the personnel involved in item reviews, training materials, and agendas applicable to all assessments. Upon request, the contractor shall provide the state agency with a copy of any such documentation. Retention requirements for student responses are established by VIDE.

3. MANAGEMENT PROPOSAL (SCORED)

3.1. Project Management

3.1.A Project Team Structure/Internal Controls

Provide a description of the proposed project team structure and internal controls to be used during the course of the project, including any subcontractors. Provide an organizational chart of your firm indicating lines of authority for personnel involved in performance of this potential contract and relationships of this staff to other programs or functions of the firm. This chart must also show lines of authority to the next senior level of management. Include who within the firm will have prime responsibility and final authority for the work.

In order for VIDE to feel confident with the Bidder it is important to understand the Bidder's corporate culture. A project of this scale and complexity will require the Bidder to be nimble, knowledgeable, available and empowered. It is critical that Bidders have a team based for easy engagement with VIDE, and who have the authority to identify problems or issues and address them quickly and creatively.

- Describe to what extent the Bidder's Program Manager (PM) will be empowered to authorize and execute change orders, make decisions, engage additional resources and execute on creative solutions to unusual or unforeseen problems.

3.1.B Work Schedule

Soliciting agencies expect maintenance of a project timeline through use of common, available project software (e.g., MS Project). Bidder shall maintain an appropriate schedule and timeline, and shall coordinate its schedule with the soliciting agencies on no less than a weekly basis. If awarded a contract, contractor shall sponsor an annual planning meeting of contractor and soliciting agency staff to establish schedules for the upcoming year.

3.1.C Program Coordination

Contractor will propose, and cost accordingly, designation of a 1.0 FTE Program Manager to VIDE to oversee work pertaining to the applicable state's assessment needs. The Program Manager shall serve as the primary liaison between Contractor and VIDE. The Program Manager will also serve as Contractor's designated customer service representative, ensuring that school districts receive quick and accurate responses to questions, requests, or concerns.

The proposed Program Manager must have the authority necessary to coordinate and establish work priorities on behalf of Contractor, for all assigned personnel, including those of any sub-contractors, associated with tasks on the assessment program.

In addition to a Program Manager, Contractor will designate, at a minimum, the following lead staff assigned specifically to the project/contract:

- Test Development Specialist (as applicable to the content areas the contractor holds responsibility) – Responsibilities shall include, but not be limited to, overseeing item review and other test development activities.
- Psychometrician – Duties shall include, but not be limited to, assisting with technical aspects of achievement level setting and item development, field testing, compiling item statistics, scaling and equating, and developing technical reports.

- iii. Performance Scoring Supervisor - Duties shall include oversight of all hand-scoring and automated electronic scoring including, but not limited to, selection of scorers, score reconciliation, and quality control of performance scoring.
- iv. Information Technology Specialist -- Duties shall include, but not be limited to, oversight of the contractor's online administration platform, set-up and delivery of the GRF, set-up and delivery of the online pre-coding and enrollment system, and collaborating with the state agency to ensure application of the state agency's approved data specifications document.
- v. Customer Service Supervisor -- Duties shall include, but not be limited to, oversight of the contractor's customer support relative to the state's assessment program; providing responses to state school districts before, during, and after operational test administration; coordination assistance to school districts with regard to interim assessments and pretests; and providing accurate information to program staff, the state agency, and school districts.

In addition to the staff identified for the math and ELA assessments, Contractor will designate the following staff assigned specifically to the {VIDE SA} project/contract:

Science Content Development Lead –

Duties shall include, but not be limited to, project management and facilitation of all aspects of item development, facilitating VIDE access to vendor staff during item development, and provide support for the science content specialist to ensure item development quality and that timelines are met.

Science Content Specialist –

Duties shall include, but are not limited to, reviewing and providing input to VIDE staff on stimuli and items developed both pre- and post-Stimulus and Item development and both pre- and post-Content Review, providing support for rangefinding and rubric validation, attending {VIDE SA} development meetings, and attending weekly meetings.

If Contractor secures subcontractors to perform any work related to developing, administering, scoring, or reporting of assessments, Contractor shall provide an effective supervisory structure for overseeing the quality of the subcontractor's work and shall ensure that all deliverables are completed in accordance with the requirements of the contract and the approved Implementation Schedule.

Contractor will not remove or reassign key personnel from duties pertaining to the contract without prior approval from the state agency. In the event that any key personnel become unavailable to provide services due to resignation, illness, or other factors outside Contractor's reasonable control, Contractor will propose an equally or better qualified individual to the state in time to avoid delays in the work plan. Contractor will give the state prior written notice of the individual proposed to replace the designated key personnel and will provide the state with the individual's qualifications and background. Contractor will obtain the state's prior approval of such individual. The state agrees that an approval of such replacement individual will not be unreasonably withheld. The state's approval of the replacement individual shall not be construed as an acceptance of the individual's performance potential.

With a proposal submission, Contractor understand that designated personnel are subject to the approval of VIDE. If requested by VIDE, Contractor will replace any individual who is deemed unacceptable for continuance in serving the contract.

Additionally, VIDE retains discretion to negotiate the final FTE amounts for designated roles under the scope any contract award. VIDE shall approve any personnel changes in the roles designated above.

Contractor will provide a structure for escalating unresolved issues if Contractor's program management team is unable to address them to the satisfaction of the state.

Contractor will assign sufficient program personnel to provide accurate, efficient customer service to both state agency personnel and school district personnel. Contractor will provide a toll-free number and e-mail address through which school district personnel may direct questions, comments, or requests, especially immediately prior to and during the testing windows. Contractor will ensure that the toll-free customer service number is dedicated to the state and is available and staffed from 6:00 a.m. to 5:00 p.m. (applicable to the time zone of the state) one month before and during all testing windows. The contractor shall provide the state with a monthly log of calls to the customer service line, issues, and resolutions. Contractor shall also provide a password protected FTP site or virtual "conversation room" to allow state personnel and Contractor a secure forum for interaction and exchange of materials.

By June 1 of each year, Contractor shall provide the state with a year-long calendar (Implementation Schedule) including all deliverables, milestones, review dates, and responsible parties for the upcoming school-year administration activities. Contractor will update the calendar upon state request and as needed to accommodate schedule revisions.

Contractor will designate appropriate personnel to participate in weekly conference calls with state personnel. Contractor's Program Manager and state personnel will collaborate to develop a mutually agreed upon agenda for the conference calls. Contractor will be responsible for scheduling and setting up the conference calls and any costs associated with the conference call.

Except for Contractor's initial meeting with the state following the effective date of the contract and the regularly scheduled weekly conference calls, the state will make requests to Contractor for other meetings and conference calls between the contractor and state, and any other designees of the state such as third-party consultants or constituents. Contractor will coordinate the meetings and will be responsible for all expenses, including travel expenses, realized by those attending or participating in such meetings or conference calls.

### 3.1.D Staff Qualifications/Experience

Identify staff, including subcontractors, who will be assigned to the potential contract, indicating the responsibilities and qualifications of such personnel, and include the amount of time each will be assigned to the project. Provide resumes for the named staff, which include information on the individual's particular skills related to this project, education, experience, significant accomplishments and any other pertinent information. The Bidder must commit that staff identified in its proposal will actually perform the assigned work. Any staff substitution must have the prior approval of the states, party to corresponding contracts.

i. Roles and Responsibilities

Bidder will detail the specific roles required to fulfill the project and the responsibilities associated with the various project tasks. Details will encompass not only direct work responsibilities but also the interfaces with other defined roles in moving the project through a given task or from one task to the next. Additionally, client interfaces will be identified where the Bidder expects soliciting agencies to be involved or assume responsibility in a given task. Intent is to understand the “chain of custody” for a task and identify where communication is critical to ensure smooth transitions across work groups, contractors, and soliciting agencies.

Additionally, Bidder will provide a chart listing time commitments by task and individual, in terms of actual hours required, dates (schedule time), and percentage of FTE provided as part of the project work. The intent is for soliciting agencies to understand the expectation of each individual’s time commitment to the project and the Bidder’s interpretation of the personnel resource commitment anticipated to support the scope of work for the project.

Bidder must provide a detailed description of its project staffing plan for all phases and tasks (any proposed subcontractors must be clearly identified in the project staffing plan), as well as an organizational chart clearly showing the structure showing the interplay of the Agency team and the upstream reporting structure of the Bidder’s organization. The chart must accurately portray the positions, title and role in the project, including responsibilities. It is our desire that this team be entirely dedicated to the Project. If any personnel are assigned to other customers, territories or markets, those must be clearly noted on the chart.

Bidder must provide a flowchart outlining its change order process and any thresholds for escalation and approval above the PM.

Experience and reliability of the Bidder’s organization will be considered subjectively in the evaluation process. Therefore, the Bidder is advised to submit information concerning the Bidder’s organization and information documenting the Bidder’s experience in past performances, especially in the development, administration, and scoring of statewide assessments in online format. If the Bidder is proposing an entity other than the Bidder to perform the required services, the Bidder should also submit the information requested for such proposed subcontractor.

- Bidder Information – The Bidder should provide information about the Bidder’s organization. The Bidder should also provide the requested information for each proposed subcontractor.
- Experience – The Bidder should provide information related to the Bidder’s previous and current services/contracts where performance was similar to the required services of this RFP. The Bidder should also provide the requested information for each proposed subcontractor.

As part of the evaluation process, the state agency may contact the Bidder’s and the proposed subcontractors’ references, including references not listed or identified within the Bidder’s proposal but who have current or previous experiences with the Bidder or with the proposed subcontractor.

The Bidder shall agree and understand that the state agency is not obligated to contact the Bidder’s or the proposed subcontractors’ references.



ii. Qualifications of Personnel

An in-state experienced, qualified, and effective project team will be identified and provided by the Bidder. Provide resumes for all employees who will be managing and/or directly providing services under the contract. For positions that are not filled, a position description (including requisite qualifications/experience) shall be provided. Each Bidder must also complete and submit a complete staffing matrix detailing previous assignments of identified personnel on similar projects. Details should display FTE and roles, even when promoted. At a minimum, the Contractor will maintain a dedicated in-state management team for the length of the project.

The qualifications of the personnel proposed by the Bidder to perform the requirements of this RFP, whether from the Bidder's organization or from a proposed subcontractor, will be subjectively evaluated. Therefore, the Bidder should submit detailed information related to the experience and qualifications, including education and training, of proposed personnel, in the development, administration, and scoring of large scale statewide assessments in online.

**Personnel Expertise**

The Bidder should at a minimum provide information for the proposed Program Manager, Test Development Specialist, Content Specialist, Psychometrician, Information Technology Specialist, Performance Scoring Supervisor, Customer Service Supervisor, and all other key personnel proposed to provide the services required herein. If additional personnel resources are available, the Bidder may provide information for such personnel.

- The information provided should be structured to emphasize relevant qualifications and experience of the personnel in completing contracts/performing services of a similar size and scope to the requirements of this RFP.
- The information submitted should clearly identify previous experience of the person in performing similar services and should include beginning and ending dates, a description of the role of the person in such performances, results of the services performed, and whether the person is proposed for the same services for this project.

**Personnel Qualifications**

If personnel are not yet hired, the Bidder should provide detailed descriptions of the required employment qualifications; and detailed job descriptions of the position to be filled, including the type of person proposed to be hired.

3.2 Experience of the Vendor

- A. Include other relevant experience that indicates the qualifications of the Vendor, and any subcontractors, for the performance of the potential contract.
- B. Include a list of contracts the Vendor has had during the last five (5) years that relate to the Vendor's ability to perform the services needed under this RFP. List contract reference numbers, contract period of performance, contact persons, telephone numbers, and fax numbers/e-mail addresses.

**C. References**

List names, addresses, telephone numbers, and fax numbers/email addresses of three (3) business references for whom work has been accomplished and briefly describe the type of service provided for them. By submitting a proposal in response to this RFP, the vendor and team members grant permission to partner states to contact these references and others, who from partner state's perspective, may have pertinent information. Partner states may or may not contact these references or others. Do not include as references current partner staff that act as points of contact to existing contracts held by the Bidder.

**4. COST PROPOSAL (SCORED)**

Identification of Costs – all costs including expenses to be charged for performing the services necessary to accomplish the objectives of the contract. The Bidder is to submit a fully detailed budget including staff costs, administrative costs, travel costs, and any other expenses necessary to accomplish the tasks and to produce the deliverables under the contract. Contractors are required to collect and pay U.S. Virgin Islands sales tax, if applicable.

Use the format established in Exhibit K of the main RFP document to respond to the Cost Proposal of this RFP. Costs for subcontractors are to be broken out separately and elements of the Bidder's proposal must be itemized per the prescribed submission format. Altering the format may cause the Cost Proposal to be found non-responsive.

Bidder's Cost Proposal must be fully burdened to include all expenses associated with providing its proposed solution in response to this RFP (e.g., FOB Destination applicable school site, unpacking devices, removal of packaging materials from site, etc.). The service should be complete with all hardware and components of the solution while maintaining and upgrading the system as necessary, managing the deployment, asset tracking, help desk support, providing training, deploying and managing the infrastructure, providing professional development at multiple levels, and project management as described in this RFP.

The fully burdened, fixed cost is to include all operating and personnel costs such as (but not limited to) overhead, salaries, administrative expenses, profit, supplies, routine upgrades, maintenance, tech support, replacement, travel and travel costs, training, install, any and all tax liability (including any applicable property taxes) incurred as a result of providing the services and equipment under this RFP.

Bidders are advised that submission of additional information in support of the Cost Proposal is encouraged to the extent that such information will assist in evaluating the reasonableness and rationale supporting the costs.

Section D. EVALUATION AND CONTRACT AWARD

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1. EVALUATION PROCEDURE

Responsive proposals will be evaluated strictly in accordance with the requirements stated in this RFP and any addenda issued. VIDE will conduct its own evaluations of the scope of work referenced in this appendix, separate from the common scope of work held between the MAAC participants.

**All costs for submitting a response to this RFP shall be the sole responsibility of the Proposer.**

Proposals will be required to meet a set of mandatory prerequisites to be eligible for full evaluation. Proposals not meeting the prerequisites will be considered non-responsive and excluded from further review. Eligible proposals will be evaluated using the criteria included in this appendix (refer to Exhibit USVI-1A) leading to a ranking of each according to the scoring outlined below. The points awarded during evaluation will be used in the determination of selection of potential contractor(s).

Total points possible would be 150.

2. EVALUATION WEIGHTING AND SCORING

The following points will be assigned to the proposals for evaluation purposes:

<b>Technical Proposal – 60%</b>		<b>90 points</b>
Project Approach/Methodology	20 points (maximum)	
Quality of Work Plan	35 points (maximum)	
Project Schedule	15 points (maximum)	
Project Deliverables	20 points (maximum)	
<b>Management Proposal – 20%</b>		<b>30 points</b>
Project Team Structure/Internal Controls	15 points (maximum)	
Staff Qualifications/Experience	10 points (maximum)	
Reference Checks	5 points (maximum)	
<b>Cost Proposal – 20%</b>		<b>30 points</b>
<b>GRAND TOTAL FOR PROPOSAL</b>		<b>150 points</b>

3. NOTIFICATION TO BIDDERS

Proposals that have not been selected for further negotiation or award will be notified via email by the RFP Coordinator.

#### 4. SELECTION OF APPARENT SUCCESSFUL CONTRACTOR

Award, if one is made, will be made to the highest ranked Bidder, or, if VIDE determines it is in the agency's best interest, to a top-ranked Bidder representing the fullest range of services sought under this RFP. Points from the proposal evaluation process will not alone determine the selection of a vendor, but will be considered along with all of the information provided by the Bidders including references and written supplements to proposals requested through the evaluation process.

VIDE will enter into negotiations with the highest ranked Bidder with verifiable references. References for the highest ranked Bidder may be contacted to verify each Bidder has the skills and requirements Bidder has included in its proposal.

VIDE may choose to not award a contract. In the event contract negotiations with the highest ranked Bidder are not successful within a reasonable time frame, VIDE reserves the right to terminate negotiations with the highest ranked Bidder, and negotiate with the next highest ranked Bidder and so on, until successful negotiations are completed or VIDE decides to terminate all negotiations and cancel the solicitation. The determination of what constitutes a reasonable time frame for purposes of this paragraph shall be solely at the determination of VIDE. This protocol will be followed until a contract has been signed. If all Proposals are rejected, Bidders will be promptly notified.

VIDE reserves the right to modify the final scope of work used for contracting, keeping to the objectives of the original scope, so each member can avail itself of innovations, ideas, recommendations, or procedures to complete the designated services in a more efficient or effective manner.

#### **Disqualification**

Any attempt by a Bidder to influence a member of the evaluation committee during the proposal review and evaluation process will result in the elimination of that Bidder's proposal from consideration.

#### 6. DEBRIEFING OF UNSUCCESSFUL BIDDERS

Upon request, an individual debriefing conference will be scheduled with an unsuccessful Bidder. The request for a debriefing conference must be received by the RFP Coordinator within three (3) business days after the Notification of Unsuccessful Bidder letter or e-mail is sent to the Bidder. The debriefing must be held within three (3) business days of the request, unless otherwise agreed upon by the RFP Coordinator and Proposer.

Discussion will be limited to a critique of the requesting Bidder's proposal. Comparisons between proposals or evaluations of the other proposals will not be allowed. Debriefing conferences may be conducted in person or on the telephone and will be scheduled for a maximum of thirty (30) minutes.

#### 7. PROTEST PROCEDURE

This protest procedure is available to Bidders who submitted a response to this RFP document and who have participated in a debriefing conference. Upon completion of the debriefing conference, the Bidder is allowed three (3) business days to file a protest of the acquisition with the RFP Coordinator. Protests may be submitted by fax or email, but should be followed by a hard copy document.

Bidders protesting this procurement shall follow the procedures described below. Protests that do not follow these procedures shall not be considered. This protest procedure constitutes the sole administrative remedy available to Bidders under this procurement.

## Appendix USVI-1

All protests must be in writing and signed by the protesting party or an authorized Agent. The protest must state the grounds for the protest including specific facts and complete statements of the action(s) being protested. The protesting party may submit with the protest any documents or information deemed relevant. A description of the relief or corrective action being requested should also be included. All protests shall be addressed to the RFP Coordinator.

Only protests stipulating an issue of fact concerning the following subjects shall be considered:

- A matter of bias, discrimination or conflict of interest on the part of the evaluator/evaluation team;
- Errors in computing the score; and/or
- Non-compliance with procedures described in the procurement document or soliciting agency's policy.

Protests not based on procedural matters will not be considered. Protests will be rejected as without merit if they address issues such as: 1) an evaluator's professional judgment on the quality of a proposal, 2) soliciting agency's assessment of its own and/or other agencies needs or requirements, or 3) a complaint raised during the Complaint Procedure.

Upon receipt of a protest, a protest review will be held by soliciting agencies. Each impacted agency will appoint a staff member who was not involved in the procurement to consider the record and all available facts and issue a decision within ten (10) business days of receipt of the protest. If additional time is required, the protesting party will be notified.

In the event a protest may affect the interest of another Bidder that submitted a proposal, such Bidder will be given an opportunity to submit its views and any relevant information on the protest to the RFP Coordinator.

The final determination of the protest shall:

- Find the protest lacking in merit and uphold soliciting agency's action; or
- Find only technical or harmless errors in soliciting agency's acquisition process and determine soliciting agency to be in substantial compliance and reject the protest; or
- Find merit in the protest and provide soliciting agency options which may include:
  - Correct the errors and re-evaluate all proposals, and/or
  - Reissue the RFP document and begin a new process, or
  - Make other findings and determine other courses of action as appropriate.

If soliciting agencies determine that the protest is without merit, the state agency of record will enter into a contract with the Apparent Successful Contractor. If the protest is determined to have merit, one of the alternatives noted in the preceding paragraph will be taken.

EXHIBIT USVI-1A  
Proposal Evaluation Criteria

**RFP Evaluation Criteria and Rating System**

Rate each of the following criteria as follows: E – demonstrates excellent evidence of criterion; G – demonstrates good evidence of criterion; A – demonstrates adequate evidence of criterion; M – demonstrates minimal evidence of criterion; N demonstrates no evidence of criterion; NA – not applicable. The number of points associated with each rating is given beside the criterion.

**Technical Proposal (maximum 90 points)**

<i>Criteria</i>	E	G	A	M	N	NA
BIDDER provides a clear and specific outline of its methods/approaches to accomplishing the objectives of the project.	20	15	10	5	0	
BIDDER provides a clear and specific plan for accomplishing the work associated with the project.	35	25	15	10	0	
BIDDER provides clear and specific details associated with a schedule for accomplishing the work of the project.	15	12	9	5	0	
BIDDER provides a complete and specific listing of deliverables associated with the objectives of the project.	20	15	10	5	0	

**Management Plan (maximum 30 points)**

<i>Criteria</i>	E	G	A	M	N	NA
BIDDER's project team and internal organizational structures and procedures speak to the capacity and ability to deliver on the project objectives.	15	12	9	5	0	
BIDDER's capacity and staffing experience speak to the capacity and ability to deliver on the project objectives.	10	8	6	3	0	
BIDDER's references provide appropriate level of insight to the Bidder's capacity and ability.		5			0	

**Cost Proposal (maximum 30 points)**

<i>Criteria</i>	E	G	A	M	N	NA
BIDDER's costing is consistent and appropriate to the objectives of the project and are judged appropriate to the work involved.	30	25	15	10	0	

*Evaluation of the Cost Proposal*

A total of 25 points will be awarded to the lowest of the three cost proposals, inclusive of all the separately bid components (refer to technical requirements). Proposals with higher costs will receive a fraction of 25 points proportional to the ratio of the lowest proposal cost to the respective higher cost proposed. The fractional value of points to be assigned will be rounded to one decimal place.

Example: Lowest acceptable cost was \$50,000 and receives 25 points. The next lowest acceptable cost proposal was \$75,000 and would receive 16.7 points  $\{(Low\ Bid \div High\ Bid) \times 25\}$ .