APPENDIX MT-2
EXHIBIT: OPI ALTERNATE MONTANA SCIENCE ASSESSMENT SOLICITATION
Amendment 01 (2/13/19)

SECTION A: INTRODUCTION

Unless otherwise specified the elements contained within the Multi-Agency Assessment Cooperative (MAAC) are also expected within this state-specific science alternate exhibit for the Office of Public Instruction (OPI).

This state-specific science alternate exhibit provides a description of the major tasks and activities to be performed by the test contractor (Contractor) for the successful completion of this project and provides information on contract deliverables. The Contractor's response must directly reference and address each of the tasks contained in this section. Of course, it is impossible to fully capture the complexity of the tasks and services required to administer a state assessment program in a proposal. Therefore, the Contractor's response must reflect an understanding of the basic demands and requirements for administering a state assessment program.

Bidders are encouraged to propose alternative methods or modifications to tasks or identify additional tasks that they feel are necessary or would improve the efficiency of the project and/or quality of the materials produced for the project.

A.1 Purpose

The Montana Office of Public Instruction (OPI) is requesting proposals related to the development and implementation of the Alternate Montana Science Assessment (AMSA). In accordance with the assessment requirements of the federal Every Student Succeeds Act (ESSA), the purpose of AMSA is to measure the performance of Montana's students with the most significant cognitive disabilities on the state's academic content standards in science – the Montana Content Standards for Science. AMSA must comply with all federal and state laws and regulations regarding the administration of alternate assessments. The "alternate" is an assessment developed from alternative academic achievement standards (AA-AAS) designed for students with significant cognitive disabilities.

To assist the department in meeting those requirements, the OPI is seeking proposals from Bidders who have demonstrated experience and success developing, administering, and maintaining large-scale state alternate assessment programs; and can demonstrate an understanding of the unique challenges and requirements associated with developing an alternate assessment in science.

The OPI is seeking a Contractor to assist OPI in (a) the annual administration of the Alternate Montana Science Assessment (AMSA) summative tests in science at grades 5, 8, and 11 (high school) and (b) manage the implementation of the AMSA. A more complete description of the services can be found below.

A.2 Funding

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

All funding for the OPI's alternate assessments come from the federal Office of Special Education Programs (OSEP) state grant. The OPI is seeking a fixed price contract for the AMSA. With limited funding

for the AMSA, the OPI encourages Bidders to provide their most favorable and competitive cost estimate to perform the work. Refer to the MAAC cost structures/pricing models for guidance on appropriate response to the cost for services.

Bidder must propose a budget that is cost effective and consistent with the state's history with projects of similar size and scope. Bidder must demonstrate the ability to employ sound fiscal management practices that meet or exceed standards of practice for the industry and in accordance with billing and reporting practices required by the state.

OPI acknowledges other scope items will have varying cost estimates based on the associated service specifications and volume of participating students. Any contract awarded as a result of this procurement is contingent upon the availability of funding.

Each MAAC member will have its own contract period commensurate with applicable state procurement practices, and where possible will allow for extension/renewal based upon original quoted terms. Bidders will provide cost proposals that support the full term stipulated in this RFP and a series of one-year terms to provide maximum flexibility for each of the MAAC members.

A.3 Contract Period

The period of performance of any contract resulting from this RFP is tentatively scheduled to begin on or about July 1, 2019 and end on or about December 31, 2022.

Date references included in the scope of work section consider the late contract start date and provide some leniency for year 1 (2019-2020) to acknowledge this. For future years, these dates are expected to move up at least one month earlier or upon an agreed upon date.

The option to extend any contract resulting from this procurement shall be at the sole discretion of the awarding organization. As such, awarding organizations that are party to any contract award reserve the right to extend the contract through amendment for individual years not to exceed a total of two (2) additional contract years 2023 and 2024, respectively.

Decisions to amend shall be based on sustained satisfactory performance as decided by the program management designee from each state that is party to this solicitation and any subsequent contract award, successful completion of project objectives, and availability of funding.

Additional services appropriate to the original scope of this RFP, or consistent with the intent of accepted practices in large-scale assessment or come as a result of legislative or regulatory mandate may be determined by awarding organizations for inclusion in the resulting contract by a written amendment mutually agreed to and executed by the parties affected by said contract.

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A.4 State Educational Assessment System

The AMSA Science will be administered annually to students in grades 5, 8, and 11 (high school) to students with the most significant cognitive disabilities. These tested grades mirror the general science population assessment. There are approximately 300 students total (or roughly 1%) across the three grades who participate in the AMSA.

Ensuring that all students, including those from non-dominant groups, have access to a high-quality and rigorous science education that prepares them for college, career, and citizenship is at the heart of the Framework and the Next Generation Science Standards (NGSS). This emphasis on student equity must extend to current efforts in assessments.

Given the structure of Montana's educational system, the OPI must work with its governing bodies to implement changes that are reasonable and responsive to the unique educational circumstances of Montana's K-12 public and accredited nonpublic schools. References are included in the Population section, Major Reference Document section, and the Goals and Theory of Action section.

The OPI assesses all public and accredited nonpublic schools in Montana per federal and state requirements (see ESSA Section 1111 and ARM 10.56.101). Currently, the OPI administers the CRT-Science Alternate at Grades 4, 8, and 10. For illustrative purposes, we have included Montana's student characteristics for Grades 4, 8, and 10, but for the purposes of this solicitation, the OPI is looking to assess at Grades 5, 8, and 11 (high school) as these grade-spans are better aligned to the performance expectations which were adopted by the Montana Board of Public Education in September of 2016. The three grade span options the general science assessment measures include Elementary (Grades 3-5), Middle School (Grades 6-9), and High School (Grades 10-12). For more details on our public and nonpublic school and student characteristics, visit the GEMS Student Characteristics Dashboard.

A.4.1 Overview

The AMSA is aligned to the NGSS not the Common Core State Standards. Montana's adopted science standards are highly comparable to the NGSS. However, Montana is considered a "Framework-aligned" adopter due to some minor performance expectation adaptions, augmentation, and focused expectations.

Montana has augmented the standards to include the cultural heritage of American Indians, in other places we have adapted the language to identify different intersections of the three-dimensions, or we have included language with specificity, and lastly, in some places, we have not adopted all available performance expectations (focused). The OPI historically has not adopted separate AA-AAS for mathematics, English language arts (ELA), or science. Through consortium work or contractor services the state as utilized AA-AAS developed for the purposes of summative assessment (see MSAA Technical Document as reference). The Multi-State Alternate Assessment (MSAA) is the assessment aligned to AA-AAS to the Common Core college- and career-ready standards for math and ELA in Montana's tested grades 3-8 and 11.

- The AMSA will be administered at grades 5, 8, and 11 (high school) not in the MSAA tested grades 3–8 and 11.

- The general science assessment {Montana Science Assessment (MSA)} is planned to be delivered during an earlier testing window which than the Washington science assessment.
- The MSA will be given from late February to early April. The AMSA should be given during a similar time window for commonality and consistency in test administration events.

To demonstrate the assessment is aligned to the Montana Content Standards for Science (ARM 10.53.8) or similar Framework-based standards like the NGSS, the statewide AMSA must inherently represent the three dimensions, be anchored with phenomena, have balance across the domains, varied complexity, and evidence of strong technical quality to support reliable and valid, meaningful interpretations of student performance.

Thus, maintaining the belief that the NGSS are for all students, the content and item specifications should be derived from alternate achievement standards developed to measure the multi-dimensions and scaffold across three different levels/access points. Science assessments need to be as authentic to students' instructional experience as possible, through the use of real-world phenomena and rich, interactive content.

The OPI is seeking a Contractor who can adhere to its timeline of field- and operational-ready testing through work such as having developed NGSS AA-AAS and subsequent content/item specifications illustrating strong alignment to the NGSS. An assessment at grades 5, 8, and 11 (high school) field-test ready by the spring 2020 and operational-ready by the spring 2021. OPI envisions a transition for its science assessments for all students at the same time, rather than have a lag in implementing the alternate assessment.

Similar to Montana's MSAA for math and ELA alternate assessments for grades 3-8 and 11, the AMSA should allow for similar interaction and score interpretations.

The MSAA serves three main purposes:
 (1) to measure student achievement;
 (2) to provide defensible scores for state accountability systems; and
 (3) to provide reporting structures that support appropriate interpretation and use of data.

The MSAA was designed to capture student performance at different levels of skill acquisition. The MSAA assessment is aligned to simplified and prioritized college- and career-ready standards called the Core Content Connectors. The assessment items incorporate important aspects of item design related to both varying levels of content complexity and the degree and type of scaffolds and supports. MSAA's intentional assessment development process addressed the targeted grade-level academic content linked to evidence-based curricular and instructional materials, and resulted in useful information for educators and families. Tasks will be administered by the teacher at a point determined by the teacher during an open testing window that runs throughout the spring. The OPI expects the AMSA to have similar purposes, design, and uses to have coherence across the alternate suite of assessments.

A.4.2 Population

Table 1. State and Student demographics

Student Characteristics Federal Race — Ethnicity	2017-2018
	State Counts
All Public School Students	146,772
American Indian or Alaskan Native	16,293
Asian	1,122
Black or African American	1,265
Hispanic	6,852
Multi-Racial	5,348
Native Hawaiian or Other Pacific Islander	337
White	115,554

A.4.2.1 Grade Configurations

Table 2. Montanan OPI Grade Tested Grade Characteristics

Tested Grade Type Description	2017–2018
	School Counts
All Science Public Tested Students	~33,500
By Grade—Grade 4 Counts	
All General Tested Grade 4 Students	~11,500
All Students Tested with Alternate*	~100
By Grade—Grade 8 Counts	
All General Tested Grade 8 Students	~11,000
All Students Tested with Alternate*	~100
By Grade—Grade 10 Counts	
All General Tested Grade 10 Students	~10,500
All Students Tested with Alternate*	~100

A.4.2.2 District Demographics

Table 3. Montana OPI District Characteristics

District Level	2017-2018
District Counts	
All Public Districts	401
EL	239
HS	100
K-12	60
NA	2

A.4.2.3 Major Reference Documents

In your response, cite specific sections from these major reference sources to indicate compliance with these major sets of standards and criteria. The codes are for your use to cite and reference.		

Code	Document	Available At
A	American Psychological Association, American Educational Research Organization, & National Council on Measurement in Education (2014). Standards for Educational and Psychological Testing	http://bit.ly/1iczJW
B	Shyyan, V. V., Thurlow, M. L., Larson, E. D., Christensen, L. L., & Lazarus, S. S. (2016). White paper on common accessibility language for states and assessment vendors	http://bit.ly/2flgHw
C	Council of Chief State School Officers (2014). Criteria for Procuring and Evaluating High-Quality Assessments	http://bit.ly/1PObv
D	Council of Chief State School Officers & Association of Test Publishers (2013). Operational Best Practices for Statewide Large-Scale Assessment Programs	http://bit.ly/2fllj5
E	Criteria for Procuring and Evaluating High Quality and Aligned Summative Science Assessments (2018). Achieve.	Click here.
F	Developing Assessments for the Next Generation Science Standards. (BOTA Report)	Click here.
G	Administrative Rules for Montana 10.56.101	Click here
H	Administrative Rules for Montana 10.53.5	Click here
I	Multi-State Alternate Assessment (or NCSC) Technical Document	Click here
J	Montana State Science Assessment System: Theory of Action	Click here.
K	Ensuring Rigor in State Assessment Systems: A Self-Evaluation Protocol	Click here.
L	Ensuring Rigor in Local Assessment Systems: A Self-Evaluation Protocol	Click here.
M	SAIC Assessment Framework. 14-member Science Assessment Item Collaborative (SAIC) sponsored by CCSSO.	Click here.
O	SAIC Item Specifications	Click here.
P	GEMS Student Characteristics Dashboard	Click here.
Q	Montana State ESSA Plan	Click here
R	Common Education Data Standards	Click here

Please review to Montana's state-specific exhibits for additional information on the following:

- Exhibit A: Member-Specific Certifications and Assurances;
- Exhibit B: Member-Specific General Terms and Conditions;
- Exhibit X: Montana Insurance Requirement;
- Exhibit C: Member-Specific Contractor Intake Form;
- Exhibit D: Proposal Checklist;
- Exhibit E: Member-Specific Statewide Registration Requirements;
- Exhibit F: This state-specific exhibit includes an appendix on this.
- Exhibit G: Member-Specific Translations;
- Exhibit H: MAAC Member-Specific Data Management Specifications;
- Exhibit I: MAAC Member-Specific Testing Alert & Score Appeals Processes;
- Exhibit XX: Member-Specific Record Retention;
- Exhibit K: Cost Proposal Submission Format;
- Exhibit L: Sample Data Sharing Agreement; and
- Exhibit N: Service Level Requirements and Remedies.

A.5 Goals and Theory of Action

In November 2017, the OPI established the Science Partner Task Force. Due to the limited resources and timeline for administering a new assessment by the spring of 2020 and to comply with the state's

negotiated rulemaking process, the Assessment Division convened a group of science leaders, both internally and externally, to provide recommendations for the statewide science assessment of student performance for accountability.

The OPI is working in collaboration with two other SEAs (the Wyoming Department of Education and the Nebraska Department of Education), four organizations (edCount, ACS Ventures, SRI International, and the Pacific Institute for Research & Evaluation (PIRE)), and a technical advisory panel of 10 experts that contribute an essential combination of expertise in principled-design, measurement, assessment literacy, and classroom practices to support the implementation of this project.

The Strengthening Claims-based Interpretations and Uses of Local and Large-scale Science Assessment Scores (SCILLSS) project is funded by the U.S. Department of Education's Enhanced Assessment Instruments Grant Program. The SCILLSS project aims to strengthen the knowledge base among stakeholders for using principled-design approaches to create and evaluate quality science assessments that generate meaningful and useful scores, and to establish a means for states to strengthen the meaning of statewide assessment results and to connect those results with local assessments in a complementary system.

Through the SCILLSS project the OPI has developed a Theory of Action (ToA) that demonstrates the claims and assumptions that must hold true to support the interpretation(s) and use(s) of assessment scores. Stakeholder involvement in the development and refinement of the Montana ToA was an essential consideration for ensuring the ToA articulates a common vision for science education in Montana and matches the state's unique circumstances and needs. Montana developed a ToA that articulates the characteristics and priorities of its state science assessment system in the context of the larger educational setting. These priorities are necessary for meeting its five desired outcomes:

1. Ensure Montana students have an increased interest in, engagement with, and participation in the MCS for science curriculum and the assessment system that measures their attainment of the defined knowledge, skills, and abilities.
2. Ensure Montana students become critical consumers of information. Apply and transfer MCS, 2016 for science learning to complex and novel situations thus demonstrating globally competitive skill sets necessary for postsecondary success.
3. Ensure Montana students are well prepared to enter postsecondary training and degree programs without remediation in science and can participate in postsecondary pursuits without accruing added remediation expenses to complete certification or degrees.
4. Ensure the Montana assessment system will provide student experiences that effectively integrate the three-dimensional nature of the MCS, 2016 for science in authentic and culturally-relevant context (Indian Education for All (MCA 20-1-501), place-based, and phenomena-driven).
5. Ensure the science assessment system that feeds the OPI accountability system will yield score results that are timely and informative to stakeholders at every level to help students make progress over time to address real-time learning gaps for intervention.

Visit the Theory of Action Narrative to learn more about the vision the OPI and its stakeholders have for statewide system of assessments for science.

As stated in the guiding ToA document and within the objectives of the SCILLSS's Enhanced Assessment Grant (of which Montana is a member), the OPI is seeking a Contractor to deliver the AMSA. The OPI's vision for a balanced science assessment system is product(s)/service(s) that include multiple measures to ensure the statewide assessment results relate to local assessments and instruction.

Assessment results must connect to local curriculum, instruction, and assessment in a coherent, complementary system designed to provide comprehensive coverage of the knowledge, skills, and abilities essential for college and workforce readiness and include score information that provides timely and actionable student performance data (score reports) that are accessible to a wide range of stakeholders.

For a statewide assessment to generate meaningful and useful scores for each stakeholder, the assessments must chart student progress over time, be coherent across grades, have a foundation of a standards-based system, and produce meaningful reports to support academic achievement in federal, state, and local reporting/intervention/goal-setting/local-educator data-driven decision making.

The OPI participates in the federally-mandated assessments, and, in addition to the federal requirements, the OPI has state administrative rules that govern our statewide assessments. ARM 10.56.101(2) states:

> "The board recognizes that the primary purpose of assessment is to serve learning. A balanced assessment system including formative, interim, and summative assessments aligned to state content standards will provide an integrated approach to meeting both classroom learning needs and school and state level information needs. A balanced assessment system is structured to continuously improve teaching and learning and to inform education policy."

As mentioned above, the OPI would like to replicate, to the greatest extent possible, the balanced assessment system we have in place for the MSAA where the Smarter Balanced Digital Library and interims are utilized to support educators and students as appropriate. Having a balanced assessment system would also help the OPI comply and provide support to schools with ARM 10.56.101(2) since the "obligation for funding the assessments. . .may not be construed to require a school district to provide these assessments if the state does not have a current contract with test vendors for provision of these assessments to Montana school districts" (ARM 10.56.101(3)(c)).

New with the MSA and AMSA will be emphasis on performance within the OPI's ESSA accountability plan. The OPI's ESSA state plan was approved and can be reviewed on the OPI ESSA Update page. Table F provides details on when the accountability system will use the achievement data from the CRT-Science test and tentatively includes a plan to use the new science achievement data for the OPI's annual meaningful differentiation of schools and every three-year identification of comprehensive and targeted schools as soon as the 2019–2020 school year. In recognition of STEM fields and the value the state places on science, the OPI has included the proficiency on the statewide science test in the accountability system for the elementary level and middle school level.

The AMSA has been included within the accountability system therefore the assessment must be valid and reliable permitting comparability of scores from one teacher or student to next, comparisons across schools, and across years.

A.6 Current Assessment Contracts

The OPI is a governing member of the Smarter Balanced Assessment Consortium (SBAC) (administered from March 21 to May 25, 2018). The current assessment contract for SBAC at Grades 3-8 was awarded to Measured Progress with a contract expiration date on September 30, 2019. SBAC has been delivered using the Test Information Distribution Engine (TIDE) test delivery system (TDS). TIDE provides users with the tools to add and manage users and students participating in the SBAC ELA and Math. OPI would like a single platform to deliver all statewide assessments (see https://mp.tide.airast.org/Common/DashBoard). This SBAC assessment is entirely funded by federal

grants. Under the common elements of this MAAC solicitation, this assessment is within the objective and scope.

OPI administers the MSAA from March 19 to May 25, 2018. The MSAA is the alternate to the Smarter Balanced and ACT tests for students with the most significant cognitive disabilities. The test content is ELA and math. Students in grades 3-8 and 11 participate in this test to meet ESSA and state assessment requirements. The MSAA assessment is aligned to simplified and prioritized college and career ready standards called the Core Content Connectors. OPI recently renewed its terms for MSAA. MSAA is a computer-based test administered through the open-sourced technology platform/delivery system (NCSC-TAO) that was originally developed as part of the National Center and State Collaborative (NCSC). Because all teachers administering science will also be administering MSAA in ELA and math, OPI would like a similar technology platform/delivery system to be used for both the AMSA and the MSAA and accessed through a single sign-on page to reduce test coordinator management burdens. The MSAA subject/grade assessment is not within the objective and scope for this solicitation.

Presently, the OPI assesses students in science with the 2006 Montana Content Standards for Science using its CRT-Science (administered from February 20 to March 27, 2018) and CRT-Science Alternate (administered from March 1 to March 27, 2018). The legacy assessment for science is given at Grades 4, 8, and 10. To support the OPI with its transition period from a standards adoption/implementation event, the OPI secured a two-year noncompetitive sole-source contract awarded to Measured Progress. This contract expires on June 30, 2019. The state science assessments are entirely funded by the federal grants. Under this state-specific general science and science alternate exhibits, the OPI is seeking a Contractor for the MSA and the ASMA thus this subject/grade assessment is within the objective and scope.

The OPI would like to replicate, to the greatest extent possible, the student experience and test administration experience we currently have with our MSAA for the AMSA. The OPI would like consistency across its online interfaces to better support student access and familiarity with the technology. The OPI would like to reduce the testing administrative burden for schools as much as possible through features like a single sign-on. The OPI would also like to parallel the testing window length and time of year administered as closely to MSAA as possible to follow ARM 10.56.101(3)(a)(iii). For greater flexibility the OPI is open to options from late February to early April (or May) as long as schools are afforded the opportunity to have individual student reports (ISRs) and school/district results returned by the end of the school year or no later than June 1st.

A.6.1 Assessment Timeline
OPI's schools and districts are acquainted with the transition plan the OPI used to go from the CRT-Math and Reading assessments to the Smarter Balanced assessment. This old test phase out and new test roll out assessment model was well received and communicated well to our schools.
- In the spring of 2013, the OPI administered its last CRT administration for math and reading.
- Concurrently, the OPI participated in the Large-scale Volunteer Pilot with its schools to pilot the items for the Smarter Balanced assessment.
- In the spring of 2013-2014 school year, the OPI participated in a census field test for the Smarter Balanced assessment to avoid duplicate testing for students.
- In the spring of the 2014-2015 school year, the OPI went operational with its Smarter Balanced assessment.
- The OPI would like to model an abbreviated version of this roll out plan beginning with piloting and field-test ready activities as early as spring 2020.

Following the conclusion of spring 2019 testing, the OPI plans to begin pilot and field-testing with a vendor for its AMSA to try out new item types and give schools and students exposure to online testing

in science at different grades before using the achievement data for state and federal accountability purposes.

The OPI plans to seek a federal waiver for science to have census field testing with its AMSA at three grades (Grades 5, 8 and 11 (high school)) during the spring of 2020. The OPI plans to go operational with its MSA and AMSA at these three grades during the spring of 2021.

A.6.2 Implementation Schedule
- A statewide census Field Test will be administered in spring 2020.
- The first operational administration of AMSA will occur in the 2020-2021 school year.

Contractors are encouraged to propose alternative plans or solutions involving small-scale task tryouts, pilot activities, continued piloting and field-testing efforts to support the assessment although not required.

SECTION B: OBJECTIVE AND SCOPE OF WORK

This section provides a description of the major tasks and activities to be performed by the Contractor for the successful completion of this project and provides information on contract deliverables. The Contractor's response must directly reference and address each of the tasks contained in this section.

The objective and scope of this solicitation is to identify a Contractor for delivering the AMSA to students with significant cognitive disabilities. This is in addition to the focus of the RFP described within the MAAC for the Smarter Balanced assessments for mathematics and ELA and the general Montana Science Assessment (MSA). Montana is soliciting for services related to administration of the AMSA as described below.

Requirements for the AMSA for specific sections of the Technical Proposal, beyond or different from what is required for the Smarter Balanced math and ELA tests, are described below. If a section is not included below, the expectations for the AMSA are the same as the expectations for the Smarter Balanced or MSAA tests.

B.1 Test Development

The Contractor shall provide for the development, of technically-sound science assessment for grades 5, 8, and 11 (high school), and supporting resources for the OPI 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.

The 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 U.S. Department of Education's Peer Review process for state standards and assessments.

Test materials will include a combination of computer-delivered materials (e.g., video, animation, diagrams) and hard copy materials delivered in a digital format through the online system to be printed by teachers for use during the assessment. Test materials may also be shipped to schools or districts and will include task-specific student kits containing required tools, supplies, and other materials not readily

available in the classroom and materials not easily downloaded and printed (e.g., high-resolution color photographs).

Each task will be aligned to the NGSS and incorporate the three dimensions that, when combined appropriately, create meaningful and relevant learning opportunities for students. The use of these performance tasks as the AMSA reflects our belief that all students have access to science experiences that broaden their understanding of the world we live in.

Documentation of the alternate achievement standards development and sample tasks can be used to demonstrate NGSS alignment. Performance expectations must be multidimensional and scaffold across three levels/access points. The MSA will be initially fixed-form thus initial implementation with the AMSA may also be fixed-form. Bidders are encouraged to present alternative proposals or solutions.

B.2 Major Areas of Work
The following sections detail major areas of work desired:
- Test Development
  - Development of alternate achievement standards
  - Development of content specifications
  - Development of item specifications
  - Stimuli, item, task, and test development
- Test Delivery System
- Production of Ancillary Materials
- Test Administration
- Scoring
- Psychometrics
- Security
- Reporting
- Project Management
- Archival and Storage Services
- Support Center

B.2.1 Test Development
To the extent possible, materials developed for AMSA should be consistent in style and design with materials developed for the MSAA being administered in ELA and mathematics. MSAA has developed several supporting documents containing guidelines for item writers as they develop MSAA assessment items. The MSAA Style Guide, attached to this RFP, is for example only and will be altered to suit the intent and goals of this science assessment.

Documentation, designed to fulfill requirements of the U.S. Department of Education's Peer Review process, will be provided by the vendor for all pertinent elements of the science assessment scope of work. The OPI expects full documentation and support from the Contractor to ensure successful planning and completion of the federally mandated peer review under section 1111(e) of the ESEA and 34 C.F.R. §200.2(b)(5) for the AMSA using the current non-regulatory guidance for states. This includes the critical elements that represent the ESEA statutory and regulatory requirements that the OPI science assessment system must meet.

The OPI expects the final product of this work to be a high-quality system of assessments for science that are strongly aligned to the Montana Content Standards for Science (ARM 10.53.8) as described in reference document E. The Contractor will support the OPI with any validation efforts to demonstrate alignment pursuant with expectations outlined by peer review to ensure the AMSA is valid, reliable, and of adequate technical quality for the purposes for which it is used.

The AMSA requires vendors' facilitation and support for all the same tasks as described for the Smarter Balanced or MSAA assessment. Unlike the Smarter Balanced assessment or MSAA, the test design and item development for the AMSA is an expected part of the RFP.

The Contractor will maintain assessment specifications documents as needed or required and deliver updated documents each year. The Contractor will work with the assessment system to create and manage tasks and test forms, ancillary materials, test administration documents.

All services related to test design, task development and review, operational task banking, and test production, including importing existing tasks and exporting newly developed tasks to the AMSA Science assessment system, are the responsibility of the Contractor.

Item Types
The AMSA Science tasks may contain a mix of selected-response items (e.g., multiple-choice) and constructed-response items. Selected-response items are scored dichotomously, right/wrong. Constructed-response items are scored according to item-specific rubrics. Similar to the AMSA items should be centered around common phenomena (e.g., item clusters) and utilize technology enhancements where appropriate. All development, and associated work should follow nationally accepted best practices for large scale summative assessment.

The 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 U.S. Department of Education's Peer Review process for state standards and assessments.

The three-dimensionally aligned science assessments are expected to be delivered primarily in an online format leveraging technologies to engage students in the dimensions and better capture student interactions and understandings. Bidders are encouraged to propose item types utilized in the Smarter Balanced or MSAA assessments in addition to item types not referenced to here to take advantage of industry best practices and emerging research in the field of science assessment. All item types must be delivered in accessible way using the Bidder's TDS. To the extent possible, the AMSA should provide opportunities similar to the experience students currently have with the MSAA assessment to maintain consistency with as how they interact with the existing test interface. OPI is open to innovative approaches to item development and test form development which incorporates the three-dimensional aspects of the NGSS.

Design of the Spring 2020 Field Test
A census field test (or statewide administration) of tasks will occur in the spring of 2020. The primary purpose of the field test will be to produce a set of tasks for the first operational administration of AMSA in 2020-2021 for reporting and accountability needs. Under ideal circumstances, the field test will yield a sufficient number of tasks for the first operational administrations of AMSA.

The design of the Spring 2020 Field Test will differ from the operational test design in several key aspects.
1. Reporting: There will be no formal reporting of results from the field test to LEAs.

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 AMSA. Upon request, the Contractor shall provide the state agency with a copy of any such documentation. Retention requirements for student responses are established by OPI.

Requirements
Contractor will support OPI with the state-specific elements required for peer review as applicable.

B.2.1.2 Description of the Tasks
The performance tasks for the AMSA are designed to serve as both an instructional unit that include formative and summative assessment components for students taking the AMSA. Teachers can repeat sessions within the tasks to ensure that students to learn the essential concepts and standards included in the tasks. Because these tasks will also function as instructional units, they will include instructional materials as well as any materials related to the administration of the summative assessment portions of the tasks.

It is important to keep in mind that the tasks are designed from AA-AS where expectations have been simplified using modified materials and experiments that are amenable to students with various cognitive and physical challenges. While the concepts in the tasks remain true to the NGSS standards, they do not embrace the full depth of complexity or rigor expected in a general education science classroom.

Each science task will be designed to form an instructional/assessment unit that is administered over multiple days. Although the actual pace of instruction and assessment will be determined by individual teachers and their students, the intent is that the AMSA Science tasks are not designed to be administered within a single day nor should they take more than three weeks to complete under anticipated administration conditions; however, the rate of instruction will be variable and be dependent upon the individual strengths and needs of the students. Each performance task will contain sets of summative items that are embedded in the task following relevant instructional sessions.

The OPI expects to have the opportunity to validate the standards prioritization work used to develop the AA-AAS to create the AMSA. The Bidder is expected to coordinate with the OPI and any subcontractor on additional amendment work which could be needed as a result of this validation study. Any future amendment work will be the Bidder's responsible for all expenses associated with educator committee meetings, inclusive of but not limited to, honorarium or stipend, lodging, meals, meeting venue, materials, parking, and mileage for all participants including state staff. Bidder should refer to posted Federal GSA rates.

B.2.1.3 Review Cycle Activities
The OPI will require the Contractor to manage the participation requirements of these various in-person educator committees as required for participation and content/bias/sensitivity reviews. Bidders will collaborate with the OPI on establishing meeting times, frequencies, and committee membership with the OPI having final approval. Bidder's will be responsible for all expenses associated with educator committee meetings, inclusive of but not limited to, honorarium or stipend, lodging, meals, meeting venue, materials, parking, and mileage for all participants including state staff. Bidder should refer to posted Federal GSA rates. Bidder will support the OPI with recruitment and participation needs on a schedule defined by the OPI.

The Contractor will be responsible for the support and logistics of the following meetings:

1. **Validation Study:** Members of the standards validation committee are solicited and selected by the state. Between 12-15 teachers per grade level attend. The Contractor will work with the OPI

to address any standards gaps or shifts from the prioritization of standards studies to ensure comprehensive coverage, if needed.

1.
2. **Task Review Committees**: all tasks developed by the Contractor are subject to review by OPI and educator committees for a series of critical factors to ensure appropriate quality and accessibility:
   - **Content Review** – to ensure that tasks meet the requirements detailed in the Style Guide and they are aligned to the NGSS PEs selected and/or developed for the task.
   - **Bias, Sensitivity, and Accessibility Review**: to ensure that tasks, items, and materials are free from bias, fair, and accessible to students with a variety of cognitive and physical challenges and communication systems such as eye gaze, pointing, AAC, and switches.
   - **Accessible Portable Item Protocol (APIP) Review**: as applicable to ensure that items included in the tasks are compliant with APIP standards.

   - **State review and approval**: to ensure that all tasks and items meet established criteria and best practices for development, OPI must review all tasks prior to educator committee review. Following field testing, a review of all relevant item statistics by OPI must be conducted.

   Achievement Level Setting Revisiting: The Contractor will propose a standard setting process that will result in the identification of achievement level cut scores following the first operational administration of the tests. The proposed process should be consistent with and appropriate for the type of information that will be provided by the AMSA. The proposed process should include a description and timeline for all activities that will take place related to standard setting, including the development of achievement level descriptions and the determination of the number of achievement levels that will be reported. The Contractor will be responsible for all costs associated with standard setting, including, but not limited to, costs related to assembling committees; arranging, facilitating, and conducting meetings; analyzing results; and documenting the standard setting process.

3. The Contractor shall be responsible for supporting the organization of educator committees and convening meetings, as needed, to support the series of reviews described above. The Bidder's responsible for all expenses associated with educator committee meetings, inclusive of but not limited to, honorarium or stipend, lodging, meals, meeting venue, materials, parking, and mileage for all participants including state staff. Bidder should refer to posted Federal GSA rates. Bidder should refer to posted Federal GSA rates found at: http://www.gsa.gov/portal/category/100120.
   - As appropriate, relevant stakeholders and local educators should be included in the review process.
   - The state will identify pools of state-level stakeholders and/or educators who have the appropriate qualifications for each level of the review process.
4. Based on the chronology of task and test development and the expertise required in each review process, multiple meetings with different participants will be needed to complete the review process. OPI, however, is interested in implementing a process that produces quality tasks and assessments in as efficient a manner as possible.
5. The Contractor will propose a plan and schedule for an annual task review process that includes consideration of the following:
   - Grade-level and content area expertise needed by Contractor staff, state, and stakeholders
   - Effective balance of in-person and virtual meetings
   - Training required for effective participation in task review
   - Maintaining task security throughout the review process
   - A process for securing final approval from OPI

6. The Contractor's plan will include a description of the number of meetings and number and type of people involved in each meeting throughout the review process.
7. The Contractor's test development project manager, appropriate grade and subject area developer(s), and support staff as needed, shall participate in all review meetings (listed above) to manage the meetings and to be responsible for the organizing, distributing, secure material tracking, note keeping, data entry functions, and other tasks required for meetings. Arrangements shall be made for the secure distribution and collection of materials, as appropriate.
8. The Contractor will prepare tasks and ancillary materials needed for implementing the tasks, and all other materials required to conduct the item content review meetings. The Contractor shall propose a process for conducting the performance task review meetings that is cost effective and efficient, accounting for the participation of state representatives and educators.

B.2.1.4 Accessibility and Accommodations

The OPI expects the Contractor to take appropriate steps to ensure that its assessments are accessible to all students and fair across student groups by design and within the development and analysis of its assessments. As specified in section 1111 of ESSA, the OPI finds it important to have Universal Design for Learning (UDL) to ensure assessments are responsive to the needs of each learner, including students with disabilities, English learners, economically disadvantaged students, students from major racial and ethnic groups, gifted and talented students, homeless students, migratory students, and students in foster care. For these reasons, the OPI is looking for specific information on existing assessments that incorporate the UDL framework into the design. With our state's unique student characteristics, we would like to gather information on how existing designs may be appropriate for Montana and/or tailored to our needs to promote accessibility and validity for the widest range of examinees. Below are some topics that may be included to describe the present or *in-progress* design to include the UDL principles.

- Inclusive assessment population.
- Precisely defined constructs.
- Accessible, nonbiased items.
- Amenable to accommodations.
- Simple, clear, and intuitive instructions and procedures.
- Maximum readability and comprehensibility.
- Maximum legibility.

Tasks should be designed with the accessibility needs of students already addressed within the design of the task and should not rely on external accommodations or accessibility features to provide access for students. This includes special attention to physical challenges, unique communication systems, and the difficulty with which students who take the alternate assessments have with generalizing information.

The Contractor will ensure that tasks meet requirements for accessibility. The test delivery system used for this assessment should have similar accessibility features and supports used by the MSAA system to include assessment features to support accessibility for all students. These include features that are built into the online test platform as well as those that can be provided by the teacher, if necessary. The table below provides a summary of built-in and teacher-provided test supports embedded in the online test platform and provided by the teacher. The Contractor should refer to the NCSC Assessment System User Guide for Test Administrators, for additional information on MSAA accessibility features.

Table 4. Summary of built-in and teacher-provided accessibility features in the MSAA Online Assessment System

Computer	Teacher-Provided: corresponding alternatives used to support paper-based administration.
Answer Masking	Piece of paper that covers one of more of the answer options; the answers the student has eliminated
Alternate Color Themes	Color overlays
Increase Size of Text and Graphics (magnification)	Adjust size before printing
Increase Volume	Use separate testing space if not using headphones
Line Reader Tool	Two pieces of paper on either side of the line the student focuses on
Text-to-speech (audio player)	Read aloud/re-read

Accommodations include the following:
1. Paper Version of the Test
2. Braille Student Materials:
     • Copies of the regular tasks must accompany the shipment of the Braille materials. Braille notes also accompany the Braille versions.
     • The Braille code must be provided in Unified English Braille (UEB).
     • The Contractor is responsible for having the materials proofed by an independent party that includes a certified Braille reader. OPI may also employ the services of a Braille proofreader. If the Contractor utilizes a subcontractor to publish the Braille and large-print materials then that subcontractor must be approved by OPI.
     • Braille materials used by students during administration of the tasks must be available to ship with regular-format versions of the materials prior to test administration.
3. Large Print Student Materials:
     • Materials used by students during testing must be provided in a large print format and be available for shipment with regular ancillary materials.
     • Quality of graphics, photos, etc. must be identical to regular-sized printed materials.
     • A minimum of 18-point type on 14" x 17" approved paper with options for additional point size.
4. Black and white or Line art of graphics, charts, and tables. All student materials should be available in black and white (grayscale) and line art without shading for students with various visual impairments.
5. American Sign Language:
     • MSAA is currently developing guidelines for providing ASL translation. The draft ASL guidelines are included as an attachment with this RFP.
6. Use of assistive technology:
     • 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.

B.2.2 Test Delivery System and Test Management System
The Contractor will implement a secure online test delivery platform (TDS) that meets industry-standards for security including PEN test results and a plan for addressing potential security breaches.

The OPI would like a single platform to deliver all assessments. Contractor should describe ways the TDS is compatible with the single-sign on (see https://mp.tide.airast.org/Common/DashBoard).

The Contractor will implement an online TDS that contains the following user features:
- State user views of all student and test administrator information (name, district, school, DOB, state ID number for students).
- Ability to search for individual students by district, grade, and school
- Ability to view tests that have been started and completed.
- Ability to delete and transfer students between schools and districts
- Ability to edit student and test administrator information

The TDS should support test management information system that is flexible and modifiable pursuant with needs expressed by the OPI to evolve with any changes in policies or practices to report student information. Additional features of the TDS and/or test management information system should include:
- Ability for administrative users to view and edit student demographic information entered as part of the pre-identification process;
- Ability for administrative users to enter student records prior to or at the time of testing;
- Capability to maintain both student-specific data fields and test-specific data fields;
- Regular, preferably daily, exchanges of data files between the Contractor and OPI providing real-time visibility of current accommodation/support status, student test-taking status (e.g., students pre-identified, tests completed, items to which students have responded, etc.) at the individual level, and test completion and data quality clean-up.

B.2.2.1 Test Management
Consistent with the expectations for Smarter Balanced and MSAA, the Bidder must demonstrate the test management system adheres to these expectations outlined in the RFP below.
- 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 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 tests and accommodations to individual students.
- Ability to assign unique login credentials for each test session.
- Availability and integration of an online test administrator training and certification course.
- Not all members will require this level of administrative user rights. Contractor's system will be configurable to allow different demands for each member.
- Upon state 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.
- The assessment delivery system and all associated systems will require periodic and scheduled maintenance. Downtimes required for this maintenance should be scheduled, to the extent feasible, for EOD Fridays through EOD Sundays, so as to minimize impact on users.

B.2.2.2 Testing Interface
The digital test delivery system employed to deliver test items to learners must have all the required features and functions for those elements identified in this RFP. The test delivery system must be able to

present the specified accessibility features based on the learner's preferences. Specifically, the test delivery system must be able to provide the accessibility features as defined in IMS Accessible Portable Item Protocol . In addition, the test delivery system must allow learners to interact with the system using a standard compliant point device (mouse), keyboard (standard and alternate), touch screen, and/or a tab-enter enabled device. If the delivery system requires additional hardware components or is incompatible with specific devices, the Bidder should specify those requirements in the response. Bidders must identify the supported technology delivery platforms (hardware requirements and software with versions) and any limitations or considerations that must be given for accessibility features.

Contractor will upgrade and enhance the test engine as new technology for assessment delivery becomes available and as assessment needs dictate. OPI 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. Proposals guaranteeing shorter turn-around for system enhancement processes will be viewed positively.

Other planned changes or enhancements can be suggested, but only implemented with state approval prior to the operational assessment or other testing program activity. Contractor will establish monitoring systems with metrics/thresholds approved by OPI to detect system errors ("bugs"). Contractor will grant access to OPI to view error logs.

B.2.2.3 Assessment Portal and Secure File Transfer System
Contractor will host and maintain the OPI assessment portal for access by the state, and LEA teachers, administrators, technology coordinators, as well as students, families, and private citizens. Portals will support the ability to place and access both secure and non-secure assessment-related information and links, even where member-specific.

Consistent with the expectations for Smarter Balanced and MSAA, the Bidder must provide a secure file transfer system to share files with the OPI including state data files described in section B.2.5.3.

B.2.2.4 Availability & Capacity
Consistent with the expectations for Smarter Balanced and MSAA, the 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 OPI.

B.2.2.5 Technology Readiness
Pursuant with peer review, the Contractor will provide support to the OPI to ensure procedures are in place for technology-based assessments including established contingency plans to address possible technology challenges during test administration.

Consistent with the expectations for MSA, the Bidder is expected to supply 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:

By September 15th of each school year, Contractor will provide a complete training program including but not limited to Mp4 with closed captioning, scripts, PPTs, accessible PDFs, syllabus/course outline, annotated references list that includes copyright permissions for use in OPI's Teacher Learning Hub 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.

B.2.2.6 System Security
Consistent with the expectations for Smarter Balanced and MSAA, the 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.

B.2.2.7 Assessment Delivery System & User Interface Interoperability
Consistent with the expectations for Smarter Balanced and MSAA, the Bidder will comply with the Common Education Data Standards. 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 Montana'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 OPI'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. School districts will possess, at a minimum, the following technological capacity. 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:

B.2.3 Production of Ancillary Materials
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 OPI's protocols and practices, and as applicable consistent with the protocols and practices of the MSAA administrations.

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

The content of each MSA 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 OPI 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 OSPI to provide training to public-school educators; this version must be appropriate for posting on the OSPI website or testing portal. OSPI 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 MSA 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;

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- 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 OPI. OPI shall have authority to approve all language, content, and format of the TCM.

Section 508, ADA, and WCAG Compliance
Materials developed for or accessed by the general public must be accessible to people with disabilities, including manuals, training, and other correspondence developed to support the test and test systems. For example, the Test Administration Manual (TAM) is developed for classroom level test administrators and school and district test and technology coordinators, however, the information contained in the TAM must be accessible by parents, students, and the general public.
Per guidance from the Office of Civil Rights, agencies must ensure that all published electronic information is compatible with assistive technology devices commonly used by people with disabilities for information and communication. This applies to persons with disabilities who use assistive technology to read and navigate electronic materials. If an electronic publication cannot be made compliant, then the jurisdiction and Contractor must provide a reasonable alternative to the document.

B.2.4 Test Administration
The Contractor will propose a plan for the development and revision, review, approval, and production of electronic, web-ready versions of all test administration materials (including materials for instruction), sample tasks, and released tasks. Those materials will include, but may not be limited to the following:
1. Test Coordinator Manual
2. Test Administration Manual
3. Practice performance tasks for each tested grade level; including instruction and student materials
4. Scoring materials for hand-scored items
5. Platform User Guide
6. Materials to Support the Interpretation and Use of Test Scores
7. Test Security Materials

The Contractor is responsible for all aspects of test administration for the spring 2020 Field Test and the and subsequent operational test administrations.

B.2.4.1 Practice Tests
Consistent with the expectations for Smarter Balanced and MSAA, the Contractor will provide training solutions and services equivalent for AMSA. Contractors will propose a plan to develop and make available Practice tests for use starting with the 2019-2020 school year. After the introduction of Practice Tests, in succeeding years, Contractor will provide access to the applicable practice tests no later than September 1 of each year – 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.

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.

B.2.4.2 Teacher Training

Consistent with the expectations for Smarter Balanced and MSAA, the Contractor will provide training solutions and services equivalent for AMSA. Contractor will update the existing AMSA Training Tests to make available the same set of accommodations accessible within the AMSA 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.

The Contractor will propose a plan for the development of all training materials for test administration. This includes the development of online self-paced training modules and materials for in-person training. In collaboration with Contractor, OPI 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.

No later than October 1 of each year, Contractor will provide a training test that will allow students to become familiar with the software and interface features. 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.

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 OPI staff.

Contractor will collaborate with OPI 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, AMSA trainings can be combined with trainings supporting ELA and math administration.

A proposal will demonstrate the ability for OPI 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.

Contractor will be available at the Bidder's expense to participate in and delivery training materials to test administrators at the OPI annual assessment conference. Training Materials must be approved byt the state at least 30 days in advance of the conference and provided in accessible formats including but not limited to Mp4 with closed captioning, scripts, PPTs, accessible PDFs, syllabus/course outline, annotated references list that includes copyright permissions. Training materials should be embeddable to support equitable training across the state for teachers unable to participate in the annual conference or regional training offerings. The training materials should be in a format that can be hosted on the state's learning management system (i.e., OPI Teacher Learning Hub).

B.2.4.3 Irregularities

Consistent with the expectations for Smarter Balanced and MSAA, the OPI recognizes three levels of testing incidents: (1) improprieties, (2) irregularities, and (3) breaches. Improprieties, irregularities, and breaches, are behaviors prohibited either because they give a student an unfair advantage or because they compromise the secure administration of the assessments. Whether intentional or by accident, failure to comply with security rules, either by staff or students, constitutes a test security incident.

For the purposes of this solicitation the focus for Contractor support is on irregularities and breaches. For testing irregularities these 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.

B.4.2.3 Improper / Suspect Student Testing Outcomes

For security incidents that result in a need to describe a testing incident, the request must be approved by the state.

In order to report test security incidents to the state, school district staff must utilize the OPI MontCAS test security Application on the OPI website. It can be accessed by navigating to https://apps.opi.mt.gov/MontCAS/frmDefault.aspx.

The Contractor should work with the OPI to verify testing events with the testing incident summaries reported for the testing window. Contractor will identify the situation when discovered to OPI 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, OPI 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.

B.2.4.4 Sensitive Papers

For all summative 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 "sensitive" or "alert" papers according to OPI specifications.

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

Each student response identified as a "sensitive" or "alert" response must be saved to the secure site as a unique file with appropriate identifying information. OPI's current definitions of "alert" responses and review protocol.

B.2.4.5 Breaches

Test security breaches are incidents that compromise the integrity of an assessment, typically by exposing secure test materials. The implications of breaches can affect all students participating in the assessment statewide and nationwide. The Contractor will provide explicit process and communication plans for the OPI to follow and use with schools to report any instance. The Contractor will be responsible for investigative services to monitor potential online breaches including but not limited to web patrolling technologies, data capture techniques, checks for vulnerabilities and potential threats.

B.2.4.6 Shipping and Electronic Dissemination of Materials, Including Student Reports

The Contractor will develop a plan for the secure and efficient distribution and retrieval of all materials related to all administration of the AMSA tests. This includes any materials delivered via the online test delivery platform and any shipped materials; including ancillary test materials kits and/or other printed materials required for instruction and test administration.

No later than September 1, the plan will include a description of how materials will be tracked throughout the test administration process including shipping to and from districts and schools. To assist with this process, OPI shall provide the Contractor a datafile of district and school addresses for each test administration (site/organizational file).

The Contractor will include a process for allowing district and schools within the district to view materials shipment orders by grade level including dates when materials were ordered, how many of each material were ordered, the range of dates that the school/district can expect materials to be delivered, and the person and address to whom the materials will be delivered.

The Contractor will establish and describe an online system for the online dissemination and shipping of state, district, school, and student reports.

The packaging plan for the distribution and shipping of the paper and ancillary test materials, as appropriate, shall use the following guidelines:
- Test materials shipped to districts are boxed separately for each school and delivered to the test coordinator at a single address based on the specific requirements.
- OPI will provide preliminary shipping addresses for all districts and schools in a datafile.
- The Contractor shall establish procedures for confirming and correcting, as necessary, shipping addresses prior to every test administration.
- The on-site window for shipped ancillary test materials and paper-based test materials is 2-3 weeks prior to the test window.
- Provide a detailed confirmation that each district's or school's order was received by the district or school at the correct address during the appropriate in-site window.

The Contractor should have a plan to address materials overage.

The late orders process shall use the following guidelines:
- Procedures shall allow test coordinators to order additional test materials after the receipt of their original order.
- OPI will have approval authority of all late orders prior to material distribution.
- Appropriate timelines for the late test materials ordering window to be developed and approved by OPI.
- All test materials ordered during the late ordering process shall be in-site no later than two schools days after the late order was placed.
- The Contractor will provide detailed confirmation that each late order was packaged accurately and was received by the district or school at the correct address no later than two school days after the order was placed.

B.2.5 Scoring and Analysis

B.2.5.1 Scoring Items
The Contractor is encouraged to use technically sound scoring protocols to include either hand-scoring or artificial scoring (machine scored) options as long as the Contractor can assure the OPI of validity and reliability of the scoring protocol. The Contractor is encouraged to utilize the most cost-efficient means for scoring and adhere to the state reporting turnaround needs.

Contractors are encouraged to propose alternative plans or solutions involving small-scale task tryouts, pilot activities, continued piloting and field-testing efforts to support the assessment although not required.

B.2.5.2 Test
Scores from the summative items on each of the tasks will be aggregated to produce a total composite score for the student. The composite score will be used to classify student performance into one of four achievement levels in accordance with the ARM Content Standards and Performance Descriptors 10.54.2502.
- Level 1 – Novice
- Level 2 – Nearing Proficiency
- Level 3 – Proficient
- Level 4 – Advanced

The Contractor will be responsible for establishing processes and procedures to promote the efficient and accurate scoring of all student responses. For hand-scored items, this includes the development of scoring materials and resources to be used by teachers scoring student responses. For machine-scored items, this includes processes that ensure and verify that all student responses are captured and scored correctly. Possible scoring protocol options the Bidder may cite include:
1. Machine-scored items: The Contractor will describe the process for capturing and scoring student responses to machine-scored items.
2. Hand-scored items: The Contractor will describe the process for developing scoring rubrics and related scoring materials that will be used by teachers to score all hand-scored items included in the tasks to ensure that teachers score items accurately. The Contractor will identify any item types that pose a particular challenge for scoring by teachers.

The Contractor will propose the scoring protocols to be used with the AMSA and the validity evidence to support this. If hand-scoring is utilized the Contractor must describe a system for auditing of hand-scoring by teachers for the primary purpose of improving the accuracy of scoring on future test administrations.

B.2.5.3 Data Management

For all operational AMSA assessments, Contractor will replicate pre-identification business rules consistent with the rules used for Smarter Balanced and MSAA . Contractor's pre-identification system must be compatible with the corresponding OPI Student Information System (SIS) plus accommodate data as defined by OPI's data specifications document. OPI will have final approval of the business rules established for each administration year.

- Record Reconciliation (Data Quality Check) — Contractor will establish procedures, in concert with OPI, 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 OPI on final review and approval of the score file prior to acceptance by the state. Upon OPI approval of the final score file, Contractor will used said file for the production of score reports.

- Secure File Transfer System — The Contractor will supply a secure file transfer system to share files directly with the OPI. Upon OPI approval of the score files and formats, Contractor will use the secure file transfer system to share files with the OPI for state-specific longitudinal and state report card needs.

B.2.6 Psychometrics

The Contractor is responsible for conducting all analyses necessary to ensure that all student, school, system, and state results reported from AMSA are accurate. The Contractor is responsible for conducting all analyses necessary to document the technical quality and characteristics of the tests and test results for OPI. Included in this category are analyses necessary to demonstrate the appropriateness of the tests for all Montana students, and to document accessibility of the test and inclusiveness of administration policies.

The Contractor is also responsible for conducting all analyses necessary to provide documentation and evidence of the proper administration of the AMSA. In particular, the Contractor is responsible for conducting all technical and psychometric analyses necessary to verify and document the proper implementation of AMSA test delivery specifications. Contractor will provide pertinent, technical documentation of the Contractor-provided services to ensure validity and reliability of test scores, and fairness to test to support the use of test results for accountability and to support subsequent OPI peer review.

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.

Contractor will conduct all internal analyses necessary to support test construction, scoring, and reporting, as needed. The Contractor's response must address their capacity to conduct the necessary analyses, and technical or psychometric issues that might arise and analyses that might be needed due to administering the AMSA.

Additionally, Contractor will deliver an annual technical report that includes, but is not necessarily limited to details addressing, as applicable:
- 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

The Contractor will provide a description of all psychometric activities and services that will be provided for this project. That description should include, but not be limited to, psychometric activities and services related to:
1. Performance task and test development;
2. Field testing Field testing procedures, sampling methodologies, and resulting data;
3. Scaling and equating methodologies;
4. Information pertaining to content and bias reviews;
5. Item statistics;
6. Reliability and validity measures;
7. Quantitative and qualitative readability indices;
8. Task and item scoring;
9. Producing composite student scores;
10. Assigning achievement levels;
11. Ensuring the comparability of results across years;
12. Evaluating the technical quality of the assessment;
13. The Contractor will produce an annual Technical Report following the Spring 2020 Field Test and each operational administration. The purpose of the Technical Report is to document relevant information to provide evidence of the validity and reliability of the alternate assessment science tests for their intended uses. The Contractor will propose a design for the format and content of the Technical Report that will be approved by OPI. The Technical Report will be delivered in electronic format to be posted on OPI's website. By December 1, Contractor will provide OPI with an electronic copy of the technical report for the previous year's test administrations, with standard rollover revisions, for review and updating. No later than February 1, a final copy of the report will be submitted. Contractor will collaborate with third-party psychometric consultant, if specified by the state, to review and validate all assessment results prior to release for public review.
14. In addition to the Technical Report, the Contractor will support OPI, as needed, in identifying, documenting, and compiling other information needed for Technical Advisory Committee (TAC) meetings and Peer Review.

B.2.7 Test Security
Due to the administration options and instructional necessity of the AMSA, the Contractor is still expected to provide training materials and support for standardized procedures and protocols to ensure information about student academic performance is accurate, valid, reliable, and timely.

Contractor is encouraged to provide training and security certification measures to support the OPI with ensuring all persons assigned responsibilities of handling materials and administering assessments are trained and will comply with test security protocols. The Contractor will propose a plan that describes the steps that will be taken to ensure the following:

1. The transfer of confidential student information, including, but not limited to, student identifying information, student responses, and student results.
2. The identification of breaches in test administration procedures or ethical testing practices.
3. The secure storage and/or destruction of secure and confidential information.

The Contractor should establish processes and procedures to establish appropriate test administration practices, to monitor test administration, monitor signed test security agreements, and to identify likely breaches in ethical test administration practices.

The Contractor is also responsible for ensuring the secure collection, transfer, and storage of all confidential student information. Contractor must follow and state and federal data privacy laws and regulations.

B.2.7.1 Data Analytics/Forensics
Given the varying administration possibilities with the AMSA to include one-to-one administrations (teacher and student) over multiple days, the Contractor should provide appropriate options following each administration to conduct post-testing forensics and provide the OPI with analysis irregular response patterns at the student, classroom, school, and school district levels for purposes of identifying possible testing irregularities.

B.2.7.2 Parent request to view
Contractor will support OPI in providing parents/guardians access to view applicable student records consistent with the Family Educational Rights and Privacy Act (FERPA). Contractor will devise secure electronic processes to present, upon request, student responses to administered tests for parent review. The OPI will approve all proposed processes and will work with Contractor to construct an accompanying timeline to fulfill viewing requests. The established timeline must include the FERPA requirement for responses to parents within 45 days of receipt of the request (by the parent or family).

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).

B.2.8 Reporting
As defined in the Montana ToA (Reference Document E), the OPI has a commitment to ensure assessments yield meaningful reports on student academic achievement standards in science (see ToA and ESSA Sections 1111(b)(1)(A) and (C) and 1111(b)(2)(B)(ii) and (v)(II)). The OPI has had considerable comment from the field on this topic and has used this feedback to inform the vision of its assessment system for science as laid out in the ToA. Consequently, the OPI is seeking information on state and local educational agency's reports in place at other SEAs or as proof-of-concepts to share with the OPI Science Partner Task Force to determine if these products/services provide individual student reports to parents, teachers, and principals and include the results of science assessments that meet the state and local report cards requirements but that are also informative to local data-decision making (see ESSA Sections 1111(b)(2)(B)(x) and (xii) and 1111(h)(1)(C)(ii) and (2)(C)).

Contractor should provide evidence of administration procedures and data-capture methods which are standardized in ways that support comparability across students, schools, and time. The Contractor will be responsible for the design, production, and secure distribution of all reports of student, school, district, and state results required for this project. OPI will approve all wording, the final design, and layout of all reports and reporting documents.

The primary score reported from the AMSA Science will be the achievement level for individual students. In addition to the achievement level, individual students will also receive feedback that will include a raw score on the domain tested on each task and feedback on the student performance on the Practices across the tasks.

Contractor should include a plan to make the student, school, and district data available electronically in an online reporting tool or in coordination with a third-party subcontractor separate from the data file submissions to the OPI. The OPI uses online reporting to provide schools with timely access to unverified student, school, and district data before the end of the school year but no later than June 1. The OPI verifies and conducts quality assurance checks on the state data files for incorporation into the state longitudinal database GEMS. The GEMS repository is viewed as the "authority" of results for the purpose of accountability and public reporting. Bidders are encouraged to submit alternative solutions or options to the state in order to make the student, school, and district available more quickly for the narrow reporting turnaround. All verified state data must be ready for state-level reporting no later than September 1st of each year.

Contractor will produce the following reports:

- **Individual Student Report**: The individual student report (ISR) will be a hard copy report that contains the student scores described above as well as additional information to support the interpretation and use of the reports by parents and guardians. The Contractor will be responsible for shipping the color reports to schools along with the score interpretive guide. ISRs must also be available in electronic format for download in both color and grayscale formats.
- **Aggregate Reports**: In addition to individual student reports, there will be aggregate reports summarizing results at the school, district, and state levels. The aggregate reports will be produced electronically and delivered online.
- **School Roster**: A school roster will be produced to provide achievement level and summary performance task results for each student participating in the assessment. School Rosters will be produced in pdf format to be delivered online and printed locally.
- **Task Reports**: In addition to the overall AMSA reports, the online system should provide basic summary reports when responses and scores for each item within a task are submitted by the teachers. At a minimum, these reports would provide item level scores and a total score for the completed task for the individual student.

By no later than October 1 of each school year, the Contractor must provide mock-ups of the individual student reports, scheduled for the coming spring, to the state for review. The Contractor shall modify the mock-ups as deemed necessary. OPI 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.

All reports, with the exception of Task Reports, will be delivered within twenty-one (21) days of the end of the testing window beginning with the first operational administration. All reports, with the exception of task reports, will be delivered within twenty-one (21) days of the end of standard-setting following the first operational administration.

All reports, with the exception of individual student reports, will be provided in electronic format only. Individual student reports will be provided as hard copies, with two copies of each individual student report delivered to the school.

All data files will be prepared in a format agreed upon by OPI and delivered to the state, districts, and schools in a secure manner agreed upon by OPI.

1. The Contractor will propose a design for each required report and work with OPI to determine the final format of the reports beginning with the first operational administration.
2. The Contractor will propose a design for a parent/guardian letter and parent-friendly interpretive document.
3. The Contractor will be responsible for developing report interpretation documents for educators and parents.
4. The Contractor will describe the processes and procedures or systems that will be used to ensure the accuracy of all information included on reports, including, but not limited to, student/school/district identifying information, demographic and program information, test/task identifying information, and state/district/school/student results. The proposal should include a description of any review procedures that will be available to the state and/or schools prior to the release of results.
5. The Contractor will propose a system for the secure and efficient delivery of electronic reports and data files to schools, districts, the state, and any other appropriate parties. The system must include the capability to ensure the security of confidential data and limit access to reports and data files to authorized individuals. The Contractor's proposal should include a description of the proposed reporting system as well as the system for ensuring security.
6. The Contractor will be responsible for correcting, at the Contractor's expense, any errors in reporting arising from activities that are the responsibility of the Contractor. This may involve, but is not limited to, activities such as scoring errors, conducting analyses, and supporting analyses conducted by or commissioned by OPI. The Contractor will identify the cause and extent of errors; and reprogram and/or reproduce reports, replace data files, and redistribute electronic or hard copy reports.
7. The Contractor will propose a system for correcting errors in reports arising from activities or actions by the state, district, or schools.

B.2.9 Support Center (Help Desk)
The Contractor's Support (or Help Desk) will be available via a toll-free telephone number, email, and instant messaging.

Contractor will provide Tier 1 help desk support to OPI. Contractor will collaborate with OPI to determine the degree of direct contact with districts and schools, and which inquiries will be directed to OSPI 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 Montana plus two hours before and after the school day (nominally 6:00 a.m. to 5:00 p.m. local time).

The OPI has an Assessment Division that is staffed with five FTEs and provides technical support, training on test security, and assessment literacy professional development for over 400 districts and 830 schools. The statewide assessments annually test over 80,000 students in Grades 3-8 and 11. With the state's limited resources, the OPI requires a Contractor to provide a variety of products/services to support Montana's geographically large and ruralness including diverse help desk assistance.

Contractor will provide OPI 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).

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 parallel the Tier 1 help desk are required for the Tech Support services.

Call Center Metrics: Contractor's Customer Call Center will provide administrative monitoring and tracking and daily reporting to OPI of the following metrics for every hour and day that the call center is in operation.

- Average time to answer
- Maximum time to answer
- Average length of call
- Maximum length of call
- Call hold time
- Call abandonment rate
- Classification of calls in a mutually agreed form
- Percent achieving satisfactory resolution on initial call at Level 1 and at Level 2
- Percent of calls achieving satisfactory resolution within 1, 4, 8 and 24 hours
- Percent not achieving satisfactory resolution within 24 hours

The Contractor must include a plan for timely electronic notification to district and school administrators and test administrators through email, posting a notice on the online system, and/or direct calling, of any issues affecting test administration.

B.2.10 Disposal, Archival and Storage Services

The plan for secure storage and secure destruction of materials, including electronic data files containing student information or secure test information, shall use the following guidelines:

- **Unused Task Materials**: After testing, the Contractor shall inventory and store any paper-based unused task materials for use in future test administration cycles. During this time, the Contractor shall be required to ship quantities of these materials, as necessary, to the state.

- Documents and electronic files containing student information and responses:
  - The plan for the secure, collection, storage, and use of all student data must be approved by OPI. The Contractor shall not use student information for any purpose other than those related to the implementation of the assessment program and approved by OPI.
  - The Contractor shall store paper-based documents containing student responses and all electronic student CBT response files, at Contractor expense, for at least one year.
  - At the end of a specified the period, the Contractor shall ship or destroy the materials according to instructions from OPI.
  - Destruction of secure documents and CBT student response files shall be requested in writing and authorized by the OPI.
  - The Contractor shall submit a letter to OPI requesting permission to destroy specific materials.
  - Test security requirements shall be maintained throughout the destruction process.
  - It may be necessary to retain a small number of used documents for a longer time period due to a State's security investigations.
  - At the end of the contract, the Contractor shall be expected to ship these materials to the new Contractor at the direction OPI.

- **Excess Test Materials**: The plan for excess test materials shall require OPI approval.
  - The Contractor shall store some digital record of the CBT assessments as they appeared to the students for that administration.
  - Any materials that may be used in subsequent administrations shall be stored by the Contractor throughout the life of the contract.
  - Six (6) months after the contract ends, the subcontractors and print contractors shall be required to destroy all electronic files and print copies according to the test security requirements approved by OPI.
  - The Contractor and all subcontractors shall submit certificates of destruction that describe in writing the specific materials and files destroyed.

B.2.11 Project Management

Contractor will designate a Program Manager (PM) to oversee work pertaining to the applicable state's assessment needs. The PM shall serve as the primary liaison between Contractor and the state. The PM will also serve as Contractor's primary customer service representative to the state, ensuring that school districts receive quick and accurate responses to questions, requests, or concerns.

The proposed PM must have the authority necessary to coordinate and establish work priorities, on behalf of the Contractor, for all assigned personnel, including those of any sub-contractors, associated with deliverables and service fulfillment of an awarded contract.

The Contractor will provide a description of the approach they propose to use to manage the development, implementation, and ongoing maintenance of the AMSA as described in this RFP. The Contractor will describe how the proposed approach is adequate to fulfill the work described in this RFP.

The Contractor will propose a management plan that includes a description of the proposed processes and methodologies that will be implemented for staff management, communication management, scope/change management, cost management, quality management, risk management, and schedule management.

B.2.11.1 Meetings

The Contractor will be responsible for the support and logistics of the subsequent meetings. Bidder will be responsible for all expenses associated, inclusive of but not limited to, lodging, meals, meeting venue, materials, parking, and mileage for all participants including state staff. Bidder should refer to posted Federal GSA rates found at: http://www.gsa.gov/portal/category/100120.

Planning/Kick-Off—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 OPI. The meeting will include agency personnel and other designees, as determined by OPI, 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.

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

Debrief Meeting—no later than seven (7) calendar days after the test window, the Contractor shall schedule and attend a meeting either in-person or virtually in a format approved by the OPI based on the current need. The meeting will include agency personnel and other designees, as determined by OPI, to discuss the required services, discuss strengths and areas for improvement of future administration of the AMSA.

All meetings, inclusive of the kick-off and annual planning meetings, the 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.

The Contractor will reimburse participants according to either state or GSA 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.

B.2.11.2 Project Staff

The Contractor will identify by name all persons proposed to fill key project management positions within this project. The Contractor will also provide the full-time equivalent (FTE) that each of the key project management staff will devote to work on this project.

The Contractor will provide staffing charts that show the proposed organization of program staff for this project, including the FTE devoted to work under this contract. The staffing charts should identify individuals fulfilling key project functions by name along with the hours that each will devote to this project. In addition to a program manager, Contractor will designate staff for the Contractor to include but not limited to these roles:

- Test Development Specialist
- CBT system and content support
- Teacher training materials for task and test administration and use of the online system
- Task and item development
- Ancillary materials development
- Delivery of materials to districts and/or schools
- Data processing, including scanning and imaging, if applicable
- Scoring, including the development of scoring materials
- Psychometric activities and technical analyses
- Reporting
- Information Technology Specialist
- Service Center
- Content Development/Specialists

The Contractor will provide a 1-2 page vitae for each person proposed to fill a key management or operational role within this project. The vitae must include relevant educational background, professional experience, and experience with the NGSS.

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.

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 in the previous roles, details of the responsibilities of the person in stated roles, results of the services performed, and whether the person is proposed for the same services for this project.

If the Contractor proposes the use of any subcontractors to assist in or to complete any portion of this work, the Contractor assumes full responsibility for the management of those parties with regard to this project. The management plan must demonstrate that the Contractor has the capacity to coordinate project activities among any proposed subcontractors.

The Contactor 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.

The Contractor will agree and understand that the Contractor's personnel are subject to the ongoing approval of the state. If requested by the state, the Contractor will replace any individual who is deemed unacceptable to the state for continuance of serving the contract.

By June 1 of each year, the 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. The Contractor will update the calendar upon state request and as needed to accommodate schedule revisions.

The Contractor will designate appropriate personnel to participate in weekly conference calls with state personnel. The Contractor's PM 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 if needed, realized by those attending or participating in such meetings or conference calls.

B.2.11.4 Experience of the Vendor

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 related performances, especially in the development, administration, and scoring of statewide online-formatted assessments. If a Bidder is proposing an entity other than the Bidder's to perform the required services, a Bidder should also submit the information requested for such proposed subcontractor.

    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 provided in the proposal should provide at a minimum the names, addresses, telephone numbers, and fax numbers/email addresses of three (3) organizations for whom work of a similar nature 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 regarding qualifications of the submitting Bidder.

As part of the evaluation process, the state agency may contact a Bidder's, and any proposed subcontractors', references. This would include explicitly listed references as well as possible references not listed or identified within a Bidder's proposal. The non-listed references are seen as potential sources of pertinent information based on current or previous experiences with the Bidder or with the proposed subcontractor.

A Bidder accepts and understands that the solicitation process in no way obligates the OPI to contact proposed references of the Bidder or the Bidder's proposed subcontractors' prior to rendering decisions on responsiveness or an eventual award decision.

B.2.11.5 Project Communication

The Contractor shall propose a plan for efficient and regular communication between the Contractor and OPI. The Contractor should propose mechanisms to ensure effective, efficient, and secure communication among all parties, including conveying relevant up-to-date information to and among project management, operational staff, OPI staff, and any committees identified in this scope of work.

1. The Contractor will propose a schedule of regular conference calls to ensure all requirements and timelines are maintained and to address needs for problem solving and time-sensitive adjustments.
2. The Contractor shall provide a toll-free conference line and secure online meeting software for project meeting calls.
3. The Contractor will propose a schedule of regular management and operational meetings necessary to ensure that all requirements and timelines are met. The meetings will take place at the Contractor's headquarters, OPI, or at an appropriate site within Montana dependent upon the nature of the meeting and proposed participants. OPI anticipates that at least one in-person meeting per test cycle will be necessary for the following activities.
   - General Project Management
     - The Contractor should anticipate that the first in-person project management meeting will take place at OPI within thirty days of contract execution.

- The Contractor will be responsible for the logistics, facilities, and travel costs of their staff and required subcontractor's staff for all management meetings. The Contractor will be responsible for travel costs and expenses for relevant OPI staff for all management meetings and oversight activities. The Contractor will make provisions for remote participation of any necessary Contractor or OPI staff unable to travel to the meeting.
    - Development of a Scope of Work document that includes timelines and other relevant details
    - Task and item development
    - Task and item review
    - Task and test administration; including three (3) days of on-site teacher training and development of all training materials
    - Scoring and Reporting
    - Psychometric analyses
4. The Contractor will be responsible for the development, production, and dissemination of all information and materials necessary for all project calls and meetings, including, but not limited to, meeting invitations, agenda, materials, and minutes/action items.
5. The Contractor will propose a set of project management reports that will be provided to OPI to document ongoing and completed project activities. At a minimum the reports will include an annual project schedule and scope of work to be reviewed and agreed upon at the beginning of each testing cycle.

Terminology

Throughout this document, the term 'assessment' is used to refer to the full suite of statewide summative science assessments being developed or selected by a state for a given grade level (inclusive of multiple forms, years of administration, etc.). Some of the evidence descriptors are specific to what an evaluator might examine on an operational test form (the tests that students might see, plus answer keys and associated alignment claims)—these are labeled as 'test forms' and are distinguished from 'documentation', which include supporting information that relates to the development and interpretation of the entire assessment suite.

The term 'tasks' is used instead of the more traditional 'items' to better reflect the nature of questions on assessments designed for Framework-based standards. A task includes all scenario/stimuli and prompts associated with a common activity; it can utilize multiple item formats, can have multiple parts, and can require students to respond to open-ended questions.

The term 'prompt' is used to identify the specific questions associated with a task. Generally, one or more prompts combine to form a task.

A 'scenario' is the phenomenon- or problem-based context used to engage students in the scientific thinking required by the task. A scenario is coherent, engaging, relevant, and provides students with the scientific information (descriptions, data, models, arguments, etc.) they need to successfully respond to the task using the SEPs, CCCs, and DCIs targeted by the task.

SECTION C: COST PROPOSAL

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 Montana State sales tax, if applicable.

Use the format established in Exhibit K 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. 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 E: EVALUATION AND CONTRACT AWARD

OPI 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.

E.1 EVALUATION PROCEDURE

Responsive proposals will be evaluated strictly in accordance with the requirements stated in this RFP and any addenda issued.

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 RFP 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 180~~150~~.

2.   EVALUATION WEIGHTING AND SCORING

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

Technical Proposal – 50%~~60%~~		**90 points**
Project Approach/Methodology	20 points (maximum)	
Quality of Work Plan	35 points (maximum)	
Project Schedule	15 points (maximum)	
Project Deliverables	20 points (maximum)	

Management Proposal – 25%~~20%~~		**45~~30~~ points**
Project Team Structure/Internal Controls	25~~15~~ points (maximum)	
Staff Qualifications/Experience	15~~10~~ points (maximum)	
Reference Checks	5 points (maximum)	

Cost Proposal – 25%~~20%~~		**45~~30~~ points**
Cost Rating	30~~15~~ points (maximum)	
Overall Cost Evaluation	15~~10~~ points (maximum)	

GRAND TOTAL FOR PROPOSAL	**180~~150~~ points**

NOTE 1: Soliciting agency will determine, through negotiations, whether to accept the products/services and costs of the products/services as stated in the Cost Options proposed by the winning bidder.

E.3 NOTIFICATION TO BIDDERS

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

E.4 SELECTION OF APPARENT SUCCESSFUL CONTRACTOR

Award, if one is made, will be made to the highest ranked Bidder, or, if OPI 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 Contractor, 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.

OPI 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.

OPI 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, OPI 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 OPI 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 OPI. This protocol will be followed until a contract has been signed. If all Proposals are rejected, Bidders will be promptly notified.

OPI 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.

E.5 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.

E.6 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.

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:
    o Correct the errors and re-evaluate all proposals, and/or
    o Reissue the RFP document and begin a new process, or
    o 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 1 **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)

Criteria	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 45~~30~~ points)

Criteria	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.	25 ~~15~~	15 ~~12~~	12 ~~9~~	6 ~~5~~	0	
BIDDER's capacity and staffing experience speak to the capacity and ability to deliver on the project objectives.	15 ~~10~~	12 ~~8~~	8 ~~6~~	4 ~~3~~	0	
BIDDER's references provide appropriate level of insight to the Bidder's capacity and ability.		5			0	

Cost Proposal (maximum 45~~30~~ points)

Criteria	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.	15 ~~30~~	12 ~~25~~	8 ~~15~~	4 ~~10~~	0	

Evaluation of the Cost Proposal

A total of ~~25~~ 30 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~~ 30 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~~ 30 points. The next lowest acceptable cost proposal was $75,000 and would receive ~~16.7~~ 20 points {(Low Bid ÷ High Bid) x ~~25~~ 30}.