

STATE OF WASHINGTON
OFFICE OF SUPERINTENDENT OF PUBLIC INSTRUCTION

Smarter Balanced Assessment Consortium Request For Proposals (RFP):

SBAC RFP-04 (Repost)

All new information is indicated in red.

Note to potential respondents:

- This Addendum is intended to revise, clarify and become part of the *SMARTER Balanced Assessment Consortium Request for Proposals to Develop Item and Task Specifications, Style Guide, Bias and Sensitivity Guidelines, and Accessibility and Accommodations Guidelines*, RFP (SBAC RFP-04), issued July 26, 2011.
- All amendments, addendums, and notifications will be posted on the OSPI Web site and released via the Washington Electronic Business Solution (WEBS) Web site.
- SBAC has determined the need for a reissue of SBAC RFP-04. The reissue is for the following reasons:

Since original release of the corresponding RFP, SBAC has identified several instances where the information intended to provide vendors guidance in submitting bids was either confusing or short of the needed details, or was non-existent. To that end SBAC will reissue RFP SBAC-04 to clarify the expected scope of work for this contract.

This reissuance will provide Vendors the opportunity to:

1. Re-submit their proposals to align with new requirements.
2. Modify the earlier proposal to comply with new requirements identified in the reissuance.
3. Submit new proposals (in the case of new vendor entries to the solicitation).
4. Hold to the original submitted proposal.

Vendors taking either options 2. or 4. are to submit a letter stipulating the option chosen, what information will be held consistent from the original submission and what new information, if any, needs to be considered in the added evaluation period.

**STATE OF WASHINGTON
OFFICE OF SUPERINTENDENT OF PUBLIC INSTRUCTION
OLYMPIA, WASHINGTON**

REQUEST FOR PROPOSALS (RFP)

RFP NO. 04 Repost

This RFP is available at the Office of Superintendent of Public Instruction website located at <http://www.k12.wa.us/RFP/> and at the Office of General Administration, Washington Electronic Business Solution (WEBS) Procurement Website at <http://www.ga.wa.gov/webs/>. All RFP amendments or Vendor questions and OSPI answers will be posted to these sites. All interested Vendors must be registered with WEBS under the following commodity codes in order to receive notifications: 924-05 Advisory Services-Educational; 924-16 Course Development Services – Instructional/Training ; 918-38 Education and Training Consulting; 924-19 Educational Research Services; 924-18 Educational Services-Alternative; 924-20 Examination & Testing; 924-78 Teaching & Instruction Services

PROJECT TITLE: SMARTER Balanced Assessment Consortium Request for Proposals to Develop Item and Task Specifications, Style Guide, Bias and Sensitivity Guidelines, and Accessibility and Accommodations Guidelines.

PROPOSAL DUE DATE: 4:30 PM, Pacific Daylight Time (PDT) **October 14, 2011**

ESTIMATED CONTRACT PERIOD: **November 22, 2011 to January 27, 2012.** Amendments extending the period of performance, if any, shall be at the sole discretion of OSPI.

VENDOR ELIGIBILITY: This procurement is open to those Vendors that satisfy the minimum qualifications stated herein and that are available for work in Washington State.

SUBMIT PROPOSAL TO:

Michael Middleton,
Director, Business & Special Populations
Assessment and Student Information
Proposal Delivered by Mail:
P.O. Box 47200, Olympia, WA 98504-720

Proposal Delivered by Express/Hand Delivery, Or Courier:
600 Washington Street South, Olympia, WA 98504

FAXED BIDS WILL NOT BE ACCEPTED.

The SMARTER Balanced Assessment Consortium brings together multiple states to create a common, innovative assessment system aligned to the Common Core State Standards in mathematics and English language arts for the purpose of furthering member states' goal of ensuring all students leave high school prepared for postsecondary success in college or a career. To better attain this goal, the Consortium works in close collaboration with representatives from institutions of higher education from its member states. The Consortium is led by its member states with management support from WestEd, a not-for-profit organization whose 45-year charge has been focused on bridging the gap between research and practice. The Consortium's projects are funded through a four-year, \$175 million grant from the U.S. Department of Education, comprising 99% of activity resources, with the remaining support provided through generous contributions of charitable foundations.

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Section A. INTRODUCTION

1. DEFINITIONS

Definitions for the purposes of this RFP include:

Addendum – An addendum is issued when supplemental information has been added to the RFP since its original posting.

Amendment – An amendment is issued when information in the RFP has been changed (to an RFP) since its original posting.

Bid – A formal offer submitted in response to this solicitation.

Contractor – Individual or company whose proposal has been accepted by OSPI and is awarded a fully executed, written contract.

Letter of Intent – A letter submitted by a potential consultant/vendor notifying OSPI that they intend to apply for the RFP when it is issued.

OSPI – Office of Superintendent of Public Instruction is the agency of the State of Washington that is issuing this RFP.

Proposal – A formal offer submitted in response to this solicitation.

Request for Proposals (RFP) – Formal procurement document in which a service or need is identified but no specific method to achieve it has been chosen. The purpose of an RFP is to permit the Vendor community to suggest various approaches to meet the need at a given price.

SBAC – SMARTER Balanced Assessment Consortium

Vendor – Individual or company (firm, state agency, etc.) submitting a proposal in order to attain a contract with OSPI.

2. PURPOSE OF REQUEST FOR PROPOSALS

The Office of Superintendent of Public Instruction, hereafter called "OSPI," is initiating this Request for Proposals (RFP) to solicit bids from Vendors interested in participating on a project to develop item and task specifications for the summative and interim assessment components of the SMARTER Balanced Assessment Consortium. The RFP solicits bids for specifications for the four major item/task types for the SBAC summative and interim assessments (selected response items, constructed response items, technology-enhanced items, and performance tasks), a Style Guide, Bias and Sensitivity Guidelines, and Accessibility and Accommodations Guidelines .

3. BACKGROUND

Authorized under the American Recovery and Reinvestment Act of 2009 (ARRA), the Race to the Top Assessment Program provides funding to consortia of states to support the development and implementation of new common high-quality assessments that: 1) are aligned with the SBAC's common set of college- and career-ready, K–12 standards (the basis of which will be the Common Core State Standards released by the Council of Chief State School Officers and the National Governors Association; refer to Exhibit B [of the RTTT Application), 2) are valid and instructionally useful, 3) provide accurate information about what students know and can do, and 4) measure student achievement against standards or expectations designed to ensure that all students gain the knowledge and skills needed to succeed in college and the workplace. Over the past decade, state assessment results have brought much-needed visibility to disparities in achievement among groups of students and helped meet increasing demand for data that can be used to improve teaching and learning. These new assessments are intended to play a critical role in educational systems, providing administrators, educators, parents, and students the data and information needed to continuously improve teaching and learning.

To fully meet the twin needs of accountability and instructional improvement, however, states need assessment systems that are based on standards designed to prepare students for college and the workplace, and that more validly measure what students know and can do. Further, states need assessment systems that better reflect good instructional practice and support a culture of continuous improvement in education by providing information that can be used meaningfully and in a timely way to determine school and educator effectiveness, identify professional development and support needs, improve programs, and guide instruction.

As delineated in the U.S. Department of Education's release of notice inviting applications (NIA) for the fiscal year 2010 Race to the Top Assessment Program competition in the *Federal Register* on April 9, 2010, the Comprehensive Assessment Systems grant category accomplishes this aim through the Department's plan of awarding two categories of grants:

- Comprehensive Assessment Systems grants, which provide funding for the development of new assessment systems that measure student knowledge and skills against a common set of college- and career-ready standards in mathematics and English language arts.
- High School Course Assessment Program grants, which provide funding for the development of new assessment programs that, for each course, measure student knowledge and skills against a common set of expectations that are rigorous and designed to ensure that students who pass the course assessment are on track to being college- and career-ready.

NOTE: The focus of the SBAC is specific to the Comprehensive Assessment Systems Grants

Overview of Comprehensive Assessment Systems Grants

This grant category supports the development of assessment systems by consortia of states that provide reliable, valid, and fair performance results for individuals and groups of students that can be used for accountability purposes and to guide best instructional practice. Comprehensive Assessment Systems grants provide funding for the development of new assessment systems that measure student knowledge and skills against a common set of college- and career-ready standards (as defined in the NIA) in mathematics and English language arts in a way that covers the full range of those standards, elicits complex student demonstrations or applications of knowledge and skills where appropriate, and provides an accurate measure of student achievement across the full performance continuum. Assessment systems developed with Comprehensive Assessment Systems grants must include one or more summative assessment components in mathematics and in English language arts that are administered at least once during the academic year in grades 3 through 8 and at least once in high school; and that produce student achievement data and student growth data (both as defined in the NIA) that can be used to determine whether individual students are college- and career-ready (as defined in the NIA) or on track to being college- and career-ready (as defined in the NIA). In addition, assessment systems developed with Comprehensive Assessment Systems grants must assess all students, including English learners (as defined in the NIA) and students with disabilities (as defined in the NIA). Finally, assessment systems developed with Comprehensive Assessment Systems grants must produce data (including student achievement data and student growth data) that can be used to inform (a) determinations of school effectiveness; (b) determinations of individual principal and teacher effectiveness for purposes of evaluation; (c) determinations of principal and teacher professional development and support needs; and (d) teaching, learning, and program improvement.

To be eligible for a Comprehensive Assessment Systems grant, an eligible applicant must include at least 15 states, of which at least 5 states must be governing States (as defined in the NIA). An eligible applicant receiving a Comprehensive Assessment Systems grant must ensure that the summative assessment components of the assessment system (in both mathematics and English language arts) will be fully implemented statewide in each state in the consortium no later than the 2014–2015 school year. It is the expectation of the Department of Education that states that adopt assessment systems developed with Comprehensive Assessment Systems grants will use assessments in these systems to meet the assessment requirements in Title I of the ESEA.

In addition to meeting the need for assessment systems that can be used to determine whether students are college- and career-ready, this grant category seeks to ensure that the results from those systems will, in turn, be used meaningfully by institutions of higher education (IHEs). Under this grant category, we intend to promote collaboration and better alignment between public elementary, secondary and postsecondary education systems by establishing a competitive preference priority for applications that include commitments from public IHEs or IHE systems to participate in the design and development of the SBAC's final high school summative assessments and to implement policies that exempt from remedial courses and place into credit-bearing college courses students who meet the SBAC-adopted achievement standard (as defined in the NIA) for those assessments. An application that addresses this priority will receive competitive preference points based on the extent to which it demonstrates strong commitment

from the public IHEs or IHE systems (as evidenced by letters of intent) and on the percentage of direct matriculation students (as defined in the NIA) in public IHEs in the states in the SBAC who are enrolled in those IHEs or IHE systems.

Maintaining open competition through non-proprietary approaches is a critical SBAC strategy. Contractor(s) are responsible for ensuring that these specifications result in a system that maintains or increases the opportunities for competition for future SBAC work. Vendors are hereby notified that they may be excluded from bidding on additional SBAC work if it is determined that their work has unfairly limited the ability of other vendors from competing on future SBAC RFPs.

4. OBJECTIVE AND SCOPE OF WORK

The work conducted under the contract(s) awarded through this RFP will require significant collaboration among all Contractor(s) involved in SBAC work and SBAC leadership (i.e., the Executive Director, Chief Operating Officer, the Executive Committee, the Item Development Work Group, the Performance Task Development Work Group, and the Accessibility and Accommodations Work Group). SBAC leadership must be involved in all communications involving more than one Contractor. Specific work to be done under the contract(s) includes:

1. Develop draft specifications for selected response and constructed response items for each grade level (Grades 3-8 and high school) for mathematics and English language arts.
2. Develop draft specifications for technology-enhanced items for each grade level (Grades 3-8 and high school) for mathematics and English language arts.
3. Develop draft specifications for performance tasks (Grades 3-8 and high school) for mathematics and English language arts.
4. Develop draft Style Guide for all stimulus materials, items, and tasks including any grade level considerations.
5. Develop draft Bias and Sensitivity Guidelines to guide development of stimulus materials, items, and tasks.
6. Develop draft Accessibility and Accommodation Guidelines to guide development of stimulus materials, items, and tasks.
7. Present the specifications and guides to appropriate SBAC members, work groups and committees for review and comment.
8. Revise the specifications and guides based on input from SBAC.
9. Present revised specifications and guides to appropriate SBAC members, work groups, and committees for review and approval.
10. Make final revisions specified by designated SBAC representatives.

11. Develop an electronic platform for specifications and guidelines with hot links between related components. The electronic platform must meet SBAC requirements for open source and non-proprietary products.
12. Provide final print versions of stimulus specifications, specifications for selected-response and constructed-response items, specifications for technology-enhanced items, specifications for performance tasks, style guide, bias and sensitivity guidelines, and accessibility and accommodations guidelines.
13. Provide the final version of the stimulus specifications in electronic format with appropriate links to item/task specifications, bias and sensitivity guidelines, accessibility and accommodations guidelines, and style guide.
14. Provide the final version of the item and task specifications for use in item and task development in electronic format with appropriate links to stimulus specifications, bias and sensitivity guidelines, accessibility guidelines, and style guide.
15. Provide the final version of the Style Guide in electronic format with appropriate links to stimulus specifications, item/task specifications.
16. Provide the final version of the Bias and Sensitivity Guidelines in electronic format with appropriate links to stimulus specifications, item/task specifications, and accessibility and accommodations guidelines.
17. Provide the final version of the Accessibility and Accommodations Guidelines in electronic format with appropriate links to stimulus specifications, item/task specifications, bias and sensitivity guidelines.
18. Provide documentation of research support for specifications set forth in the specifications and guides.
19. Provide documentation of links between specifications, guidelines, and Content Specifications.
20. Provide documentation of records of decision making for all aspects of work done.
21. Final documents and documentation should be provided in SBAC agreed-upon non-static formats.

All documents and products developed under the contract(s) derived from this RFP will be the intellectual property of the SBAC. Specifications documents and guides must be completed by no later than January 27, 2012, depending on execution date of corresponding service contract. We envision that the materials to be developed will constitute an encyclopedia of volumes designed to guide all of the SBAC assessment development work. Appendix A provides a Table of Contents for the specifications products to be developed to support the SBAC assessment development work.

5. STATE'S ROLE

As fiscal agent for the SBAC, OSPI will assume lead responsibility for the management of all contracting activities with the SBAC's Contractor(s) of choice. All work direction and expenditure decisions will come from the SBAC's Governing States, or as delegated by the Executive Director. All matters relating to contract and payment processing will be coordinated through OSPI.

6. VENDOR QUALIFICATIONS

Minimum Qualifications Bidders must demonstrate substantive experience developing item/ task specifications for selected response, constructed response, technology-enhanced items and/or performance tasks. Bidders must demonstrate experience with guidelines for bias and sensitivity and accessibility and accommodations. Bidders must also demonstrate a willingness to work in a collaborative manner with representatives from member states in the SBAC as well as other vendors who will take on aspects of the SBAC assessment development work.

- Licensed to do business in the State of Washington. If not licensed, provide a written intent to become licensed in Washington within thirty (30) calendar days of being selected as the Apparently Successful Bidder.
- Knowledge of formatting considerations for computer-based test administration
- Experience with development of short and extended constructed response items
- Experience with assessment of complex performances
- Experience with scoring rubrics and performance scoring procedures
- Knowledge of the characteristics of evidence-centered assessment design and development

Desirable Qualifications

- Knowledge of computer adaptive testing
- Knowledge of computer-based scoring of performances using artificial intelligence and automated scoring
- Knowledge of how technology can be used to enhance the quality of items so that they elicit responses that are close approximations to the desired constructs

7. PERIOD OF PERFORMANCE

The period of performance of any contract resulting from this RFP is tentatively scheduled to begin on or about **November 22, 2011** and end **no later than January 27, 2012**. The Contractor will be expected to augment the final deliverable at no additional cost in the event SBAC leadership identifies any element specified in the contract that is missing from the final deliverable. The option to extend any contract resulting from this procurement shall be at the sole discretion of OSPI.

If requested by the SBAC, OSPI reserves the right to amend to extend the contract for up to one (1) additional contract year through **January 25, 2013**. Decision to amend shall be based on sustained satisfactory performance as decided by the Superintendent's designee, successful completion of project objectives, and availability of funding.

Additional services that are appropriate to the scope of this RFP, as determined by OSPI, may be added to the resulting contract by a written amendment mutually agreed to and executed by both parties.

8. FUNDING

The budget for the Item and Task Specifications contract is set at a maximum of \$1,500,000 for the contract period. Specific information regarding the constructive bids in compliance with the listed budget can be found in Section C., Proposal Contents, Subsection 4., Cost Proposal area.

The funding for this contract has been secured through the U.S. Department of Education award to the State of Washington, acting as fiscal agent for the CONSORTIUM.

The Vendor shall provide their most favorable and competitive cost estimate to perform the work.

9. ADA

OSPI complies with the Americans with Disabilities Act (ADA). Vendors may contact the RFP Coordinator to receive this Request for Proposals in Braille or on tape.

Section B. GENERAL INFORMATION FOR VENDORS

1. RFP COORDINATOR

The RFP Coordinator is the sole point of contact in OSPI for this procurement. All communication between the Vendor and OSPI upon receipt of this RFP shall be with the RFP Coordinator, as follows:

Name:	Michael Middleton
Physical Address:	600 Washington Street South
Mailing Address:	Post Office Box 47200
City, State, Zip Code:	Olympia, WA 98504-7200
Telephone:	360.725.6434
Fax:	360.725-6240
Email Address:	Michael.Middleton@k12.wa.us

All communications concerning this RFP must be directed only to the RFP Coordinator via email. Any other communication will be considered unofficial and non-binding on OSPI. Vendors are to rely on written statements issued by the RFP Coordinator. Communication directed to parties other than the RFP Coordinator may result in disqualification of the Vendor.

2. ESTIMATED SCHEDULE OF PROCUREMENT ACTIVITIES – REPOST

Item	Action	Date
1.	OSPI Issues RFP	September 29, 2011
2.	Letter of Intent Due	October 10, 2011
3.	Proposals Due	October 14, 2011
4.	Evaluation of Written Proposals	October 18 – 21, 2011
5.	Announce “Apparent Successful Vendor” and Send Notification to Unsuccessful Vendors	October 26, 2011
7.	Debriefing Conferences (if requested)	October 31 and November 1, 2011
8.	Contract Negotiation	October 28 – November 7, 2011
9.	Contract Start Date	November 22, 2011

OSPI reserves the right to revise the above schedule.

3. LETTER OF INTENT

A Letter of Intent to Bid in response to this RFP, though not mandatory, is highly encouraged by OSPI as a means to ensure sharing communications regarding this solicitation. Those prospective bidders interested in participating in this RFP should plan to submit a Letter of Intent (to the RFP Coordinator identified above) by **4:30PM (Pacific Daylight Savings Time), Monday, October 10, 2011**. This letter may be sent via fax, email attachment, or postal or express courier service.

4. SUBMISSION OF PROPOSALS

Where Vendors choose to submit new materials due to the reissuance of this RFP, Vendors are required to submit twenty-one (21) copies of their proposal. One (1) copy must be hardcopy with original signatures while the remaining twenty (20) copies are to be provided electronically on compact discs (CD) or flash drives. The proposal, whether mailed or hand delivered, must be received by OSPI no later than **4:30 PM Pacific Daylight Time in Olympia, WA on October 14, 2011**. The proposal is to be sent to the RFP Coordinator at the address noted in Section B.1. The envelope should be clearly marked to the attention of the RFP Coordinator, who is OSPI's sole point of contact for this procurement.

Vendors mailing proposals should allow normal mail delivery time to ensure timely receipt of their proposals by the RFP Coordinator. Vendors who are hand delivering proposals should allow time for traffic congestion. Vendors assume the risk for the method of delivery chosen. OSPI assumes no responsibility for delays caused by any delivery service.

Late proposals will not be accepted and will be automatically disqualified from further consideration. The proposals must respond to the procurement requirements. Do not respond by referring to material presented elsewhere. The proposal must be complete and must stand on its own merits.

Failure to respond to any portion of the procurement document may result in rejection of the proposal as non-responsive. All proposals and any accompanying documentation become the property of OSPI and will not be returned.

5. PROPRIETARY INFORMATION/PUBLIC DISCLOSURE

Proposals submitted in response to this competitive procurement shall become the property of OSPI.

All proposals received shall remain confidential until the contract, if any, resulting from this RFP is signed by the Assistant Superintendent/designee and the apparently successful Bidder; thereafter, the proposals shall be deemed public records as defined in RCW 42.56.

Any information in the proposal that the Vendor desires to claim as proprietary and exempt from disclosure under the provisions of RCW 42.56 must be clearly designated. The page and the particular exception from disclosure upon which the Vendor is making the claim must be identified. Each page claimed to be exempt from disclosure must be clearly identified by the word "Confidential" printed on the lower right hand corner of the page.

OSPI will consider a Vendor's request for exemption from disclosure; however, OSPI will make a decision predicated upon RCW 42.56. Marking the entire proposal exempt from disclosure will not be honored. The Bidder must be reasonable in designating information as confidential. If any information

is marked as proprietary in the proposal, such information will not be made available until the affected proposer has been given an opportunity to seek a court injunction against the requested disclosure.

A charge will be made for copying and shipping, as outlined in RCW 42.56. No fee shall be charged for inspection of contract files, but twenty-four (24) hours' notice to the RFP Coordinator is required. All requests for information should be directed to the RFP Coordinator.

6. ADDENDA AND AMENDMENTS TO THE RFP

In the event it becomes necessary to revise any part of this RFP, addenda will be published on the OSPI website, at <http://www.k12.wa.us/RFP/>. For this purpose, the published Vendor questions and SBAC answers, and any other pertinent information shall be considered an addendum to the RFP and also placed on the agency website. Additionally, all addenda referred to above will be released on WEBS for all Vendors who are registered. It will be the responsibility of interested Vendors to check the website periodically for RFP addenda and updates.

7. MINORITY & WOMEN-OWNED BUSINESS PARTICIPATION

In accordance with the legislative findings and policies set forth in chapter 39.19 RCW, the State of Washington encourages participation in all of its contracts by firms certified by the Office of Minority and Women's Business Enterprises (OMWBE). Participation may be either on a direct basis in response to this solicitation or on a subcontractor basis. However, no preference will be included in the evaluation of proposals, no minimum level of MWBE participation shall be required as a condition for receiving an award, and proposals will not be rejected or considered non-responsive on that basis. Any affirmative action requirements set forth in federal regulations or statutes included or referenced in the contract documents will apply.

8. ACCEPTANCE PERIOD

Vendors must provide 90 days for acceptance by OSPI from the due date for receipt of proposals.

9. RESPONSIVENESS

All proposals will be reviewed by the RFP Coordinator to determine compliance with administrative requirements and instructions specified in this RFP. The Vendor is specifically notified that failure to comply with any part of the RFP may result in rejection of the proposal as non-responsive.

OSPI also reserves the right, however, at its sole discretion to waive minor administrative irregularities.

10. MOST FAVORABLE TERMS

OSPI reserves the right to make an award without further discussion of the proposal submitted. Therefore, the proposal should be submitted initially on the most favorable terms which the Vendor can propose. There will be no best and final offer procedure. OSPI does reserve the right to contact a Vendor for clarification of its proposal.

The Vendor should be prepared to accept this RFP for incorporation into a contract resulting from this RFP. Contract negotiations may incorporate some or all of the Vendor's proposal. It is understood that the proposal will become a part of the official procurement file on this matter without obligation to OSPI.

11. CONTRACT AND GENERAL TERMS & CONDITIONS

The apparently successful Vendor will be expected to enter into a contract which is substantially the same as the sample contract and its general terms and conditions attached as Exhibit B and Exhibit C, respectively. In no event is a Vendor to submit its own standard contract terms and conditions in response to this solicitation. The Vendor may submit exceptions as allowed in the Certifications and Assurances section, Exhibit A, to this solicitation. OSPI will review requested exceptions and accept or reject the same at its sole discretion.

12. COSTS TO PROPOSE

OSPI will not be liable for any costs incurred by the Vendor in preparation of a proposal submitted in response to this RFP, in conduct of a presentation, or any other activities related to responding to this RFP.

13. NO OBLIGATION TO CONTRACT

This RFP does not obligate the State of Washington or OSPI to contract for services specified herein. OSPI also reserves the right to cancel or to reissue the RFP in whole or in part, prior to execution of a contract without penalty.

14. REJECTION OF PROPOSALS

OSPI reserves the right at its sole discretion to reject any and all proposals received without penalty and not to issue a contract as a result of this RFP.

15. COMMITMENT OF FUNDS

The Contracts Administrator or Director of Financial Resources are the only individuals who may legally commit OSPI to the expenditures of funds for a contract resulting from this RFP. No cost chargeable to the proposed contract may be incurred before receipt of a fully executed contract.

16. STATEWIDE VENDOR PAYMENT REGISTRATION

Vendors awarded contracts as a result of this RFP will be required to register as a Statewide Vendor (SWV). The SWV file is a central contractor file maintained by the Office of Financial Management for use by Washington State agencies in processing contractor payments. This allows you, as a Contractor, to receive payments from all participating state agencies by direct deposit, the State's preferred method of payment. Effective April 30, 2011, all OSPI contractors will be required to register as a Statewide Contractor. Participation in direct deposit is optional. Please go to <http://www.ofm.wa.gov/isd/vendors.asp> for online registration.

17 INSURANCE COVERAGE

NOTE: Insurance coverage must be determined based on the risks and liability associated with the work to be performed, however the estimated dollar amount associated with the work may be taken into consideration. Make all appropriate changes to the Insurance clause in Exhibit B, General Terms and Conditions.

The Apparently Successful Bidder must comply with the insurance requirements identified in the Sample Contract General Terms and Conditions, Exhibit C.

The Contractor shall, at its own expense, obtain and keep in force insurance coverage which shall be maintained in full force and effect during the term of the contract. The Contractor shall furnish evidence in the form of a Certificate of Insurance that insurance shall be provided, and a copy shall be forwarded to OSPI within fifteen (15) days of the contract effective date.

Section C. PROPOSAL CONTENTS

The table on Page 18 identifies 5 distinct components of the specifications project. Bidders should prepare a technical proposal, management proposal and cost proposal separately for each of the components for which they are bidding to aid in fair evaluation of the competing bids.

Proposals must be submitted on eight and one-half by eleven (8 ½ x 11) inch paper size with tabs separating the major sections of the proposal. The Letter of Submittal, excluding the signed Certifications and Assurances shall be a maximum of one (1) page. The four major sections of the proposal are to be submitted in the order noted below:

1. Letter of Submittal, including signed Certifications and Assurances (Exhibit A to this RFP)
2. Technical Proposal
3. Management Proposal
4. Cost Proposal

Proposals must provide information in the same order as presented in this document with the same headings. This will not only be helpful to the evaluators of the proposal, but should assist the Vendor in preparing a thorough response.

Items in this section marked “mandatory” must be included as part of the proposal for the proposal to be considered responsive; however, these items are not scored. Items marked “scored” are those that are awarded points as part of the evaluation conducted by the evaluation team.

1. LETTER OF SUBMITTAL (MANDATORY)

The Letter of Submittal, the attached Certifications and Assurances form (Exhibit A to this RFP), and attached Contractor Intake Form (Exhibit D to this RFP) must be signed and dated by a person authorized to legally bind the Vendor to a contractual relationship, (e.g., the President or Executive Director if a corporation, the managing partner if a partnership, or the proprietor if a sole proprietorship). Along with introductory remarks, the Letter of Submittal is to include by attachment the following information about the Vendor and any proposed subcontractors:

- A.** Name, address, principal place of business, telephone number, fax number and email address of legal entity or individual with whom contract would be written;
- B.** The name of the contact person for this RFP;
- C.** Name, address, and telephone number of each principal officer (President, Vice President, Treasurer, Chairperson of the Board of Directors, etc.);
- D.** Legal status of the Vendor (sole proprietorship, partnership, corporation, etc.) and the year the entity was organized to do business as the entity now substantially exists;
- E.** Location of the facility from which the Vendor would operate; and
- F.** A detailed list of all materials and enclosures included in the Proposal;

2. INTRODUCTION (MANDATORY)

Vendors are asked to provide a brief (2-3 page) executive summary that demonstrates the Vendor’s understanding of the goals of the work to be completed, that demonstrates an understanding of the relationship between the work and the SBAC theory of action, and that introduces the Vendor’s expertise in relation to the work.

3. TECHNICAL PROPOSAL (SCORED)

The Technical Proposal must contain a comprehensive description of services including the following elements:

- A. Project Approach/Methodology** – Include a complete description of the Vendor’s proposed approach and methodology for all parts of the project. This section should convey the Vendor’s understanding of the proposed project. Vendors should prepare a technical proposal separately for each of the components for which they are bidding to aid in fair evaluation of the competing bids. **Any aspect of the technical proposal (A through F) that is common to all components should be presented once and referenced (as appropriate) in the technical proposals for each subsequent component.** Components are defined below.

Components of the Project

Component	Description
1	Traditional Assessment Elements and Project Oversight a. Oversight of contractors for all components and collaboration to include: i. Maintenance of timelines and benchmark deliverables ii. Collection and report of research basis of decisions iii. Collection and report of decision making records iv. Consolidation of all components of the Item/Task Specifications and Guides for final delivery b. Stimulus Specifications (Section 2.2) c. General specifications for all Items and Performance Tasks (Section 2.3) d. Specifications for Selected Response and Constructed Response Items (Section 2.4) including sample items to support specifications e. Style Guide (Section 2.7) f. Development of an electronic platform with hot links between relevant elements of the specifications and guides to make item writing efficient
2	Technology-Enhanced Items (Section 2.5) including sample items to support specifications
3	Performance Task Specifications (Section 2.6) including sample performance tasks to support specifications
4	Bias and Sensitivity Guidelines (Section 2.8)
5	Accessibility and Accommodations Guidelines (Section 2.9)

OSPI recognizes that no one Contractor may have the expertise to complete all of the work products. OSPI, on behalf of SBAC, will consider two options for structuring how best to accomplish the work. Option #1: A Prime Contractor with identified subcontractors who have demonstrated expertise in specific areas working in a collaborative effort. Option #2: Multiple, distinct Contractors and one Contractor who serves in an oversight function to manage the timelines, processes, collaboration, and deliverables.

Vendors may present proposals for the entire project or for components of the overall project. If a Vendor chooses to propose work involving subcontractors, the subcontractors must be identified. If a Vendor chooses to bid on one or more components of the project, the preceding table identifies the intended components.

- B. Work Plan** – Include all project requirements and the proposed tasks, services, activities, review cycles, etc. necessary to accomplish the scope of the project defined in this RFP. This section of the Technical Proposal must contain sufficient detail to convey to members of the evaluation team the Vendor’s knowledge of the subjects and skills necessary to successfully complete the project. *Include mechanisms for collaboration with SBAC staff, how meetings with SBAC work groups and the SBAC leadership team will be conducted (electronically and/or face to face) with a rationale for meeting strategies.* The Vendor may also present any creative approaches that might be appropriate and may provide any pertinent supporting documentation. *If the work plan involves the use of consulting experts or subcontractors, the Vendor will explain why consulting experts are needed and what role they will play in accomplishing the work described under this RFP.*

The ultimate purpose of specifications and guidelines is to strengthen the SBAC validity argument in an evidence-centered design. Mathematics and English-Language Arts Content Specifications are central to the validity argument of the SBAC assessment system. The Content Specifications establish claims that the scores from the summative and interim assessments must be able to support. They reflect a break from conventional testing paradigms that focus on discrete connections between items/tasks and standards. Vendor(s) are expected to describe how they will use the claims and assessment targets stated in the mathematics and English language arts Content Specifications documents (Appendices B and C) to guide their work.

- B. Project Schedule** – Include a project schedule indicating major milestones, when the elements of the work will be completed, and when deliverables will be provided. Major milestones include the tasks and deliverables listed in section B.4 above and all necessary iterative loops. Review cycles (at a minimum) will include reviews and approval by multiple levels of SBAC leadership (e.g., primary work groups, secondary work groups, governing states, executive committee).
- C. Deliverables** – Fully describe deliverables to be submitted under the proposed contract.
- D. Outcomes and Performance Measurement** – Describe the impacts/outcomes the Vendor proposes to achieve as a result of the delivery of these services including how these outcomes would be monitored, measured and reported to SBAC.

Please Note: Mere repetition of the work statement in Section 1 or the activities described in this RFP will not be considered responsive.

E. Risks

Define risks you identify as being significant to the success of the project. Include how you would propose to effectively monitor and manage these risks, including reporting of risks to the SBAC's contract manager.

The following information will assist Vendors in ensuring that their proposals meet the SBAC expectations.

Expected Work Statement

This section of the RFP presents the technical requirements for proposals to write specifications for the four types of items/tasks intended to assess the Common Core State Standards (CCSS) for the SMARTER Balanced Assessment Consortium (SBAC) as well as a Style Guide, Bias and Sensitivity Guidelines, and Accessibility and Accommodation Guidelines.

Background

This RFP is intended to result in the selection of one or more Vendors who will write specifications for critical elements in the SBAC assessment system and provide research support for these specifications.

- Specifications for stimulus materials will be detailed enough that distinct groups will select or develop similar stimuli to elicit students' understanding and skills.
- Specifications for test items will be detailed enough that distinct groups of item writers could generate parallel items for any given content standard.
- Specifications for performance tasks will be detailed enough that distinct groups of writers would generate parallel sets of directions and materials for the same targeted performance.
- The Style Guide will be detailed and thorough enough that publishers in distinct locations will produce materials that have identical display and physical characteristics.
- Bias and Sensitivity Guidelines will result in common standards for minimizing bias and insensitivity regardless of who is generating stimulus materials, writing test items, or designing performance tasks.
- Accessibility and Accommodations Guidelines will ensure that all assessment materials and strategies ensure equitable opportunities for all students, including English learners (ELs) and students with disabilities (SWDs), to demonstrate what they know and are able to do in relation to content standards.

Appendix A presents a Table of Contents for the materials to be developed as a result of this RFP. The SBAC members have been meeting for a year to generate initial ideas about what the summative and interim assessments will look like; however, there is still much work to be done. The Contractor(s) involved in this effort will work closely with the key work groups of the SBAC in the development of these specifications. The Contractor(s) must be prepared for intensive collaboration and tight schedules. Contractor(s) will have to be flexible and able to respond quickly to ideas as they emerge from work groups. Contractors will also work together to ensure that all aspects or sections of the specifications volumes are consistent and form a cohesive encyclopedia.

Appendices B and C are drafts in progress of the SBAC Content Specifications for English language arts and mathematics. Content Specifications operationalize the ways in which the Common Core State Standards (CCSS) will be assessed. The Vendors are expected to use the drafts of the Content Specifications to inform their proposal writing process. The Contractor(s) are expected to use the Content Specifications to inform the development of the item/task specifications.

Throughout this document, outlines of specifications are provided. These outlines are intended to set a floor rather than a ceiling on the specifications to be developed. They represent the level of detail expected; however, SBAC expects Vendors to provide examples of specifications that exceed these examples in quality and usefulness. These outlines do not imply that content decisions or testing decisions have been made and do not supersede the SBAC Content Specifications.

Vendors are expected to demonstrate their capacity to write specifications that reflect new assessment strategies – that stretch assessment methodology beyond its current state. Vendors should provide a range of examples of the types of specifications and guidelines they have developed in the past to assist in evaluating Vendor capabilities. These examples will demonstrate the Vendors' capacity to develop specifications and guidelines and to contribute to the transformation of summative assessment practices. Evaluation criteria are included that reward Vendors who propose ideas and strategies that extend beyond those provided as examples in this document. SBAC seeks Vendor-partners who are ready and willing to reach beyond state-of-the-art practices and propose innovative models that advance the field of measurement and improve the validity of item and task scores. SBAC expects Vendors to leverage their own internal assessment expertise as well as that of the entire field of assessment and measurement.

Evidence-Centered Design

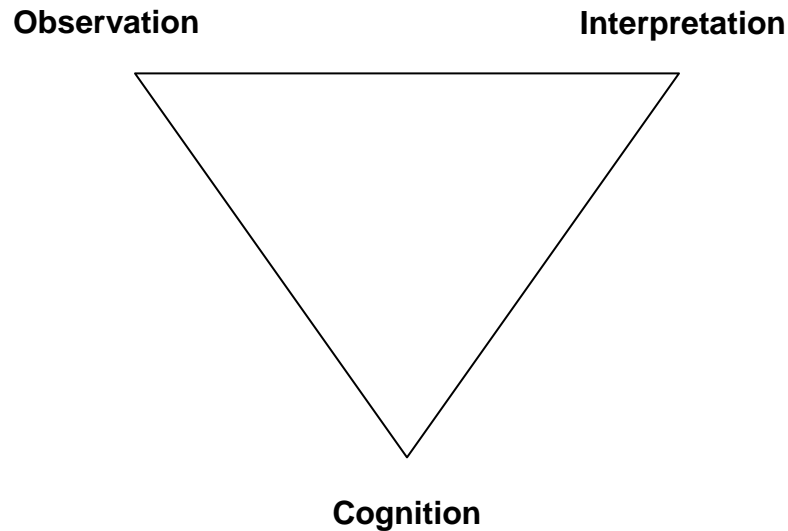
The SBAC assessment system is grounded in the idea of evidence-centered design. As Mislevy, Steinberg, and Almond (2003) state,

What all assessments share... is reasoning that relates the particular things students say or do, to what they know or can do as more broadly conceived; that is, in terms that have meanings beyond the specifics of the immediate observations. The argument behind such reasoning is grounded in beliefs about the nature of knowledge in the domain in question, how we recognize it when we see it, and situations in which evidence about that knowledge might be manifest. This...concerns relationships among (a) the claims one wants to make about students in order to serve an assessment's purpose; (b) the principles upon which this reasoning is based; and (c) the "pieces of machinery" – tasks, responses, rubrics, statistical routines, score reports, and the like – that one assembles to gather evidence to support claims about students. (p. 2).

In an evidence-centered design for the SBAC assessments, determining the targeted knowledge and skills found in the CCSS and determining the content and item specifications are the first two steps in establishing evidence of the connection between the standards and students' performances. The National Research Council (2001) has described an evidence-centered design framework as follows:

The process of reasoning from evidence can be portrayed as...an assessment triangle. As shown below, the corners of the triangle represent three key elements that underlie any assessment: (1) a model of student cognition and learning in the domain, (2) a set of beliefs about

the kinds of observations that will provide evidence of students' competencies, and (3) an interpretation process for making sense of the evidence (p. 296).



Records of Decision Making

The Contractor(s) is/are responsible for making and keeping records of all decisions made during contract activities (e.g., reviews, decisions, conference calls). These records will be presented to work groups in a timely manner (i.e., at least weekly) for review and confirmation of content. The Contractor(s) will maintain version control (e.g., time/date stamps) of documents processed.

Components of the Specifications

Section 2.1 presents an overview and definition of the item and task types to be developed for the SBAC summative assessments. Sections 2.2 through 2.6 describe expectations for item and task specifications. Section 2.7 describes expectations for a Style Guide. Section 2.8 describes expectations for Bias and Sensitivity Guidelines. Section 2.9 describes expectations for Accessibility and Accommodation Guidelines. **Although these components are identified as distinct aspects of the SBAC specifications and guidelines for the summative and interim assessments, Vendors are expected to identify conceptual interdependencies among the components and indicate how they will plan for and address these interdependencies in the work plan. In addition, it is expected that the final specifications and guidelines will be available in an electronic platform with hot links between relevant aspects. Item writers will need easy access to stimulus specifications, item specifications, bias and sensitivity guidelines, and accessibility and accommodations guidelines based on specific interdependencies among these components. The specifications, guidelines, and the electronic platform itself must be flexible enough that each can 'grow' and 'evolve' as items/tasks are field tested.**

2.1 Overview of SBAC Items and Tasks

The SBAC Item and Task Specifications Documents will provide detailed requirements for writing four types of items and tasks: selected response items, constructed response items, technology-enhanced items, and performance tasks. The SBAC Item Development and Performance Task Work Groups have defined these item/tasks types as follows:

The comprehensively designed SBAC assessment system strategically uses a variety of item types (i.e., selected response items, constructed response items, technology-enhanced items, and performance [tasks]) to assess the full range of the Common Core State Standards (CCSS) with an emphasis on problem solving, analysis, synthesis, and critical thinking. ... The primary sources of information ... are the *SBAC Final Narrative* (6/20/2010) and the *West Ed's Research Supported Guidance for the Development of a Comprehensive Assessment Framework Based on the Common Core State Standards* (9/30/2010).

The development of assessment items considers the access needs of the vast majority of students (e.g., cognitive, processing, sensory, physical, language). Each of the item types will incorporate accessibility features (e.g., magnification, audio representation of graphic elements, linguistic simplification, text-to-speech, [speech to text], and Braille) that will couple with the system technology, test structure, and test delivery.

Selected Response Items (SR) contain a series of options from which to choose correct responses. SBAC's emphasis will be on the development of items that reflect important knowledge and skills consistent with the expectations of the CCSS across the Depths of Knowledge (i.e., Recall/Literal Comprehension, Interpretation/Application, and Analysis/Evaluation). Carefully constructed and reviewed selected response items will allow students to demonstrate their use of complex thinking skills, such as formulating comparisons or contrasts; identifying cause and effects; identifying patterns or conflicting points of view; categorizing, summarizing, or interpreting information. The appropriate and judicious use of selected response items provides for a cost-effective means to address content in terms of test development, administration, and scoring.

Selected response items will measure one or more content standard(s). A single SR item will not measure content standards in both mathematics and English language arts. For selected response items that are multiple choice, there will be up to four possible answers [options] (e.g., one correct answer [key] and three wrong answer choices [distractors]). Selected response items should include, but not be limited to, multiple-choice items.

Constructed Response (CR) is a general term for items requiring the student to generate a response as opposed to selecting a response. Both short and extended constructed response items will be used. Short constructed response items may require test-takers to enter a single word, phrase, sentence, number, or set of numbers, whereas extended constructed response items will require more elaborated answers and explanations of reasoning. These kinds of constructed response items

... allow students to demonstrate their use of complex thinking skills such as formulating comparisons or contrasts; proposing cause and effects; identifying patterns or conflicting points of view; categorizing, summarizing, or interpreting information; and

developing generalizations, explanations, justifications, or evidence-based conclusions (Darling-Hammond & Pecheone, 2010). These complex thinking skills are consistent with the expectations for college and career readiness and will be included in both the English language arts and mathematics assessments. (SBAC RTTT Proposal, p. 53)

Constructed response items will measure one or more content standard(s). A single CR item will not measure content standards in both mathematics and English language arts. It is expected that constructed response items will generally be scored by computer, using Artificial Intelligence (AI) models as appropriate, with human backup scoring for validation

Technology-Enhanced (TE) Items The SBAC Item Development Work Group has defined technology enhanced items as follows.

Technology-Enhanced Items_employ technology to:

- Present information to the student (e.g., through animations, simulations, online access to information, video or audio stimulus, moveable models), and/or
- Elicit a response from the student (e.g., selecting one or more points on a graphic, dragging and dropping a graphic from one location to another, manipulating a graph)..., and/or
- Collect score responses which are scored against an answer key for [MC] or static CR items; or objective score criteria for dynamic CR [or other scoring mechanisms as designed].
- TE Items employ technology to assess content, cognitive complexity, and Depth of Knowledge not assessable otherwise. Because of the cost in development, scoring, and ongoing calibration, SBAC will employ TE in situations in which static SR and static CR are inadequate.
- The ultimate goal of TE items is to provide better measurement of student knowledge and skills through technology.

The effective use of technology will expand the nature of the content that can be presented as well as the knowledge, skills, and processes that can be assessed (Quellmalz & Moody, 2004). Technology-enhanced items will take advantage of drag-and-drop, hot spot, drawing, graphing, gridded-response items (which generally have numerical answers where students can key-in responses), and simulation technologies, along with the use of online tools to measure content that was previously not assessed or was assessed through constructed response item formats requiring more elaborate scoring procedures. While most of the work with the technology-enhanced items has been done in the area of science, SBAC will develop technology-enhanced items in both English language arts and mathematics. For example, a video presentation of a speech could be combined with a reading passage to provide students the opportunity to integrate reading and listening skills per the CCSS and evaluate content across diverse media.

Technology-enhanced items will measure one or more content standard(s). A single TE item will not measure content standards in both mathematics and English language arts.

Performance Tasks are defined in the SBAC RTTT application as follows:

[Performance tasks]...will provide a measure of the student’s ability to integrate knowledge and skills across multiple [content] standards—a key component of college- and career readiness. Performance [tasks] will be used to better measure capacities such as depth of understanding, research skills, and complex analysis, which cannot be adequately assessed with [selected response] or constructed response items. (p. 42).

The SBAC Performance Task Work Group has identified the following essential characteristics;

A performance task must

- Integrate knowledge and skills across multiple content standards or English language arts strands/mathematics domains;
- Measure capacities such as depth of understanding, research skills and/or complex analysis with relevant evidence;
- Require student-initiated planning, management of information and ideas, and/or interaction with other materials;
- Require production of more extended responses (e.g., oral presentations, exhibitions, product development), in addition to more extended written responses that might be revised and edited;
- Reflect a real-world task and/or scenario-based problem;
- Lend itself to multiple approaches;
- Represent content that is relevant and meaningful to students;
- Allow for demonstration of important knowledge and skills, including those that address 21st century skills such as critically analyzing, synthesizing media texts;
- Focus on big ideas over facts;
- Allow for multiple points of view and interpretations;
- Require scoring that focuses on the essence of the task;
- Reflect one or more of the Standards for Mathematical Practice, Reading and Writing (or Speaking and Listening) processes; and
- Seem feasible for the school/classroom environment.

Bias and Sensitivity Guidelines and Accessibility and Accommodations Guidelines

are presented as separate components in the RFP/SOW. These guidelines will be both stand alone documents. However, they must be integrated as appropriate into all sets of specifications. It is critical that stimuli, items, and tasks consider accessibility to the broadest range of students, including ELs and SWDs.

Summary

The four item/task types to be included in the summative and interim assessments will, in the aggregate, assess all of the content standards and must be aligned with the assessment targets stated in the Mathematics and English Language Arts Content Specifications (Appendices B and C). Some standards are better measured in selected response format; some standards are better measured in constructed response format. Technology-enhanced items provide better measurement of student knowledge and skills through technology. Finally, performance tasks allow for the assessment of real-world applications of content standards.

The Vendor(s) will document the research supporting the structure and function of each item/task type, including any substantive research on best, current, and potential practices relevant to the specific item/task types, stimulus materials, accessibility and accommodations, and bias/sensitivity considerations. Stimulus Specifications, Item and Task specifications, Style Guides, Bias and Sensitivity Guidelines, and Accessibility and Accommodations Guidelines set the boundaries around each of the types of items/tasks in order to ensure that the item development process is efficient and consistent (as appropriate).

Vendors must explicitly describe how they will use the Content Specifications (Appendices B and C) to guide their efforts to generate specifications that support the validity claims related to the assessment targets stated in the Content Specifications. Vendors should expect to bring their expertise and that of the assessment field to the table in making recommendations about characteristics to be included in the specifications documents that go beyond those suggested in this document, as appropriate.

Introduction to Sections 2.2 through 2.9

Several types of specifications will guide the SBAC assessment development work: content specifications, stimulus specifications, item/task specifications, the Style Guide, Bias and Sensitivity Guidelines, and Accessibility and Accommodation Guidelines. Content specifications explain how the Common Core State Standards will be operationalized in the assessments. Content specifications are presented in Appendices B and C. Vendors are expected to closely reference the content specifications when generating item and task specifications.

The item and task specifications will be structured in several sections (see Appendix A for the Table of Contents):

- General specifications that apply to *all* items, tasks, or stimulus materials in the SBAC assessments
- General specifications relevant to specific item/task types
- Specifications that are unique to a specific item type measuring a particular target (i.e., content standard or performance).

The next sections present the details expected in the item and task specifications. Section 2.2 describes elements that are the minimal expectations in specifications for stimulus materials. Section 2.3 presents the minimal expectations for specifications that apply to all items and tasks – selected response, constructed response, and technology-enhanced items, as well as performance tasks. Section 2.4 describes the elements that are the minimal expectations in specifications for selected

response and constructed response items. Section 2.5 describes the elements that are the minimal expectations in specifications for technology-enhanced items. Section 2.6 describes the elements the minimal expectations in specifications for performance tasks.

Section 2.7 presents minimal expectations for a Style Guide. Section 2.8 presents the minimal expectations for Bias and Sensitivity Guidelines. Finally, section 2.9 presents the minimal expectations for Accessibility and Accommodations Guidelines. In addition to the specific expectations given in Sections 2.2 through 2.9, Vendors are expected to recommend categories of specifications that are supported by current research and best practices in the field. Responses should include reference to the theoretical foundation for proposed categories, either in the form of a brief review of literature or theory-of-action description. This type of rationale should be provided for each proposed category of specification. Documentation of supporting research for all specifications is an expected product of this contract.

Section 2.2: Stimulus Specifications

Specifications for Stimulus Materials set boundaries (e.g., topics, features, layouts) on the materials that can be used to draw out students' knowledge and skills. Boundaries are informed by factors such as grade level of students, disciplinary characteristics, cultural sensitivity issues, familiarity based on socio-economic status, region, or other demographic variables. The Stimulus Specifications will present detailed specifications for each category of stimulus, fine-tuned, as appropriate, for each content area and grade level or grade-level band.

Figure 2-1 presents an initial list of categories for stimulus materials that the Vendor is expected to detail in the Stimulus Specifications. This list is illustrative and not an exhaustive listing of allowable stimulus materials. These categories are for the purposes of orienting Vendors. However, we expect vendors to bring their own expertise and knowledge from the field to help push the envelope on "what can be" as opposed to "what is or has been." Other stimulus materials may be relevant that have not been listed in Figure 2.1. Vendors are expected to propose additional categories of stimulus materials and develop plans to detail features of those additional categories. Evaluation criteria include points for innovations that advance the field of assessment and lead to improvements in the construct validity, relevance, and utility of scores derived from the assessment tools. Vendors should also plan to include, in the Stimulus Specifications, recommended adaptations to accommodate students with specific disabilities.

Stimulus materials will also be addressed in item/task specifications in two ways:

- Characteristics of stimulus materials that are specific to a given content standard at a given grade level: For selected response, constructed response, and technology-enhanced items, item specifications will indicate which stimulus materials are appropriate for the given content standard at a given grade level. Sections 2.4 and 2.5 indicate how the Contractor(s) will address stimulus materials related to content standards.
- Characteristics of stimulus materials that are specific to a particular type of performance task at a given grade level: For performance tasks, specifications will indicate which stimulus materials are appropriate for the given performance. Section 2.6 indicates how the Vendor(s) will address stimulus materials related to performance tasks.

Stimulus Metadata

The Vendors will propose categories for codifying all stimulus materials in terms of metadata that will be useful for test building. Stimulus metadata codes may be numbers or brief labels. For example, reading passages should have records of grade level, topic, passage type (e.g., literary, informational, poetry), length, complexity level (as described in Content Specifications), links to other stimulus materials, copyright status, sources, etc. As another example, graphs should be coded in terms of grade level, type of graph (e.g., pictograph, circle graph, bar graph, line graph, box and whisker), content (e.g., favorite pets, favorite fruit, average daily attendance, dropout rate), complexity (e.g., double line, stacked bars), links to other stimulus materials, etc.

Figure 2-1: Elements of Specifications for Stimulus Materials

Introductions – complexity level, syntactic structure, acceptable names of stimuli (e.g., folk tales and legends [be culturally sensitive here and use the appropriate label for the culture], passage, story, biographical sketch, names of graphs, names of graph features), format (e.g., reference to relevant items (e.g., numbers, old faced, font, type size)

Tables – number of rows and columns by grade level, rules for titles of tables, columns, rows, font, font size, size on page, etc.

Graphs – types of graphs, rules for titles of graphs, axes, numbers of variables represented in a graph, number of data points, range of scale, font, font size, size on page, how to mark the origin, etc.

Passages – complexity level (as described in the Content Specifications), font, type size, allowable length, acceptable and unacceptable topics, features that must be included (e.g., clear thesis or theme, complexity level, above grade level vocabulary with sufficient context to reveal possible meaning), a range of social studies, science, and media texts, titles, authorship, allowable text features (e.g., footnotes, glossary, bibliography, introductory background information, levels of allowable headings and subheadings, paragraphing), how displayed in relation to items(s) or tasks (e.g., displayed first, prior to items, then next to item with vertical scroll bar with passage taking 60% of vertical screen)

Reading Graphics – Allowable supporting graphics for passages, labels for graphics, connections between graphics and text (e.g., embedded, supporting, separate source of information), complexity of graphics

Audio/video– Allowable audio and video materials (e.g., PowerPoint presentations, video clips, radio news stories), allowable length, acceptable and unacceptable topics, features that must be included in each genre (e.g., characteristics of PowerPoint presentations; titles, credits, and introductions in video clips; introductions to news stories), a range of social studies, science, media texts, authorship, allowable graphics, how presented in relation to items or performance tasks

Scenarios – Allowable scenarios for performance tasks involving investigations and/or integration of reading, writing, speaking and/or listening including allowable investigation topics, allowable combinations of text, data, graphics, and video, allowable vocabulary, how unfamiliar vocabulary will be addressed, features that must be included (e.g., introduction, background context, statement of investigative question, a range of social studies, science, and media texts

Pseudo Web Pages – Allowable structures for pseudo web pages (e.g., layout, tabs, hot links, mouse overs, text, graphics, embedded video clips, wiki features)

Figures – acceptable characteristics of geometric figures by grade level (e.g., types, labels, conventions for abbreviations of measurement units on figures)

Figure 2-1 (Continued): Elements of Specifications for Stimulus Materials

2D and 3D grids – number of dimensions on paper, number of dimensions on computer, number of cells per grade level, allowable number of data points, etc.

Patterns – rules for how many elements can be included in a graphic or numeric pattern, rules for what patterns are allowable (e.g., AB, ABB, ABC, ABBA, change by one operation, change by two operations, linear change, exponential change), and so forth by grade level

Formulas – allowable formulas, placement of formulas (with items, separate reference page, via search engine) by grade level

Manipulatives and tools – allowable manipulatives and tools (e.g., rulers, calculators, fraction tiles) and how provided (e.g., real, computer simulated, paper representation) by grade level

Diagrams – allowable diagrams, elements in diagrams, how diagrams will be labeled and titled, etc.

Rules for introductions to stimulus materials – specifications will indicate how stimulus materials will be introduced (e.g., Look at the graph. Read the chart. Read the passage; then answer numbers 3 through 8.)

Specifications for additional categories of stimulus materials recommended by the Contractor(s)

2.3 General Specifications for all Items and Performance Tasks

In what follows, we describe the general characteristics for all items/tasks that a Contractor are expected to detail. As with other sections of the technical proposal, these ideas are intended to set a floor rather than a ceiling for specifications to be developed. Evaluation criteria include points for ideas that advance the field of measurement in ways that improve the overall validity of scores derived from the assessment tools.

Grade Appropriateness – Item and task specifications will be written for each content area (mathematics and English language arts). General specifications will set developmental boundaries for stimulus materials, features and contexts of test items/tasks, available tools and resources, etc. for the individual grade levels or grade-level bands. Vendors will plan to write specifications that address a smooth progression across a continuum of grades using the Content Specifications (Appendices B and C) as guidance.

Calculator Use – General specifications should include specifications for the use of calculators and the kind of calculators allowed for the specific grade levels. Item/task specifications should also address calculators as relevant to the content standard (e.g., if the focus of the item is on estimation, calculators will not be allowed).

Vocabulary and Language – General specifications will present rules for vocabulary by identifying allowable disciplinary vocabulary as well as rules for the types of vocabulary that should be avoided (e.g., idioms, regionalisms, specialized non-disciplinary vocabulary). Specifications for vocabulary are informed by the language in the Common Core State Standards, SBAC Content Specifications for mathematics and English language arts, resources that provide data on grade level vocabulary, rules of propriety, and research on the results of bias and sensitivity issues. Item and task specifications will also address the vocabulary issues that are relevant to a particular content standard or a particular type of performance task.

Item/task specifications will also define acceptable linguistic structures for introductions, titles, captions, item stems, answer choices, directions for tasks (e.g., subject-verb-object (SVO) sentences, no use of the word “not” unless measuring logic). Contractor(s) will use research on linguistic complexity and linguistic simplification to justify linguistic specifications.

Complexity guidelines for items – Specifications will indicate the expected structural and cognitive complexity of items and tasks by grade level.

Mathematics Formulas and Tools – General specifications will indicate how mathematics formulas and tools will be addressed in the assessments (e.g., whether formulas will be provided to students, how formulas will be presented to students, how tools and manipulatives will be made available to students). These specifications are expected to vary by grade level or grade-level bands.

English Language Arts Tools – General specifications will indicate how English language arts tools will be addressed in the assessments (e.g., what tools are allowable depending on the target for assessment (reading, writing, speaking and/or listening); how tools will be made available to students). These specifications are expected to vary by grade levels or grade-level bands.

Formatting – In addition to style guidelines, there may be formatting issues that item writers must attend to while writing items (e.g., underlining key words, bulleted directions). Vendor(s) will plan to include format considerations in the item specifications that are not considered in the general Style Guide.

Item Metadata – Vendor(s) will propose categories for codification of items to aid in test building. Item metadata codes may be numbers or brief labels. Item metadata will include the content standard, the subskill within a content standard, Depth of Knowledge (DOK) ranking, performance level descriptor, topic/context of item, etc. Specifications will indicate how item writers will record all codes for items.

Section 2.4 – Specifications for Selected Response and Constructed Response Items

This section presents expectations for specifications for selected response and constructed response items that go beyond the general considerations described in Section 2.2. Vendors should note that the ideas presented set a baseline for expectations for item specifications; the minimum rather than the maximum. Vendors should propose ideas for specifications that have not been addressed below. Evaluation criteria include points for innovations that advance the field of assessment and improve the overall validity of scores from the assessment tools.

2.4.1 General Specifications for Selected Response and Constructed Response Items

In addition to the general specifications that apply to all items and tasks (see Section 2.3), selected response (SR) and constructed response (CR) item specifications will describe general characteristics that apply to all SR and CR items. General specifications for SR and CR items will include the following:

General rules for selected response (SR) items – Specifications will include rules for selected response items such as degree to which the item stem presents a complete problem or question (i.e., whether or not students have to read answer choices to know what is being asked); sentence structure (e.g., SR items may ask questions or give directions; use simple subject-verb-object sentences; avoid dependent clauses, use open or closed stems); the maximum length of stems; the maximum number of sentences; the structure of answer choices; the maximum length of answer choices; the number of answer choices, order of answer choices in different situations; the difficulty of answer choices, etc. Specifications will also indicate how answer choices will be annotated by item writers to indicate their purpose or focus. Figure 2-2 presents examples of general rules for CR items to give Vendors an idea of what is expected for SR items.

General rules for constructed response (CR) items – Specifications for CR items such as the maximum length of stems, the maximum number of sentences, the allowable degree of complexity (e.g., number of steps to complete task); the range of possible points, allowable length of expected responses; sentence structure (e.g., CR items give directions rather than asking questions); use simple sentences (subject-verb-object); avoid dependent clauses. Figure 2-2 presents an example of rules for CR items that might be included in the general characteristics section of the item specifications.

Figure 2-2: Example of General Rules for CR Items

- Constructed response items will give clear indications of what is required of students; e.g., “Give two words.” or “Write an equation.”
- Constructed response items will ask for responses beyond memorized facts or definitions.
- Constructed response items will require application of higher order thinking skills, applications of concepts and skills, and/or demonstrations of processes or procedures.
- Anything required by the scoring rubric will be asked for in the item.
- Spaces for item response will be carefully scaffolded to guide responses. A response that requires multiple parts will be presented with boxes to draw attention to the parts.
- Constructed response items may require students to organize information, explain choices, support claims, or verify arguments, conclusions, solutions, and thinking, etc.
- Constructed response items may ask for a figure, diagram, equation, explanation, and/or a few sentences. Item specifications for content standards will indicate the acceptable range of response types allowable for a given content standard.

Types of responses expected from student responses to CR items – Specifications will detail the expectations for students’ responses to CR item prompts including length if applicable (e.g., one word/number to two sentences), range of possible responses (e.g., graphs, diagrams, complete sentences, equations), the focus of responses (e.g., correct/incorrect answers, inferences/interpretations/conclusions), etc.

Rules for scoring rubrics for CR items – Specifications will provide detailed specifications for how item specific scoring rubrics will be written. A central aspect of the validity argument is the validity of item scores. Care must be taken to ensure that scores mean what they are intended to mean. Specifications will present generic rules that apply to all scoring rubrics for constructed response items. These rules will outline the characteristics of all item specific rubrics and how they are related to items. Figure 2-3 presents an example of rules for scoring rubrics for CR items. The general rules for scoring rubrics will indicate the number of score levels based on the recommendations from the Content Specifications.

Figure 2-3: Example General Rules for Scoring Rubrics

- A generic scoring rubric will be developed for each item type within English language arts and mathematics.
- An item-specific scoring rubric will be developed for each constructed response item during the writing of the item.
- Item specific scoring rubrics will be developed based on the generic scoring rubric for each constructed response item.
- Item specific scoring rubrics will be aligned with the demands of the relevant item; scoring rubrics will not evaluate any understanding or skill that is not explicitly demanded by the item stem or directions.
- Score for a response is based on overall quality and accuracy in relation to the content standard(s).
- Individual score point elements will be based on the requirements of the item and its content standard(s).

Generic scoring rubrics – Specifications will provide generic scoring rubrics to guide the writing of item specific scoring rubrics. The purpose of generic rubrics is to ensure that item specific rubrics focus on appropriate aspects of students’ responses based on the content standard(s) the item is intended to assess. For example, an item measuring students’ ability to represent a mathematical idea should be evaluated in terms of the quality of students’ representation rather than accuracy of mathematical procedures used. Generic rubrics help to ensure that item writers write item-specific rubrics that focus on the appropriate aspects of responses.

Limits of items and tasks – Specifications will indicate any limits to what items can ask of students (e.g., Items will not ask for definitions of mathematical terms).

Expected length of time to complete items – Specifications will set an upper limit on the amount of time expected for students to complete SR and CR items, including processing stimulus materials, by grade level.

Allowable topics/contexts for stand-alone items – Specifications will set boundaries on the types of contexts or topics that can be used for stand-alone items (e.g., items will avoid contexts that involve competition, fast food, candy).

Allowable number of items per stimulus type – Specifications will indicate how many items can be associated with a single stimulus by grade level (e.g., There will be no more than seven reading items for a single passage.).

Allowable number of stimuli per item – Specifications will indicate how many stimuli and what types of stimuli students can process to respond to a single item (e.g., Reading items may ask students to integrate ideas/data from no more than two passages.).

Allowable range of standards assessed per stimulus type – Specifications will indicate the range of standards that can be assessed in relation to a stimulus at a single time by grade level (e.g., Each item related to a passage will measure a different reading standard. Each item related to a single graph will measure a different statistics standard.).

Other characteristics as recommended by the Contractor – Contractors are expected to propose additional categories for general specifications for SR and CR items based on their experiences, the state of the field, and factors that will push the field in ways that enhance the validity of item scores.

2.4.2 Features of Detailed Specifications for SR and CR Items Measuring Content Standards

The following paragraphs describe the characteristics that should be included in item specifications for selected response and constructed response items for specific content standards.

Item Types – Specifications will identify which item formats (constructed response, selected response, and/or technology enhanced) are most appropriate for measuring content standard(s) . Vendors will then develop specifications for each item format. For example, if a given content standard can be measured via all three item formats, item specifications will indicate how the content standard will be assessed in each of the item formats. See Appendix A for expectations regarding the number of different specifications documents expected.

Allowable stimulus materials – Item specifications will list all stimulus materials that are appropriate for assessing a given content standard.

Boundaries of stimulus materials – If there are any boundaries on stimulus materials for the specific content standard, item specifications will describe those boundaries.

How examinees will use stimulus material – Specifications will indicate how students are to use stimulus materials in their responses (e.g., students will cite specific evidence from the text to support their claims).

Vocabulary and Language – Item specifications will identify content specific vocabulary and language that may be used within the items for content standard(s). Items will not measure definitions of vocabulary words. Note, general specifications for all items should address any vocabulary limits that are not specific to the content standard.

Allowable manipulatives/tools – Specifications will indicate which manipulatives/tools are allowable for the given content standard.

Formulas – Item specifications for given content standard(s) will indicate the formulas that are expected to be used in items for the given content standard(s).

Answer Choices – Specifications will identify the characteristics of all answer choices (e.g., length, order) as well as the specific characteristics of correct answers for each subskill within each content standard. Specifications will describe the characteristics of incorrect answer choices (e.g., common errors shown in incorrect answers) for each content standard.

Constructed responses – Constructed response items allow students to supply their own answers to items. Responses will range from simple (e.g., one word/number responses) to complex (e.g., complete a graph, summarize a passage). Specifications will indicate allowable constructed responses for each subskill within each content standard as outlined in the Content Specifications. Where possible, a range of reasonable responses for the same content standard should be made available (e.g., table, Venn diagram).

Limitations to items – Specifications will indicate any limits to items based on grade level of students or other considerations that influence valid assessment of the content standard(s).

Integrated Items – Integrated items measure more than one content standard. Using the mathematics and English language arts Content Specifications, Contractor(s) will identify specific combinations of content standards that are to be integrated. Specifications for integrated items will include all of the characteristics included in specifications for items measuring a single content standard.

For integrated items, specifications will give details about acceptable structures for stems or prompts that ask for integration of knowledge or skills. Specifications for integrated CR items will indicate how prompts will be written to ensure that all relevant content standards are represented in students' responses. Specifications for integrated items will indicate how SR answer choices will be written to ensure that all targeted content standards are represented in the answer choices. Specifications will also indicate how SR answer choices will be annotated to indicate their purpose or focus. Depth of Knowledge classifications will be provided that demonstrate integration across content standards.

Performance Level Descriptors – Items for the same content standards may be written at different levels of proficiency. Specifications will indicate how performance level descriptors will be determined for items.

Depth of Knowledge – Items for a given assessment target may require different Depths of Knowledge. Specifications will indicate the Depth of Knowledge required for SR and CR items relevant to each content standard . Depth of Knowledge classifications drawing on Norman Webb's Depth of Knowledge categories are provided in the Content Specifications documents. Specifications will indicate the Depth of Knowledge required in the SR and CR items.

Item Templates – The SBAC proposal has identified a specific strategy to ensure that the items used in the assessment system are developed in a systematic way. SBAC requires the use of item templates to support item development. The proposal states,

Based on prior research and learning theory (Baker, 2007), we plan to develop reusable task design templates for generating a variety of [selected response] and constructed response items and performance tasks. These templates will be designed to measure specific types of understanding (e.g., conceptual, procedural, or strategic knowledge) or skills (e.g., problem solving, reasoning, or argumentation). This type of reusable task design template or shell invokes a consistent set of principles, criteria, and expectations for defining appropriate content limits and generating tasks and scoring criteria to address particular cognitive demands that can be adapted for use across subject matter domains and grade levels” (p. 75).

The item specifications for SR and CR items will clearly define item templates that will guide item writing related to each content standard. For content standards where more than one template is appropriate, Vendor(s) should plan to develop multiple templates. Templates will include introductions, stimulus materials, how students will interact with stimulus materials (e.g., read, scan, trace), how students are expected to apply their knowledge/skills to respond to the item, how students will respond, and Depth of Knowledge.

Example Items – Item specifications will include at least one example for each item template. Example items will demonstrate all general and specific item specifications as described in the specifications documents referenced in Appendix A.

Summary

Item specifications for SR and CR items should give item writers sufficient information to write parallel items for the same content standard. Contractors are expected to develop specifications for each content standard (as defined by the SBAC mathematics and English language arts Content Specifications presented in Appendices B and C) as well as specifications for items that require integration across content standards.

Figure 2-4: Details to be Included in SR and CR Item Specifications

Grade Level

Content Standard/Content Standards for Integrated Items

Allowable item types

Allowable stimulus materials

Boundaries of stimulus materials (if specific to content standard)

How examinees will use stimulus material in responses

Allowable disciplinary vocabulary for the standard

Allowable manipulatives/tools

Formulas

List of item demands (i.e., Items may ask students to...); include all possible demands of the standard (e.g., identify, explain, compare, contrast; rotate, dilate, translate, reflect)

Allowable answer choices for SR items

Focuses (purposes) of distractors for SR items (e.g., common errors, misconceptions, literal comprehension rather than interpretation, tangentially related to text)

Constructed responses for CR items

Limitations to items based on standard, grade level, etc.

Performance Level Descriptors (PLD)

Allowable range of Depth of Knowledge (DOK)

Item template/task shells

Sample items (as many as are necessary depending on the complexity of the standard [number of standards combined], Depth of Knowledge, performance levels) with:

- annotated answer choices for SR, including distractor rationales
- sample responses and item specific scoring rules for CR

Other specification recommendations by the Contractor(s).

Section 2.5 – Specifications for Technology-Enhanced Items

This section presents expectations for specifications for technology-enhanced items that go beyond the general considerations described in Section 2.3. Technology-enhanced (TE) items should allow for the measurement of understanding and skills that are difficult to efficiently assess or score in traditional paper-pencil formats (e.g., visual manipulations, mathematical predictions, probability experiments). Some TE items will present information to the student in formats that are difficult to present in paper-pencil formats (e.g., websites, animations, simulations, video or audio stimulus, moveable models). Some TE items will elicit responses from students in technologically assisted formats (e.g., placing one or more points on a graphic, dragging and dropping a number or graphic from one location to another, manipulating a graph, doing a geometric transformation, moving ideas from a web to an

outline). Contractor(s) will be encouraged to draw upon current and emerging integrated technologies to consider ways in which technology might improve the validity of measurement of knowledge and skills in mathematics and English language arts.

2.5.1 General Specifications for all Technology-Enhanced Items

In addition to the general specifications that apply to items and tasks (see Section 2.3), item specifications for TE items will describe general characteristics that apply to all TE items. General specifications for TE items will include the following:

General rules for technology-enhanced item stems – will provide general specifications for all TE items such as the maximum length of stems, the maximum number of sentences, complexity levels (by grade level, as defined in the Content Specifications), the allowable degree of complexity (e.g., number of steps to complete task); the range of possible points, allowable length of expected responses; grammatical structure of directions (e.g., TE items may ask questions or give directions; use simple subject-verb-object sentences; avoid dependent clauses).

Types of responses to TE items expected from students – Specifications will detail the range of possible ways in which technology will allow students to respond to items for content standard. It is important that vendors consider, for each of the content standards, ways in which technology can be used to capture students' thinking, constructions, visual reasoning, visual manipulations, etc.

Rules for scoring TE items – Specifications will provide details for how item specific scoring rules will be written. A central aspect of the validity argument is the validity of item scores. Care must be taken to ensure that scores mean what they are intended to mean. For example, key strokes can be easily captured; however, key strokes may not be a measure of the targeted concept or skill. When there are ranges of acceptable responses, scoring rules should be able to credit responses within a range. For example, if students were asked to draw a geometric figure or an angle with a certain measure without tools, scoring rules for TE items should be able to give credit to responses that are within given parameters.

Limits of items – Specifications will indicate any limits to what items can ask of students (e.g., items will not ask for definitions of mathematical terms; there will be no more than four stages in a response to a complex item).

Expected length of time to complete items – Specifications will set an upper limit on the amount of time expected for students to complete TE items including processing stimulus materials by grade level.

Allowable topics/contexts for stand-alone items – Specifications will set boundaries on the types of contexts or topics that can be used for stand-alone items (e.g., items will avoid contexts that involve competition, fast food, candy).

Allowable number of items per stimulus type – Specifications will indicate how many items can be associated with a single stimulus by grade level (e.g., There will be no more than seven reading items for a single passage.).

Allowable number of stimuli per item – Specifications will indicate how many stimuli and what types of stimuli students can process to respond to a single item (e.g., Reading items may ask students to integrate ideas/data from no more than two passages.).

Allowable range of standards assessed per stimulus type – Specifications will indicate the range of standards that can be assessed in relation to a stimulus at a single time (e.g., Each item related to a scenario will assess a different content standard. Each item related to a single graph will measure a different statistics standard.).

Technology Requirements – TE item specifications will describe all technology requirements specific to the types of items that will be developed for each subject area (mathematics and English language arts). Technology requirements will include mathematical and literacy tools and resources, mouse capabilities, drop down menus, webs, diagrams, gridded formats, graphing calculator, pseudo-websites, drag and drop capabilities, etc. Vendor(s) are encouraged to use their experiences with TE item development and the experience in the assessment and measurement field to suggest capabilities that are beyond what is shown in the examples in this document.

Other characteristics as recommended by the Contractor(s) – Contractor(s) are expected to propose additional general specifications for TE items based on their expertise, the state of the field, and factors that will enhance the work in the field.

2.5.2 Features of Detailed Specifications for TE Items Content Standards

The following paragraphs describe the characteristics that should be included in item specifications for specific content standards for TE items.

Allowable stimulus materials – Item specifications will indicate which specific technology-enhanced stimulus materials are allowable for the given content standard.

Boundaries of stimulus materials – If there are any boundaries on stimulus materials for the specific content standard, item specifications will describe those boundaries.

How examinees will interact with stimulus material – Specifications will indicate how students are to use stimulus materials in their responses (e.g., students will click on hot link to access definitions of terms; students will click on relevant mathematics tools to complete the assigned task; students will click on and drag numbers to a number line).

Vocabulary and Language– Item specifications will identify subject-area specific vocabulary and language that may be used within the items for content standard(s). Items will not measure definitions of vocabulary words. Note, general specifications for all items should address any vocabulary limits that are not specific to the content standard(s).

Allowable manipulatives/tools – Specifications will indicate which electronic manipulatives/tools are allowable for the given content standard.

Formulas – Item specifications for given content standard(s) will indicate the formulas that are expected to be used in items, whether formulas will be provided to students, and how formulas will be presented to students (e.g., students will click on icon to access the quadratic equation; students will click on icon to access the formula page).

TE Responses – TE items allow students to supply their own responses within boundaries set by the relevant technology. Specifications will indicate how students will respond and the range of acceptable responses from simple (e.g., one word/number responses) to complex responses (e.g., complete a graph, locate and extract information relevant to an essay from a pseudo-webpage). Where possible, a range of reasonable TE responses for the same content standard should be made possible through specifications (e.g., table, Venn diagram). Specifications will indicate how responses ensure demonstration of the relevant content standards.

Limitations to items – Specifications will indicate any limits to items based on grade level of students, technology, or other considerations that influence valid assessment of the content standard(s).

Integrated Items – Integrated items measure more than one content standard. Contractor(s) will identify specific combinations of content standards that are to be integrated. Specifications for integrated items will include all of the characteristics included in specifications for items measuring a single content standard.

For integrated items, specifications will give details about acceptable structures for stems or prompts that ask for integration of knowledge or skills. Specifications for integrated TE items will indicate how prompts will be written to ensure that all relevant content standards are represented in students' responses. Specifications for integrated items will indicate how interactions with technology will ensure application of the targeted content standards in the integrated items. Specifications will also indicate how technological responses will be structured to require integration of content standards.

Performance Level Descriptors – Items for the same content standards may be written at the different levels of proficiency. Specifications will indicate how performance level descriptors will be determined for items.

Depth of Knowledge – Items for a given content standard may require different Depths of Knowledge. Specifications will indicate the Depth of Knowledge required for items relevant to each content standard specific to TE items. Specifications will indicate the Depth of Knowledge required in the TE items.

Item Templates – Item templates are repeatable structures for items. The item specifications for TE items will clearly define item templates that will guide item writing related to each content standard. For content standards where more than one template is appropriate, Contractor(s) will develop multiple templates. Templates will include introductions, stimulus materials, how students will interact with stimulus materials (e.g., click on icon, drag figure), how students are expected to apply their knowledge/skills to respond to the item, how students will respond, and Depth of Knowledge.

Example Items – Item specifications will include at least one example TE item for each item template. Sample responses and an item-specific scoring rule will be provided for each example TE item.

Summary

Item specifications for technology-enhanced items should give item writers sufficient information to write parallel items for the same content standard but not overly constrain the possibilities of TE items. Contractor(s) are expected to develop specifications for each content standard (as defined by the SBAC mathematics and English language arts Content Specifications documents presented in Appendices B and C) as well as specifications for items that require integration across content standards.

Figure 2-5: Details to be Included in TE Item Specifications

<p>Grade Level</p> <p>Content Standard/Content Standards for Integrated Items</p> <p>Allowable stimulus materials</p> <p>Boundaries of stimulus materials (if specific to content standard)</p> <p>How examinees will use stimulus material in responses</p> <p>Allowable disciplinary vocabulary for the standard</p> <p>Allowable manipulatives/tools</p> <p>Formulas</p> <p>List of item demands (i.e., Items may ask students to...); include all possible demands of the standard (e.g., identify, explain, compare, contrast; rotate, dilate, translate, reflect)</p> <p>TE Responses</p> <p>Limitations to items based on standard, grade level, etc.</p> <p>Performance Level Descriptors (PLD)</p> <p>Allowable range of Depth of Knowledge (DOK)</p> <p>Item template/task shells</p> <p>Sample items (as many as are necessary depending on the complexity of the standard [number of standards combined], Depth of Knowledge, performance levels) with:</p> <ul style="list-style-type: none">• annotated answer choices for SR, including distractor rationales• sample response and item specific scoring rule for CR <p>Other specification recommendations by the Contractor(s).</p>

Section 2.6: Specifications for Performance Tasks

This section presents expectations for specifications for performance tasks that go beyond the general considerations described in Section 2.3. This section describes expectations for the general specifications that apply to all performance tasks and expectations for specifications for specific performances. As with other components of the specifications and guidelines, Vendors are encouraged to propose additional characteristics of specifications for performance tasks that will enhance the validity of performance task scores.

Performance tasks require students to demonstrate their knowledge and skills related to multiple content standards. The performance itself is the learning target. Specifications detail how the expectations for the performance will be presented to students (e.g., background information, directions, criteria), what processes students will use to complete the performance, and what the final performance will look like. Specifications also indicate the degree to which teachers and peers will be involved in the processes as the student completes the performance.

2.6.1 General Specifications for all Performance Tasks

In addition to the general specifications that apply to all items and tasks (see Section 2.3), performance task specifications will describe general characteristics that apply to all performance tasks. General specifications for all performance tasks will include the following:

Overall structure of tasks – If appropriate, specifications will introduce the overall structure of all performance tasks (e.g., setting context, collecting information, planning, execution, final performance).

Rules for performance tasks – Specifications will provide, by grade level, rules for writing all performance tasks including how tasks will be introduced to students; the maximum length, and format of directions to students; allowable degree of complexity; structure of directions for different phases of a task; how directions will be written to ensure that relevant content standards will be demonstrated; how directions will be written to ensure that students know all expectations for the performance; how teacher directions will be written to ensure that students are adequately prepared for the task, etc.

Organization of complex item directions – Specifications will indicate how complex directions will be communicated to students and teachers (e.g., use bullets to draw attention to specific requirements of a response, use charts or tables to indicate the distinct phases of the performance, provide separate student and teacher versions of the directions, use the technology to deliver distinct steps of the task on separate screens).

Formats and Syntax – Specifications will indicate how directions to students will be formatted and any syntax rules to be used (e.g., no more than three subject-verb-object sentences to set the context for the task; directions are statements rather than questions; all task requirements presented on a single page).

Boundaries on the types of responses expected from performance tasks – Specifications will place grade level appropriate boundaries on students' performances (e.g., expected length of written responses; ways that graphic and written responses can be combined; expected number of resources to be consulted; labels, titles, and captions expected for graphics).

Limits of performances – General specifications will present any limits that apply to all performance tasks within a grade level (e.g., performances must be completed within one or two class periods, performances may not require more than two significant phases to complete; no more than ten steps to complete final performance).

Types of responses expected – Specifications will indicate the range of possible performances for English language arts and mathematics at each grade level (e.g., typed written work, 3-dimensional models, computer programs, graphic designs, PowerPoint presentation).

Vocabulary – Performance task specifications will also indicate how specialized contextual vocabulary will be handled during presentation of the task.

Student work to be evaluated. Specifications will identify student actions and/or work samples to be required and/or evaluated.

Dimensions to be scored – Specifications will indicate the different scoring dimensions for each content area at each grade level (e.g., conceptual understanding, effective use of processes, critical thinking skills, analysis and interpretation, accurate use of conventions/procedures).

Other characteristics as recommended by the Contractor(s) – Contractors are expected to propose additional categories for general specifications for all performance tasks based on their expertise.

2.6.2 Features of Detailed Task Specifications

The following paragraphs describe the characteristics that should be included in task specifications for any category of performance tasks (e.g., persuasive argument, survey research).

Performance Descriptions – Performance task specifications will begin with a description of the performance. The description will include all phases of performance – from how the context will be set for students to a description of the final product(s). Note that it may be that the final product for a given performance differs from student to student.

Task Templates – The specifications for performance tasks will clearly define templates that will guide task writing related to each performance task. Task templates should include all of the criteria described below.

Content Standards - Contractor(s) will identify the content standards that are clearly demonstrated and scored through the performances as well as content standards that may be used by students during the execution of the performances but for which there will be insufficient evidence for scores.

Time length – Specifications will indicate the expected time for students to complete each task including times for segments of the task, processing stimulus materials, gathering information, collaboration with others, gaining familiarity with background information/unfamiliar vocabulary, developing final performance. It is possible that some tasks will take much longer than others; therefore, these detailed specifications may simply layout the ranges of days/times.

Allowable stimulus materials, tools, and manipulatives – Task specifications will list all tools, manipulatives, and stimulus materials that may be used in completing the performance. Specifications will also identify any materials, tools, or manipulatives that should not be allowed based on the content standards assessed in the performance.

Number of stimuli for the performance task – Task specifications will indicate the maximum number of stimuli for the performance task by grade level (e.g., Grade 10 students may be asked to use up to five sources related to the controversial issue. Each source must represent a different point of view on the controversy.).

Allowable combinations of stimuli per performance task – Task specifications will indicate the appropriate combination of stimuli for the performance (e.g., Students may conduct research using video, Internet, and print materials).

How examinees will use stimulus material – Task specifications will indicate how students are expected to use stimulus materials in the performance (e.g., cite specific evidence from at least two sources; write an annotated bibliography to support the persuasive essay including at least three references; use the manipulatives to create a three-dimensional model).

Scoring rubrics – Specifications will present the elements of the scoring rubrics relevant to the task template by content area.

Special limitations to performance tasks – If appropriate, task specifications will describe any limitations to performance tasks based on the the grade level of students, the purpose of the performance, etc.

Depth of Knowledge – As with test items, performance tasks may require different Depths of Knowledge. The expectation is that Depth of Knowledge for performance tasks will be at levels of interpretation, application analysis, and evaluation in relation to the content standards. Specifications will indicate the Depth of Knowledge required in the performance tasks.

Summary

Specifications for performance tasks should give task developers sufficient information to write directions for parallel tasks measuring the same content standard. Figure 2-6 presents an outline of the features to be included in specifications for a single performance task. Vendor(s) should propose developing specifications for each major category of performance task within each content area at each grade level.

Figure 2-6: Details to be Included in Performance Task Specifications

Grade Level
Description of the performance task (including preparation, process, and final product)
Task template
Content Standards demonstrated and scored
Content Standards applied but not scored
Time length
Relevant scoring rubrics
Allowable stimulus materials
Allowable manipulatives/tools
Number of stimuli per performance task
Allowable combinations of stimuli per performance task

How examinees will use stimulus material in responses

Special limitations to performance tasks based on grade level, performance, etc.

Allowable range of Depth of Knowledge (DOK)

Other details suggested by Contractor(s) based on experience, state of the field, and proposed innovations

Section 2.7: Formatting and Style Guide

Specifications will provide details about how items, directions, and stimulus materials will be formatted. Formatting issues range from layout on the screen or page to formatting of fractions. The Style Guide should account for formatting for computer delivered items. Additionally, the Style Guide should set specifications for paper-based delivery of those same items.

Contractor will develop a comprehensive Style Guide that will be used to guide formatting for all SBAC assessments. The Style Guide should detail formatting guidelines for stimulus materials, test items, test booklets, and directions and materials for performance tasks. The Style Guide should take into account formatting for items developed for computer delivery which may be administered with paper-based assessment materials. Figure 2-7 presents a list of formatting considerations expected in the Style Guide. Contractor(s) are encouraged to propose additional elements for the Style Guide.

Figure 2-7: Example Considerations for Formatting

- **Organization of complex item directions** (e.g., use bullets to draw attention to specific requirements of a response)
- **Layout of items/tasks by grade level** (e.g., introduction, followed by stimulus, followed by item stem, followed by answer choices or room for response; answer choices for SR items will be stacked; for CR items n double spaced lines will be provided for written responses, a box will be provided for single word/number responses, a grid will be provided for graphing items, gridded response items will give space for 16 characters)
- **Notational considerations** (formats for symbols, variables, abbreviations, etc.)
- **How key words and ideas will be emphasized** (e.g., bold-facing for key words such as 'greater than,' 'less than,' 'more than,' 'not,')
- **Specifications for how certain words and phrases will be applied** (e.g., the Moon instead of the moon).
- **Number representations fonts, formats** (e.g., fractions are stacked with 8 point font for numerals within a fraction, in Ariel font), how to represent the negative sign for negative numbers etc.
- **Fonts** for introductions, passages and other text, items, tables, directions, captions, etc.
- **Passage formatting** (e.g., first line indentations or extra space between paragraphs, footnotes, endnotes, superscript, bold or underline vocabulary words)
- **Font sizes for** introductions, items, stimulus materials, directions, captions, performance task direction, etc. by grade level
- **Headers, footers, and pagination** for print-based materials
- **Other style expectations to ensure consistent presentation of items and tasks**

Section 2.8: Bias and Sensitivity Guidelines

Issues of potential bias are addressed in three ways:

- Item/task specifications will detail the specific content, topics, contexts, vocabulary, and linguistic structures to avoid because of their potential for negative impact on students' performances,
- Bias and sensitivity panelists will bring knowledge of their demographic group's experiences, values and beliefs to the table as stimulus materials and items are reviewed before pilot and field testing, and
- Statistical analyses will be used to identify items that function differently for students from different groups.

Vendors will propose a strategy for collecting and aggregating the Bias and Sensitivity Guidelines for all SBAC participating states to generate a common set of Bias and Sensitivity Guidelines for all assessments in the SBAC assessment system.

The Contractor will develop SBAC Bias and Sensitivity Guidelines that will be used by writers and editors during the development of stimuli, items/tasks, and passages. Guidelines will detail issues that must be addressed as item/task writers generate items and during editorial reviews. Appendix D presents an example of the types of bias and sensitivity issues that should be detailed in the specifications. Vendors should consider these as minimums rather than maximums.

Section 2.9: Accessibility and Accommodations Guidelines

Contractor(s) will develop and publish Accessibility and Accommodation Guidelines through this RFP. SBAC is committed to ensuring fair assessment of all students. The SBAC RTTT proposal states,

SBAC's approach for item and performance task development, accommodations, accommodation policies, and accommodations use will be consistent with the principles of universal design for assessment and inclusive assessment practices, as defined by the National Center on Educational Outcomes (NCEO), and findings from recent research on accommodating students with disabilities (SWDs) (e.g., Russell, Goldberg, & O'Connor, 2003; Thompson, Thurlow, & Malouf, 2004) and English learners (ELs) (e.g., Kopriva, Emick, Hipolito-Delgado, & Cameron, 2007; Rivera, Acosta, & Willner, 2008). SBAC is committed to developing common understandings, guidelines, and/or policies and practices that will lead to more accurate reporting for ELs, SWDs, and Section 504 students and will ensure that students are served across States in an equitable manner. (RTTT application, p. 79)

In addition, research suggests that linguistic simplification is critical to ensure that English learners (ELs) can show what they know and can do (Abedi & Lord, 2001; Abedi, Lord, & Plummer, 1997; Abedi, Lord, & Hofstetter, 1998; Abedi, Lord, Hofstetter, & Baker, 2000; Sato, Rabinowitz, Gallagher, Huang, 2010).

Accessibility refers to the array of technologies, supports, and features of test design that make it possible for students with special assessment needs and EL needs to participate in assessment in a manner that is both meaningful and equitable. The aim of these accessibility options and procedures is to minimize or eliminate barriers to participation and accurate measurement that may occur when specific student characteristics – language proficiency, cognitive and perceptual abilities, proficiency in non-criterion academic skills (e.g. the ability to read [nonmathematical text in] math items), background and life experiences – interact negatively with the basic participation requirements of the assessment or the contextual make-up of individual test items, making it difficult to produce a fair estimate of the student's knowledge and skills. The accommodations that are ubiquitous in contemporary educational measurement are a part of accessibility, but SBAC intends to expand this model to the notion of *Access by Design* originally articulated by Fedorchak and her colleagues in their 2009 Enhanced Assessment Grant and described in SBAC's RTTT application. This model emphasizes reduction of the need for externally provided accommodations through the use of Universal Design principles and a host of computerized accessibility features that can be built into a student assessment interface, providing access to students in keeping with current technology, but which also maintains the expectation of effective instruction and fundamental academic learning.

Over the past decade much research has been conducted and significant progress has been made toward the goal of including the vast majority of students in assessment, including students with special assessment needs and English learner needs. However, current generation accessibility options share a common set of problems. First and foremost, it has been common practice to address accessibility through post hoc processes and augmentations; participation issues have been addressed after most of the assessment development work has been completed, often with less than satisfactory results and in some cases leaving some student groups with no acceptable options for demonstrating their skills and abilities. It has also been common practice to address the majority of accessibility issues using externally provided accommodations. This strategy comes with its own set of complications; it is resource intensive, prone to problems with implementation fidelity, and in some cases, may violate students' rights to privacy. An additional problem with the current accommodations model is that it tends to be applied broadly across an entire test or test session, even though the student may only have accessibility issues with specific items. This may actually introduce barriers rather than overcome them.

In order to move assessment accessibility into the next generation, the SBAC Accessibility and Accommodations Workgroup has identified the following key principles to guide their work,:

- Ensure that all accessibility options and procedures are designed and implemented in a manner that preserves the constructs targeted for measurement in each assessment item.
- Address accessibility through a student centered approach that allows matching of accessibility options to an individual student needs profile on an item by item basis.

- Minimize the use of externally provided accommodations except for situations when students needs cannot be met through universal design procedures and embedded accessibility tools and technologies.
- Consider accessibility at every phase of test development, from initial design through item development, field-testing and implementation. Avoid post hoc solutions that can be minimally effective and often fail to address the full range of special assessment needs.
- Build accessibility into the item authoring process using Universal Design procedures and expert review.
- Implement a tagging system that communicates the accessibility options and procedures that may or may not be used with each item (e.g., no read aloud on reading comprehension items) or how accessibility options should be applied (e.g. how tables should be read on math items).

These principles are important because they exemplify SBAC’s commitment to the development of assessments that are accessible to the broadest range of students and that maintain the critical balance between equity and measurement consistency and accuracy. They will also lead to more efficient use of resources, particularly by replacing accommodations that must be implemented or supervised by educators with embedded accessibility tools. Adherence to these principles will also enhance item portability by including accessibility guidelines and procedures in an item tagging system. Finally, these principles are consistent with a “student first” philosophy that can lead to a new generation of assessments that are inclusive, engaging, and respectful of the students’ personal needs, but also maintain a high level of reliability and validity.

There is a need to draw distinctions, as necessary and appropriate, between the access needs of ELs and SWDs. Access and accommodations are not “one size fits all” and the manner in which some access strategies and accommodations are operationalized for an EL vs. a SWD may differ (e.g., supports for language development for an EL look different from supports for language disability for an SWD).

Contractor(s) will develop the Accessibility and Accommodation Guidelines to set research-based requirements for universal design and linguistic simplicity. The Accessibility and Accommodation Guidelines will be used by item/task writers and editors as they generate and review items and tasks.

At a minimum, Accessibility and Accommodations Guidelines should include descriptions of:

1. methods and procedures for embedding accessibility in item development, including how principles of Universal Design may be applied
2. item coding protocols
3. item tagging that may be used
4. item authoring procedures and training for item writers that will incorporate accessibility at the item level
5. how potential sources of item bias will be identified and eliminated, including both statistical procedures and expert review processes

6. methods and procedures that will help ensure that accessibility tools and options are applied to each stimulus, item, and task in ways that preserve the construct that is designated for measurement;
7. how item-specific accessibility information will be recorded and communicated, specifically addressing the need for item portability
8. the interface of accessibility and accommodations, focusing on how it might be determined if accessibility needs on a particular item/task can be met through embedded accessibility tools or if accessibility options for the item are limited only to externally provided accommodations

Each of the requirements above, should address,

- relevant research and effective practices (whenever possible)
- item samples (for each item type) which illustrate the described principle

The following documents may provide bidders with additional information useful for addressing SBAC's accessibility priorities:

1. RTTA Assessment Grant Proposal, pg X11-X13, Appendix A3-2.
2. Michael Russell, *Digital Test Delivery: Empowering Accessible Test Design to Increase Test Validity for All Students* (Paper produced in partnership with the Arabella Advisors, 2010).
3. Martha L. Thurlow, Rachel F. Quenemoen and Sheryl S. Lazarus, *Meeting the Needs of Special Education Students: Recommendations for the Race to the Top Consortia and States* (Paper produced in partnership with the Arabella Advisors, 2010).

Summary

Vendors should carefully review the expectations for SBAC specifications and guidelines as they prepare proposals and bids. Vendors should also review evaluation criteria to ensure that they have addressed expectations for competitive proposals.

4. MANAGEMENT PROPOSAL

Vendors should develop a management proposal for each component of the overall project on which the Vendor intends to bid. **Any aspect of the management proposal that is common to all components should be presented once and referenced (as appropriate) in the management proposal for subsequent components.** See the table on Page 18 for project components.

A. Project Management (SCORED)

1. **Project Team Structure/Internal Controls** – Vendors should provide a description of the proposed project team structure and internal controls to be used during the course of the project, including any subcontractors. Provide an organizational chart of your firm indicating lines of authority for personnel involved in performance of this potential contract and relationships of this staff to other programs or functions of the firm. This chart must also show lines of authority to the next senior level of management. Include who within the firm will have prime responsibility and final authority for the work.
2. **Staff Qualifications/Experience** – Vendors should identify staff, including subcontractors, who will be assigned to the potential contract, indicating the responsibilities and qualifications of such personnel, and include the amount of time each will be assigned to the project. **Provide abbreviated resumes (maximum of 4 pages) for the named staff, which include key information on the individual's particular skills related to this project, education, experience, and any other pertinent information.** The Vendor must commit that staff identified in its proposal will actually perform the assigned work. Any staff substitution must have the prior approval of SBAC.

B. Experience of the Vendor (SCORED)

1. Indicate other experience, **relevant to the work defined for this RFP**, that indicates the qualifications of the Vendor, and any subcontractors, for the performance of the potential contract (See page 10 for expected and desired qualifications).
2. Describe prior experiences working collaboratively in the development of stimulus specifications, item/task specifications, style guides, bias and sensitivity guidelines, and accessibility and accommodations guidelines.
3. Include a list of contracts the Vendor has had during the last five 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 (MANDATORY)

List names, addresses, telephone numbers, and fax numbers/email addresses of three business references for which work has been accomplished and briefly describe the type of service provided. The Vendor must grant permission to OSPI to contact the references. Do not include current OSPI staff as references. References may be contacted for the top-scoring proposal(s) only.

D. Vendor Intake Form (MANDATORY)

Vendors must submit a completed Contractor Intake Form, Exhibit D. Please sign and include any attachments that are necessary.

4. COST PROPOSAL (MANDATORY)

The evaluation process is designed to award this procurement not necessarily to the Vendor of least cost, but rather to the Vendor whose proposal best meets the requirements of this RFP. However, Vendors are encouraged to submit proposals that are consistent with state government efforts to conserve state resources.

The following table presents a range for the expected costs for the work on each of the components defined by this RFP.

Component 1	Component 2	Component 3	Component 4	Component 5	Total
\$600,000	\$350,000	\$300,000	\$100,000	\$150,000	\$1,500,000

Component costs that are part of a comprehensive proposal (combination of all five components) can be above the listed individual Component amount, *if* the corresponding combined bid remains at or below the amount listed as *Total*. Stand-alone component bids, as well as comprehensive bids, will be considered non-responsive if exceeding the corresponding component amounts or *Total* listed.

Identification of Costs – Identify all costs including expenses to be charged for performing the services necessary to accomplish the objectives of the contract. The Vendor 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. Cost proposals should clearly delineate the costs associated with each component of the overall project on which the Vendor submits a bid. Cost proposals should also indicate cost efficiencies as well as organizational efficiencies (without sacrificing quality) that are possible if more than one component of the project is awarded to the same vendor. Vendors are required to collect and pay Washington State sales tax, if applicable.

Costs for subcontractors are to be broken out separately. Please note if any subcontractors are certified by the Office of Minority and Women’s Business Enterprises.

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- Abedi, J., & Lord, C. (2001). The language factor in mathematics tests. *Applied Measurement in Education, 14*(3), 219-234.
- Abedi, J., Lord, C., & Hofstetter, C. (1998). *Impact of selected background variables on students NAEP math performance* (CSE Tech. Rep. No. 478). Los Angeles: University of California, Center for the Study of Evaluation/National Center for Research on Evaluation, Standards, & Student Testing.
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- Russell, M., Goldberg, A., & O'Connor, K. (2003). Computer-based testing and validity: A look back into the future. *Assessment in Education: Principles, Policy and Practice, 10*, 279–293.

¹ Dates for retrieval of on-line documents are from the original RTTT proposal narrative.

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- Thompson, S., Thurlow, M., & Malouf, D. B. (2004). Creating better tests for everyone through universally designed assessments. *Journal of Applied Testing Technology*. Retrieved June 1, 2010, from http://www.testpublishers.org/Documents/Creating_Better_Tests%20Final%20Revision%205.15.04.pdf
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Section D. EVALUATION AND CONTRACT AWARD

1. EVALUATION PROCEDURE

Responsive proposals will be evaluated strictly in accordance with the requirements stated in this solicitation and any addenda issued. The evaluation of proposals shall be accomplished by an evaluation team, to be designated by OSPI, which will determine the ranking of the proposals.

OSPI, at its sole discretion, may elect to select the top-scoring firms as finalists for an oral presentation.

2. EVALUATION WEIGHTING AND SCORING

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

Components of the Project:

1. Specifications Traditional Assessment Elements and Project Oversight

Technical Proposal – 67%		540 points
Project Approach/Methodology	325 points (maximum)	
Quality of Work Plan	60 points (maximum)	
Project Schedule	50 points (maximum)	
Project Deliverables	50 points (maximum)	
Outcomes and Performance Measurement	40 points (maximum)	
Risks	15 points (maximum)	
Management Proposal – 33%		260 points
Project Team Structure/Internal Controls	80 points (maximum)	
Staff Qualifications/Experience	90 points (maximum)	
Experience of the Consultant	90 points (maximum)	
GRAND TOTAL FOR PROPOSAL		800 points

2. Specifications for Technology-Enhanced Items

Technical Proposal – 62%		500 points
Project Approach/Methodology	255 points (maximum)	
Quality of Work Plan	60 points (maximum)	
Project Schedule	50 points (maximum)	
Project Deliverables	80 points (maximum)	
Outcomes and Performance Measurement	40 points (maximum)	
Risks	15 points (maximum)	
Management Proposal – 38%		300 points
Project Team Structure/Internal Controls	120 points (maximum)	
Staff Qualifications/Experience	90 points (maximum)	
Experience of the Consultant	90 points (maximum)	
GRAND TOTAL FOR PROPOSAL		800 points

3. Specifications for Performance Tasks

Technical Proposal – 62%		500 points
Project Approach/Methodology	255 points (maximum)	
Quality of Work Plan	60 points (maximum)	
Project Schedule	50 points (maximum)	
Project Deliverables	80 points (maximum)	
Outcomes and Performance Measurement	40 points (maximum)	
Risks	15 points (maximum)	
Management Proposal – 38%		300 points
Project Team Structure/Internal Controls	120 points (maximum)	
Staff Qualifications/Experience	90 points (maximum)	
Experience of the Consultant	90 points (maximum)	
GRAND TOTAL FOR PROPOSAL		800 points

4. Specifications for Bias and Sensitivity Guidelines

Technical Proposal – 67%		540 points
Project Approach/Methodology	300 points (maximum)	
Quality of Work Plan	60 points (maximum)	
Project Schedule	50 points (maximum)	
Project Deliverables	50 points (maximum)	
Outcomes and Performance Measurement	40 points (maximum)	
Risks	40 points (maximum)	
Management Proposal – 33%		260 points
Project Team Structure/Internal Controls	80 points (maximum)	
Staff Qualifications/Experience	90 points (maximum)	
Experience of the Consultant	90 points (maximum)	
GRAND TOTAL FOR PROPOSAL		800 points

5. Specifications for Accessibility and Accommodations Guidelines

Technical Proposal – 67%		530 points
Project Approach/Methodology	320 points (maximum)	
Quality of Work Plan	60 points (maximum)	
Project Schedule	45 points (maximum)	
Project Deliverables	50 points (maximum)	
Outcomes and Performance Measurement	40 points (maximum)	
Risks	15 points (maximum)	
Management Proposal – 33%		270 points
Project Team Structure/Internal Controls	70 points (maximum)	
Staff Qualifications/Experience	90 points (maximum)	
Experience of the Consultant	110 points (maximum)	
GRAND TOTAL FOR PROPOSAL		800 points

3. NOTIFICATION TO PROPOSERS

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

4. DEBRIEFING OF UNSUCCESSFUL PROPOSERS

Upon request, an individual debriefing conference will be scheduled with an unsuccessful Proposer. The request for a debriefing conference must be received by the RFP Coordinator within three (3) business days after the Notification of Unsuccessful Vendor letter or e-mail is sent to the Vendor. 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 Vendor'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 30 minutes.

5. PROTEST PROCEDURE

This protest procedure is available to Vendors who submitted a response to this solicitation document and who have participated in a debriefing conference. Upon completion of the debriefing conference, the Vendor 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.

Vendors 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 Vendors 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 OSPI 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, or 2) OSPI's assessment of its own and/or other agencies needs or requirements.

Upon receipt of a protest, a protest review will be held by OSPI. OSPI Contracts Administrator or an employee delegated by the Contracts Administrator who was not involved in the procurement will consider the record and all available facts and issue a decision within five business days of receipt of the protest. If additional time is required, the protesting party will be notified of the delay.

In the event a protest may affect the interest of another Vendor that submitted a proposal, such Vendor 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 OSPI's action; or
- Find only technical or harmless errors in OSPI's acquisition process and determine OSPI to be in substantial compliance and reject the protest; or
- Find merit in the protest and provide OSPI options which may include:
 - Correct the errors and re-evaluate all proposals, and/or
 - Reissue the solicitation document and begin a new process, or
 - Make other findings and determine other courses of action as appropriate.

If OSPI determines that the protest is without merit, OSPI will enter into a contract with the apparently successful Contractor. If the protest is determined to have merit, one of the alternatives noted in the preceding paragraph will be taken.

Section E. RFP EXHIBITS

- Exhibit A Certifications and Assurances
- Exhibit B Sample Contract
- Exhibit C General Terms and Conditions (GT&Cs)
- Exhibit D Contractor Intake Form
- Exhibit E Evaluation Criteria
- Exhibit F Additional Provisions Under the American Recovery and Reinvestment Act of 2009

EXHIBIT A
CERTIFICATION AND ASSURANCES

I/we make the following certifications and assurances as a required element of the proposal to which it is attached, understanding that the truthfulness of the facts affirmed here and the continuing compliance with these requirements are conditions precedent to the award or continuation of the related contract(s):

1. I/we declare that all answers and statements made in the proposal are true and correct.
2. The prices and/or cost data have been determined independently, without consultation, communication, or agreement with others for the purpose of restricting competition. However, I/we may freely join with other persons or organizations for the purpose of presenting a single proposal.
3. The attached proposal is a firm offer for a period of 60 days following receipt, and it may be accepted by OSPI without further negotiation (except where obviously required by lack of certainty in key terms) at any time within the 60-day period.
4. In preparing this proposal, I/we have not been assisted by any current or former employee of the state of Washington whose duties relate (or did relate) to this proposal or prospective contract, and who was assisting in other than his or her official, public capacity. (Any exceptions to these assurances are described in full detail on a separate page and attached to this document.)
5. I/we understand that OSPI will not reimburse me/us for any costs incurred in the preparation of this proposal. All proposals become the property of OSPI, and I/we claim no proprietary right to the ideas, writings, items, or samples, unless so stated in this proposal.
6. Unless otherwise required by law, the prices and/or cost data which have been submitted have not been knowingly disclosed by the Proposer and will not knowingly be disclosed by him/her prior to opening, directly or indirectly to any other Proposer or to any competitor.
7. I/we agree that submission of the attached proposal constitutes acceptance of the solicitation contents and the attached sample contract and general terms and conditions. If there are any exceptions to these terms, I/we have described those exceptions in detail on a page attached to this document.
8. No attempt has been made or will be made by the Proposer to induce any other person or firm to submit or not to submit a proposal for the purpose of restricting competition.
9. I/we grant OSPI the right to contact references and others, who may have pertinent information regarding the Proposer's prior experience and ability to perform the services contemplated in this procurement.

On behalf of the firm submitting this proposal, my name below attests to the accuracy of the above statements.

Signature of Proposer

Title

Date

EXHIBIT B

CONTRACT FOR PERSONAL SERVICES

Contract No. _____

between

SUPERINTENDENT OF PUBLIC INSTRUCTION, STATE OF WASHINGTON

(hereinafter referred to as Superintendent)
Old Capitol Building, P.O. Box 47200
Olympia, WA 98504-7200

and

[CONTRACTOR NAME]

(hereinafter referred to as Contractor)

[Contractor Address]

Social Security #xxx-xx-█ or Federal Identification # █-█
and
Unified Business Identifier # █-█-█

In consideration of the promises and conditions contained herein, Superintendent and Contractor do mutually agree as follows:

I. DUTIES OF THE CONTRACTOR

A. The general objective(s) of this contract is/are as follows:

[Include a brief description of the agreed upon services.]

B. In order to accomplish the general objective(s) of this contract, Contractor shall perform the following specific duties to the satisfaction of the Superintendent's designee, [name of designee]:

[Describe the work to be performed by Contractor in detail, including a breakdown of the quantifiable steps or components of what the Contractor is to do.]

As included in the Superintendent's Request for Proposals No. [RFP#] attached as Exhibit B, and the Contractor's proposal dated [date], attached as Exhibit C, and any subsequent amendments as identified in Section [section number]: Incorporation of Attachments and Order of Precedence.

C. The Contractor shall produce the following written reports or other written documents (deliverables) by the dates indicated below:

[List deliverables]

All written reports required under this contract must be delivered to the Superintendent's designee in accordance with the schedule above.

II. CONDITIONS OF COMMENCEMENT OF PERFORMANCE AND SCHEDULE OF PERFORMANCE

Contractor shall not commence performance, or be entitled to compensation or reimbursement for any services rendered, prior to the occurrence of each of the following conditions: (1) This contract must be executed by a representative of the Contractor and the Superintendent; (2) This contract must be filed with, and approved by, the Office of Financial Management, if and to the extent required by state personal service contract laws; and, (3) Superintendent's designee must confirm the occurrence of conditions number one and two and notify the Contractor to commence performance.

The schedule of performance of Contractor's duties is as follows subject, however, to the three prior conditions to commencement of performance set forth immediately above:

The period of performance under this contract will be from [start date] or date of execution, whichever is later, through [end date].

III. DUTIES OF THE SUPERINTENDENT

- A. In consideration of Contractor's satisfactory performance of the duties set forth herein, Superintendent shall compensate Contractor at a rate not to exceed a total of [write out full dollar amount] dollars (\$). Payment for satisfactory performance shall not exceed this amount unless the parties mutually agree to a higher amount prior to the commencement of any work, which will cause the maximum payment to be increased.

In addition, Contractor shall be entitled to reimbursement in accordance with the terms set forth in Section III.C. below.

Funds for the payment of this contract are provided by federal program(s) [program title], Catalog of Federal Domestic Assistance #(s) [CFDA#].

- B. Payment shall be made to the Contractor as follows:

>Periodically in the form of progress payments in the amounts and for the stages of partial performance set forth below:

Schedule of Payments

>Periodically based on invoices submitted by the Contractor for actual costs incurred to date based on receipts or other documentation.

Invoice(s) will be paid only after approval by the Superintendent's designee and Agency Financial Services, OSPI. The invoice shall include an original signature, the contract number, and document to the Superintendent's designee's satisfaction a description of the work performed and payment requested. Within approximately thirty (30) working days of the Superintendent's designee receiving and approving the invoice, payment will be mailed or electronically transferred to the Contractor by Agency Financial Services, OSPI.

C. Contractor shall be entitled to reimbursement for expenses incurred, as follows:

1. Travel and per diem expenses for [#] person(s) in the amounts and for the purposes otherwise established for state employees at the time of incurrence by the rules and regulatory policies of the Office of Financial Management (OFM) not to exceed [write out full dollar amount] dollars (\$ []). Contractor's "official duty station" (i.e., the origin of reimbursable travel and/or per diem) shall be [official duty station].

and/or

2. Expenses incurred for the following specified purposes not to exceed a total of [write out full dollar amount] dollars (\$ []). Contractor must submit receipts or other documentation.

IV. RENEWAL (OPTIONAL CLAUSE)

Superintendent has the right to renew this contract in whole or in part for the year(s) [renewal year(s)] by giving notice on or before [date] to the Contractor. If Superintendent provides such notice to the Contractor, the Contractor shall be obligated to enter into a contract with the same fiscal obligations as the previous contract year, provided that Superintendent and Contractor shall negotiate any revision of additional services or goals beyond those encompassed in the previous contract.

V. CONTRACT MANAGEMENT

The following Contract Manager for each of the parties shall be the contact person for all communications and billings regarding the performance of this contract.

Contract Manager for OSPI	Contract Manager for [Contractor Name]
[Contract Manager's Name]	[Contract Manager's Name]
[Contract Manager's Title]	[Contract Manager's Title]
Old Capitol Building, P.O. Box 47200 Olympia, WA 98504-7200	[Contract Manager's Address]
Phone: ([]) []-[]-[]	Phone: ([]) []-[]-[]
Fax: ([]) []-[]-[]	Fax: ([]) []-[]-[]
Email: [Contract Manager's Email Address]	Email: [Contract Manager's Email Address]

VI. INCORPORATION OF ATTACHMENTS AND ORDER OF PRECEDENCE

Each of the attachments listed below is by this reference hereby incorporated into this contract. In the event of an inconsistency in this contract, the inconsistency shall be resolved by giving precedence in the following order:

- Applicable Federal and state of Washington statutes and regulations
- Special Terms and Conditions as contained in this basic contract instrument
- Attachment A – Contract for Personal Services, General Terms and Conditions
- Attachment B – Request for Proposals No. [RFP#] with any formal RFP amendments that change scope of work, etc.
- Attachment C – Contractor's Proposal
- *Any other provision, term or material incorporated herein by reference or otherwise incorporated.*

VII. APPROVAL

This contract shall be subject to the written approval of the Superintendent's authorized representative and shall not be binding until so approved. The contract may be altered, amended, or waived only by a written amendment executed by both parties.

We the undersigned agree to the terms of the foregoing contract.

[Contractor Name]

Superintendent of Public Instruction
State of Washington

Signature Title

Sheryl Turner, Contracts Administrator

Print Name Date

Date

Who certifies that he/she is the Contractor identified herein, OR a person duly qualified and authorized to bind the Contractor so identified to the foregoing Agreement.

Approved as to FORM ONLY
by the Assistant Attorney General

Non-profit organization? yes* no
*If yes, under what IRS section? Please attach a copy.

Exhibit C

Attachment A Contract for Personal Services GENERAL TERMS AND CONDITIONS

1. **Access to Data.** In compliance with Chapter 39.29 RCW, the Contractor shall provide access to data generated under this contract to the Superintendent, the Joint Legislative Audit and Review Committee, and the State Auditor at no additional cost. This includes access to all information that supports the findings, conclusions, and recommendations of the Contractor's reports, including computer models and methodology for those models.
2. **Alterations and Amendments.** This Agreement may be amended only by mutual agreement of the parties. Such amendments shall not be binding unless they are in writing and signed by personnel authorized to bind each of the parties.
3. **Americans with Disabilities Act (ADA) of 1990, Public Law 101-336, also referred to as the "ADA" 28 CFR Part 35.** The Contractor must comply with the ADA, which provides comprehensive civil rights protection to individuals with disabilities in the areas of employment, public accommodations, state and local government services, and telecommunications.
4. **Assignment.** Neither this Contract, nor any claim arising under this Contract, shall be transferred or assigned by the Contractor without prior written consent of the Superintendent.
5. **Assurances.** The Superintendent and the Contractor agree that all activity pursuant to this Contract will be in accordance with all applicable current federal, state and local laws, rules and regulations.
6. **Attorney's Fees.** In the event of litigation or other action brought to enforce contract terms, each party agrees to bear its own attorney's fees and costs.
7. **Budget Revisions.** Any monetary amount budgeted by the terms of this contract for various activities and line item objects of expenditure may be revised without prior written approval of Superintendent, so long as the revision is no more than ten percent (10%) of the original line item amount and the increase in an amount is offset by a decrease in one or more other amounts equal to or greater than the increase. All other budget revisions exceeding ten percent (10%) shall only be made with the prior written approval of the Superintendent.
8. **Certification Regarding Debarment, Suspension, and Ineligibility.** If federal funds are the basis for this contract, the Contractor certifies that neither it nor its principals are debarred, suspended, proposed for debarment, or voluntarily excluded from participation in transactions by any federal department or agency. The Contractor further certifies that they will ensure that potential subcontractors or any of their principals are not debarred, suspended, proposed for debarment, or voluntarily excluded from participation in "covered transactions" by any federal department or agency. "Covered transactions" include procurement contracts for goods that are expected to equal or exceed \$25,000. Contractor may do so by obtaining a certification statement from the potential subcontractor or subrecipient or by checking the "List of Parties Excluded from Federal Procurement and Non-Procurement Programs" provided on-line by the General Services Administration.
9. **Change in Status.** In the event of substantive change in the legal status, organizational structure, or fiscal reporting responsibility of the Contractor, Contractor agrees to notify the

Superintendent of the change. Contractor shall provide notice as soon as practicable, but no later than thirty (30) days after such a change takes effect.

10. **Confidentiality.** The Contractor acknowledges that all of the data, material and information which originates from this contract, and the student assessment data, material and information which will come into its possession in connection with performance under this contract, consists of confidential data owned by the Superintendent or confidential personally identifiable data subject to the federal Family Educational Rights and Privacy Act or other privacy laws, and that disclosure to or use by third parties would be damaging. The Contractor, therefore, agrees to hold all such material and information in strictest confidence, not to make use thereof other than for the performance of this contract, to release it only to authorized employees and agents requiring such information and not release or disclose it to any other party. The Contractor agrees to release such information or material only to employees and agents who have signed a written agreement expressly prohibiting disclosure.
11. **Copyright Provisions.** Unless otherwise provided, all Materials produced under this contract shall be considered "works for hire" as defined by the U.S. Copyright Act and shall be owned by the Superintendent. The Superintendent shall be considered the author of such Materials. If Materials are not considered "works for hire", Contractor hereby irrevocably assigns all right, title, and interest in Materials, including all intellectual property rights, to the Agency effective from the moment of creation of such Materials.

Materials means all items in any format and includes, but is not limited to, data, reports, documents, pamphlets, advertisements, books, magazines, surveys, studies, computer programs, films, tapes, and/or sound reproductions. Ownership includes the right to copyright, patent, register and the ability to transfer these rights.

For Materials that are delivered under the contract, but that incorporate pre-existing materials not produced under the contract Contractor hereby grants to the Agency a nonexclusive, royalty-free, irrevocable license (with rights to sublicense others) in such Materials to translate, reproduce, distribute, prepare derivative works, publicly perform, and publicly display. The Contractor warrants and represents that Contractor has all rights and permissions, including intellectual property rights, moral rights and rights of publicity, necessary to grant such a license to the Agency.

The Contractor shall exert all reasonable effort to advise the Agency, at the time of delivery of data furnished under this contract, of all known or potential invasions of privacy contained therein and of any portion of such document which was not produced in the performance of this contract. The Agency shall receive prompt written notice of each notice or claim of infringement received by the Contractor with respect to any data delivered under this contract. The Agency shall have the right to modify or remove any restrictive markings placed upon the data by the Contractor.

12. **Covenant Against Contingent Fees.** The Contractor warrants that no person or selling agent has been employed or retained to solicit or secure this contract upon an agreement or understanding for a commission, percentage, brokerage or contingent fee, excepting bona fide employees or bona fide established agent maintained by the Contractor for the purpose of securing business. The Agency shall have the right, in the event of breach of this clause by the Contractor, to annul this contract without liability or, in its discretion, to deduct from the contract price or consideration or recover by other means the full amount of such commission, percentage, brokerage or contingent fees.
13. **Disputes.** In the event that a dispute arises under this contract, it shall be determined by a Dispute Board in the following manner: (1) The Superintendent shall appoint a member to the Dispute Board; (2) the Contractor shall appoint a member to the Dispute Board; (3) the

Superintendent and the Contractor shall jointly appoint a member to the Dispute Board; (4) the Dispute Board shall evaluate the dispute and make a determination of the dispute; and, the determination of the Dispute Board shall be final and binding on the parties hereto.

As alternatives to the above Dispute Board process: (1) if the dispute is between two or more state agencies, any one of the agencies may request intervention by the Governor, as provided by 43.17.330 RCW, in which event the Governor's process shall control; and, (2) if the dispute is between a non-state agency and another state agency or non-state agency party to this contract, all the disputing parties may mutually agree to mediation prior to submitting the dispute to a Dispute Board in the event the dispute is not resolved pursuant to mediation within an agreed-upon time period.

14. **Duplicate Payment.** The Superintendent shall not pay the Contractor, if the Contractor has charged or will charge the state or Washington or any other party under any other contract or agreement, for the same services or expenses.
15. **Entire Agreement.** This contract contains all the terms and conditions agreed upon by the parties. No other understandings, oral or otherwise, regarding the subject matter of this Agreement shall be deemed to exist or to bind any of the parties hereto.
16. **Ethical Conduct.** Neither the Contractor nor any employee or agent of the Contractor shall participate in the performance of any duty or service in whole or part under this contract in violation of, or in a manner that violates any provision of the Ethics in Public Service law at Chapter 42.52 RCW, RCW 42.17.130 and 41.06.250 prohibiting the use of public resources for political purposes.
17. **Governing Law.** This contract shall be construed and interpreted in accordance with the laws of the State of Washington and the venue of any action brought hereunder shall be in Superior Court for Thurston County.
18. **Indemnification.** To the fullest extent permitted by law, Contractor shall indemnify, defend and hold harmless the Superintendent and all officials, agents, and employees of the Superintendent, from and against all claims for injuries or death arising out of or resulting from the performance of this contract. "Claim" as used in this contract, means any financial loss, claim, suit, action, damage, or expense, including but not limited to attorney's fees, attributable for bodily injury, sickness, disease, or death, or injury to or destruction of tangible property including loss of use resulting therefrom. Additionally, "claims" shall include but not be limited to, assertions that the use or transfer of any software, book, document, report, film, tape or sound reproduction or material of any kind, delivered hereunder, constitutes an infringement of any copyright, patent, trademark, trade name, or otherwise results in an unfair trade practice or in unlawful restraint of competition. Contractor's obligation to indemnify, defend and hold harmless includes any claim by Contractor's agents, employees, representatives, or any subcontractor or its employees.

Contractor expressly agrees to indemnify, defend, and hold harmless the Superintendent for any claim out of or incident to Contractor's or subcontractor's performance or failure to perform the contract. Contractor's obligation to indemnify, defend, or hold harmless the Superintendent shall not be eliminated or reduced by any actual or alleged concurrent negligence by Superintendent or its agents, employees, or officials.

Contractor waives its immunity under Title 51 RCW to the extent it is required to indemnify, defend and hold harmless Superintendent and its agents, employees, or officials.

19. **Independent Capacity of the Contractor.** The parties intend that an independent Contractor relationship will be created by this contract. The Contractor and his/her employees or agents performing under this contract are not employees or agents of the Superintendent. The Contractor will not hold himself/herself out as nor claim to be an officer or employee of the Superintendent or of the state of Washington by reason hereof, nor will the Contractor make any claim or right, privilege, or benefit which would accrue to such employee under law. Conduct and control of the work will be solely with the Contractor.

20. **Insurance.**

a. **Worker's Compensation Coverage.** The Contractor shall at all times comply with all applicable worker's compensation, occupational disease, and occupational health and safety laws, statutes, and regulations to the fullest extent applicable. This requirement includes the purchase of industrial insurance coverage for the Contractor's employees, as may now hereafter be required of an "employer" as defined in Title 51 RCW. Such worker's compensation and occupational disease requirements shall include coverage for all employees of the Contractor, and for all employees of any subcontract retained by the Contractor, suffering bodily injury (including death) by accident or disease, which arises out of or in connection with the performance of this contract. Satisfaction of these requirements shall include, but shall not be limited to:

- 1) Full participation in any required governmental occupational injury and/or disease insurance program, to the extent participation in such a program is mandatory in any jurisdiction;
- 2) Purchase worker's compensation and occupational disease insurance benefits to employees in full compliance with all applicable laws, statutes, and regulations, but only to the extent such coverage is not provided under mandatory governmental program in "a" above, and/or;
- 3) Maintenance of a legally permitted and governmentally approved program of self-insurance for worker's compensation and occupational disease.

Except to the extent prohibited by law, the program of the Contractor's compliance with worker's compensation and occupational disease laws, statutes, and regulations in 1), 2), and 3) above shall provide for a full waiver of rights of subrogation against the Superintendent, its directors, officers, and employees.

If the Contractor, or any subcontractor retained by the Contractor, fails to effect and maintain a program of compliance with applicable worker's compensation and occupational disease laws, statutes, and regulations and the Superintendent incurs fines or is required by law to provide benefits to such employees, to obtain coverage for such employees, the Contractor will indemnify the Superintendent for such fines, payment of benefits to Contractor or subcontractor employees or their heirs or legal representatives, and/or the cost of effecting coverage on behalf of such employees. Any amount owed the Superintendent by the Contractor pursuant to the indemnity may be deducted from any payments owed by the Superintendent to the Contractor for the performance of this contract.

b. **Proof of Insurance.** Certificates and or evidence satisfactory to the Superintendent confirming the existence, terms and conditions of all insurance required above shall be delivered to the Superintendent within five (5) days of the Contractor's receipt of Authorization to Proceed.

- c. **General Insurance Requirements.** Contractor shall, at all times during the term of the contract and at its cost and expense, buy and maintain insurance of the types and amounts listed above. Failure to buy and maintain the required insurance may result in the termination of the contract at the Superintendent's option. By requiring insurance herein, Superintendent does not represent that coverage and limits will be adequate to protect Contractor and such coverage and limits shall not limit Contractor's liability under the indemnities and reimbursements granted to the Superintendent in this contract.

Contractor shall include all subcontractors as insureds under all required insurance policies, or shall furnish proof of insurance and endorsements for each subcontractor. Subcontractor(s) must comply fully with all insurance requirements stated herein. Failure of subcontractor(s) to comply with insurance requirements does not limit Contractor's liability or responsibility.

21. **Licensing and Accreditation Standards.** The Contractor shall comply with all applicable local, state, and federal licensing, accreditation and registration requirements/standards, necessary to the performance of this contract.
22. **Limitation of Authority.** Only the Superintendent or the Superintendent's delegate by writing (delegation to be made prior to action) shall have the express, implied, or apparent authority to alter, amend, modify, or waive any clause or condition of this contract. Furthermore, any alteration, amendment, modification, or waiver of any clause or condition of this contract is not effective or binding unless made in writing and signed by the Superintendent.
23. **Non-Discrimination.** The Contractor shall comply with all the federal and state non-discrimination laws, regulations and policies, which are otherwise applicable to the Superintendent. Accordingly, no person shall, on the ground of race, creed, color, national origin, sex, marital status, sexual orientation, age, or the presence of any sensory, mental, or physical disability, be unlawfully excluded from participation in, be denied the benefits of, or be otherwise subjected to discrimination under any activity performed by the Contractor and its agents under this contract. The Contractor shall notify the Superintendent immediately of any allegations, claims, disputes, or challenges made against it under the Americans with Disabilities Act. In the event of the Contractor's noncompliance or refusal to comply with this nondiscrimination provision, this contract may be rescinded, cancelled or terminated in whole or part, and the Contractor may be declared ineligible for further contracts with the Superintendent.
24. **Overpayments.** Contractor shall refund to Superintendent the full amount of any overpayment under this contract within thirty (30) calendar days of written notice. If Contractor fails to make a prompt refund, Superintendent may charge Contractor one percent (1%) per month on the amount due until paid in full.
25. **Payments.** No payments in advance or in anticipation of services or supplies to be provided under this contract shall be made by the Superintendent. All payments to the Contractor are conditioned upon (1) Contractor's submission of a properly executed and supported voucher for payment, including such supporting documentation of performance and supporting documentation of costs incurred or paid, or both as is otherwise provided for in the body of this contract under Duties of the Superintendent, and (2) Acceptance and certification by the Superintendent or designee of satisfactory performance by the Contractor.

Except as otherwise provided in this contract, (1) All approvable vouchers for payment due to the Contractor shall be paid within thirty (30) calendar days of their submission by the

Contractor, and (2) All expenses necessary to the Contractor's performance of this contract not specifically mentioned in the contract shall be borne in full by the Contractor.

26. **Public Disclosure.** Contractor acknowledges that the Agency is subject to Chapter 42.17 RCW, the Public Disclosure Act and that this contract shall be a public record as defined in RCW 42.17.250 through 42.17.340. Any specific information that is claimed by the Contractor to be confidential or proprietary must be clearly identified as such by the Contractor. To the extent consistent with chapter 42-17 RCW, the Agency shall maintain the confidentiality of all such information marked confidential or proprietary. If a request is made to view the Contractor's information, the Agency will notify the Contractor of the request and the date that such records will be released to the requester unless Contractor obtains a court order enjoining that disclosure. If the Contractor fails to obtain the court order enjoining disclosure, the Agency will release the requested information on the date specified.
27. **Publicity.** The Contractor agrees to submit to the Agency all advertising and publicity matters relating to this Contract which in the Agency's judgment, Agency's name can be implied or is specifically mentioned. The Contractor agrees not to publish or use such advertising and publicity matters without the prior written consent of the Agency.
28. **Records Maintenance.** The Contractor shall maintain all books, records, documents, data and other evidence relating to this contract and performance of the services described herein, including but not limited to accounting procedures and practices which sufficiently and properly reflect all direct and indirect costs of any nature expended in the performance of this Contract. Contractor shall retain such records for a period of six years following the date of final payment. At no additional cost, these records, including materials generated under the contract, shall be subject at all reasonable times to inspection, review or audit by the Agency, personnel duly authorized by the Agency, the Office of the State Auditor, and federal and state officials so authorized by law, regulation or agreement.

If any litigation, claim or audit is started before the expiration of the six (6) year period, the records shall be retained until all litigation, claims, or audit findings involving the records have been resolved.
29. **Registration with Department of Revenue.** The Contractor shall complete registration with the Department of Revenue and be responsible for payment of all taxes due on payments made under this contract.
30. **Right of Inspection.** The Contractor shall provide right of access to its facilities to the Superintendent or any of its officers at all reasonable times, in order to monitor and evaluate performance, compliance, and/or quality assurance under this contract on behalf of the Superintendent. All inspections and evaluations shall be performed in such a manner that will not unduly interfere with the Contractor's business or work hereunder.
31. **Severability.** The provisions of this contract are intended to be severable. If any term or provision is illegal or invalid for any reason whatsoever, such illegality or invalidity shall not affect the validity of the remainder of the contract.
32. **Site Security.** While on Agency premises, Contractor, its agents, employees, or subcontractors shall conform in all respects with physical, fire or other security policies or regulations.
33. **Subcontracting.** Neither the Contractor nor any subcontractor shall enter into subcontracts for any of the work contemplated under this contract without obtaining prior written approval of

the Superintendent. In no event shall the existence of the subcontract operate to release or reduce liability of the Contractor to the Superintendent for any breach in the performance of the Contractor's duties. This clause does not include contracts of employment between the Contractor and personnel assigned to work under this contract.

34. **Taxes.** All payments accrued on account of payroll taxes, unemployment contributions, any other taxes, insurance or other expenses for the Contractor or its staff shall be the sole responsibility of the Contractor.
35. **Termination for Convenience.** Except as otherwise provided in this contract, the Superintendent or Superintendent's Designee may, by ten (10) days written notice, beginning on the second day after the mailing, terminate this contract in whole or in part. The notice shall specify the date of termination and shall be conclusively deemed to have been delivered to and received by the Contractor as of midnight the second day of mailing in the absence of proof of actual delivery to and receipt by the Contractor. If this contract is so terminated, the Superintendent shall be liable only for payment required under the terms of the contract for services rendered or goods delivered prior to the effective date of termination.
36. **Termination for Default.** In the event the Superintendent determines the Contractor has failed to comply with the conditions of this Contract in a timely manner, the Superintendent has the right to suspend or terminate this Contract. The Superintendent shall notify the Contractor in writing of the need to take corrective action. If corrective action is not taken within 30 days, the Contract may be terminated. The Superintendent reserves the right to suspend all or part of the Contract, withhold further payments, or prohibit the Contractor from incurring additional obligations of funds during investigation of the alleged compliance breach and pending corrective action by the Contractor or a decision by the Superintendent to terminate the Contract. In the event of termination, the Contractor shall be liable for damages as authorized by law including, but not limited to, any cost difference between the original contract and the replacement or cover contract and all administrative costs directly related to the replacement contract, e.g., cost of the competitive bidding, mailing, advertising and staff time. The termination shall be deemed to be a "Termination for Convenience" if it is determined that the Contractor: (1) was not in default; or (2) failure to perform was outside of his or her control, fault or negligence. The rights and remedies of the Superintendent provided in this Contract are not exclusive and are in addition to any other rights and remedies provided by law.
37. **Termination Due to Funding Limitations.** In the event funding from state, federal, or other sources is withdrawn, reduced, or limited in any way after the effective date of this contract and prior to normal completion, the Superintendent may, without advance notice and without liability for damages, terminate the contract under the "Termination for Convenience" clause. The Superintendent and Contractor may, however, renegotiate this contract under any such new funding limitations and conditions.
38. **Termination Procedure.** Upon termination of this contract the Superintendent, in addition to other rights provided in this contract, may require the Contractor to deliver to the Superintendent any property specifically produced or acquired for the performance of such part of this Agreement as has been terminated. The provisions of the "Treatment of Assets" clause shall apply in such property transfer.

The Superintendent shall pay to the Contractor the agreed upon price, if separately stated, for completed work and services accepted by the Superintendent and the amount agreed upon by the Contractor and the Superintendent for (a) completed work and services for which no separate price is stated, (b) partially completed work and services, (c) other property or services which are accepted by the Superintendent, and (d) the protection and preservation of

the property, unless the termination is for default, in which case the Superintendent shall determine the extent of the liability. Failure to agree with such determination shall be a dispute within the meaning of the "Disputes" clause for this contract. The Superintendent may withhold from any amounts due to the Contractor such sum as the Superintendent determines to be necessary to protect the Superintendent against potential loss or liability.

The rights and remedies of the Superintendent provided in this section shall not be exclusive and are in addition to any other rights and remedies provided by law under this contract.

After receipt of a notice of termination, and except as otherwise directed by the Superintendent, the Contractor shall:

- a. Stop work under this contract on the date and to the extent specified, in the notice;
- b. Place no further orders or subcontractors for materials, services or facilities except as may be necessary for completion of such portion of the work under the contract that is not terminated;
- c. Assign to the Superintendent, in the manner, at the times, and to the extent directed by the Superintendent, all rights, title, and interest of the Contractor under the orders and subcontracts in which case the Superintendent has the right, at its discretion, to settle or pay any or all claims arising out of the termination of such orders and subcontracts;
- d. Settle all outstanding liabilities and all claims arising out of such termination of orders and subcontracts, with the approval or ratification of the Superintendent to the extent the Superintendent may require, which approval or ratification shall be final for all the purposes of this clause;
- e. Transfer title to the Superintendent and deliver, in the manner, at the times and to the extent as directed by the Superintendent, any property which, if the contract had been completed, would have been required to be furnished to the Superintendent;
- f. Complete performance of such part of the work not terminated by the Superintendent; and
- g. Take such action as may be necessary, or as the Superintendent may direct, for the protection and preservation of the property related to this Agreement which, in is in the possession of the Contractor and in which the Superintendent has or may acquire an interest.

39. Treatment of Assets. Except as otherwise provided for in the contract, the ownership and title to all real property and all personal property purchased by the Contractor in the course of performing this contract with moneys paid by the Superintendent shall vest in the Superintendent, except for supplies consumed in performing this contract. The Contractor shall (1) maintain a current inventory of all the real and personal property; (2) label all the property "State of Washington, Superintendent of Public Instruction"; and, (3) surrender property and title to the Superintendent without charge prior to settlement upon completion, termination or cancellation of this Agreement.

Any property of the Superintendent furnished to the Contractor shall, unless otherwise provided herein, or approved by the Superintendent, be used only for the performance of the contract.

The Contractor shall be responsible for any loss or damage to property of the Superintendent which results from the negligence of the Contractor which results from the failure on the part of the Contractor to maintain and administer that property in accordance with sound management practices.

If any property is lost, destroyed, or damaged, the Contractor shall notify the Superintendent and take all reasonable steps to protect the property from further damage.

All reference to the Contractor under this clause shall include Contractor's employees, agents and subcontractors.



EXHIBIT D CONTRACTOR/GOVERNMENTAL ENTITY INTAKE FORM

All potential Office of Superintendent of Public Instruction Contractors or Governmental Entities must sign and submit this form before an OSPI contract or Agreement is offered.

1. CONTRACTOR NAME (AS LEGALLY REGISTERED WITH THE IRS):		CONTRACTOR DBA (DOING BUSINESS AS) NAME:	
2. CONTRACTOR ADDRESS & CONTACT INFORMATION:			
ADDRESS (NUMBER, STREET, AND APT OR SUITE)	CITY	STATE	ZIP CODE
BUSINESS PHONE NUMBER	BUSINESS FAX NUMBER		
CONTRACT MANAGER NAME	CONTRACT MANAGER EMAIL ADDRESS		
CONTRACT MANAGER PHONE NUMBER	CONTRACT MANAGER FAX		
3. CONTRACTOR LICENSE (Not applicable to ESDs, School Districts, and State Agencies):			
Do you have a current Washington State business license? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, please attach.			
Have you had any contract to provide services terminated for default? <input type="checkbox"/> Yes <input type="checkbox"/> No	If you do not have a Washington State business license, explain why you are exempt from registering your business with the State of Washington.		
If yes, please attach a list of each terminated contract with an explanation of the situation involved.	To file for a Master Business Application, visit www.dor.wa.gov .		
4. BUSINESS INFORMATION:			
How is your business organized? Please select	If filing as Corporation, non-profit, please attach a copy of 501(c) status.		
TAXPAYER IDENTIFICATION NUMBER (TIN) SSN: - - EIN: -	For individuals, this is your Social Security Number (SSN). For other entities (corporations, school districts, etc.) this is your Employer Identification Number (EIN).		
STATEWIDE VENDOR NUMBER -	Individuals awarded contracts with OSPI are required to register as a Statewide Vendor. Visit www.ofm.wa.gov to register as a Statewide Vendor .		
5. WASHINGTON STATE EMPLOYMENT (Not applicable to ESDs, School Districts, and State Agencies):			
Are you, or any of your business partners, directors, officers, managers, employees, or board members current or former (within the last 24 months) officers or employees of the State of Washington? <input type="checkbox"/> Yes <input type="checkbox"/> No			
If you answered yes or are unsure, you must contact the Executive Ethics Board for guidance. You can contact the Executive Ethics Board at 360-664-0871 or by email at ethics@atg.wa.gov. Submit a copy of the Executive Ethics Board decision to your OSPI Contract Manager.			
6. I certify, under penalty of perjury as provided by the laws of the State of Washington, that all of the foregoing statements are true and correct, and that I will notify OSPI of any changes in any statement.			
CONTRACTOR SIGNATURE		DATE	
PRINTED NAME		TITLE	

PLEASE RETURN THIS FORM TO YOUR OSPI PROGRAM MANAGER AS SOON AS POSSIBLE

EXHIBIT E – 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.

Traditional Assessment Specifications and Oversight – Technical Requirements (540 points)

A. Contractor Oversight – Methodology (65 points)

<i>Criteria</i>	E	G	A	M	N	NA
Proposal describes specific Vendor activities that will require collaboration and management oversight	10	8	6	4	0	
Proposal describes specific validity documentation that will require management oversight	10	8	6	4	0	
Proposal describes specific communication tasks that will require management oversight	10	8	6	4	0	
Proposal describes specific record keeping functions that will require management oversight	15	12	9	6	0	
Proposal presents appropriate plan for managing collaboration and communication among contractors	20	16	12	8	0	

A. 2.7. Style Guide – Methodology (75 points)

<i>Criteria</i>	E	G	A	M	N	NA
Proposal demonstrates understanding of the required elements of a style guide.	5	4	3	2	0	
Examples demonstrate clear expertise in the development of style guides.	10	8	6	4	0	
Proposal demonstrates understanding of grade level differentiation for style guides.	10	8	6	4	0	
Proposal demonstrates understanding of the unique style requirements for English language arts.	10	8	6	4	0	
Proposal demonstrates understanding of the unique style requirements for mathematics.	10	8	6	4	0	
Proposal demonstrates willingness to work collaboratively in the development of a style guide.	10	8	6	4	0	
Proposal demonstrates innovative thinking necessary for moving the field forward.	10	8	6	4	0	
Recommendations for improvements are anchored in relevant research.	10	8	6	4	0	

A. 2.2, 2.3, 2.4, 2.7 Specifications for SR and CR items - Methodology: (185 points)

<i>Criteria</i>	E	G	A	M	N	NA
Proposal demonstrates understanding of the role of content specifications in stimulus, item, and task specifications for English language arts.	15	12	9	6	0	
Proposal demonstrates understanding of the role of content specifications in stimulus, item, and task specifications for mathematics.	15	12	9	6	0	
Proposal demonstrates understanding of grade level differentiation for items, tasks, and stimulus materials.	10	8	6	4	0	
Proposal demonstrates understanding of the required elements of specifications for stimulus materials.	10	8	6	4	0	
Proposal demonstrates understanding of the required elements of general specifications for items and tasks.	10	8	6	4	0	
Proposal demonstrates understanding of the required elements of specifications for selected response items.	10	8	6	4	0	
Proposal demonstrates understanding of the required elements of specifications for constructed response items.	10	8	6	4	0	
Examples demonstrate clear expertise in the development of specifications for stimulus materials.	15	12	9	6	0	
Examples demonstrate expertise in the development of general specifications for item and tasks.	10	8	6	4	0	
Examples demonstrate clear expertise in the development of specifications for selected response items.	20	16	12	8	0	
Examples demonstrate clear expertise in the development of specifications for constructed response items.	20	16	12	8	0	
Proposal demonstrates willingness to work collaboratively in the development of stimulus, item, and task specifications.	10	8	6	4	0	
Proposal demonstrates innovative thinking necessary for moving the field forward.	20	16	12	8	0	
Recommendations for improvements are anchored in relevant research.	10	8	6	4	0	

B. Traditional Assessment Specifications and Oversight: Work Plan (60 points)

<i>Criteria</i>	E	G	A	M	N	NA
The proposed work plan is complete and addresses the scope of the project	10	8	6	4	0	
Level of detail proposed in the project work plan is appropriate for the project needs	20	16	12	8	0	
The implementation of the plan is likely to succeed	10	8	6	4	0	
The proposal includes a creative approach that is reasonable and that is worthy of consideration	20	16	12	8	0	

C. Traditional Assessment Specifications and Oversight: Project Schedule (50 points)

<i>Criteria</i>	E	G	A	M	N	NA
The schedule includes activities of a reasonable scope including key milestone dates	10	8	6	4	0	
Deliverables are scheduled to be provided in time to meet SBAC needs	30	24	18	9	0	
Major dependencies within the schedule have been identified	10	8	6	4	0	

D. Traditional Assessment Specifications and Oversight: Deliverables (50 points)

<i>Criteria</i>	E	G	A	M	N	NA
Deliverables are accurately identified and clearly described	20	16	12	8	0	
Deliverables will meet the SBAC's needs	10	8	6	4	0	
Strategies for monitoring and measuring outcomes are spelled out and appropriate	20	16	12	8	0	

E. Traditional Assessment Specifications and Oversight: Outcomes and Performance Measurement (40 points)

<i>Criteria</i>	E	G	A	M	N	NA
Overall work plan is well designed to achieve the stated outcomes	10	8	6	4	0	
Description to monitor/measure outcomes is thorough	20	16	14	8	0	
Description of how progress toward and delivery of outcomes will be provided to SBAC leadership	10	8	6	4	0	

F. Traditional Assessment Specifications and Oversight: Risks (15 points)

<i>Criteria</i>	E	G	A	M	N	NA
Potential risks are identified	5	4	3	2	0	
Strategies to be used to monitor and mitigate risks are described and appropriate	10	8	6	4	0	

Traditional Assessment Specifications and Oversight: Management Proposal (260 points)

A. Project Team Structure / Internal Controls (80 points)

<i>Criteria</i>	E	G	A	M	N	NA
Project management for entire project is adequately staffed in terms of time on project	20	16	12	8	0	
Project management for entire project is highly qualified regarding experience with other projects of similar scope and with similar audiences	25	20	15	10	0	
Management structure and internal controls described are clear and easy to communicate	20	16	12	8	0	
Lines of authority are clear, and access to decision makers appears straightforward	5	4	3	2	0	
The procedures described for escalating concerns are clear and likely to produce effective response	10	8	6	4	0	

B. Staff Qualifications/Experience (90 points)

<i>Criteria</i>	E	G	A	M	N	NA
Project team proposed for this component of the specifications work has the experience to successfully implement the proposal	20	16	12	8	0	
Project team proposed for this component of the specifications work is adequately resourced to successfully implement the proposal	10	8	6	4	0	
Management proposed for this component of the specifications work has the experience and resources to lead to success	20	16	12	8	0	
Relevant project team members have content and assessment expertise in English language arts	15	12	9	6	0	
Relevant project team members have content and assessment expertise in mathematics	15	12	9	6	0	
Relevant project team members have project management expertise	10	8	6	4	0	

C. Experience of the Vendor (90 points)

<i>Criteria</i>	E	G	A	M	N	NA
Experience of Vendor with similar projects provides solid evidence of ability to meet SBAC needs	20	16	12	8	0	
Provided samples of work clearly illustrate that the proposed list of deliverables will meet requirements	20	16	12	8	0	
Knowledge of/experience with of specific assessment issues (e.g., selected response items, rubrics, automated scoring, performance assessment, technology enhanced items)	30	24	18	12	0	
Knowledge of/experience with of SBAC context issues (e.g., computer based test administrations, CAT, integrated technology, evidence centered design)	20	16	12	8	0	

Specifications for Technology-Enhanced Items - Technical Requirements (500 points)

A. 2.5. Specifications for Technology-Enhanced Items – Methodology (255 points)

<i>Criteria</i>	E	G	A	M	N	NA
Proposal demonstrates understanding of the role of content specifications in item specifications for mathematics.	30	24	16	8	0	
Proposal demonstrates understanding of the role of content specifications in item specifications for English language arts.	30	24	16	8	0	
Proposal demonstrates understanding of the required elements of specifications for technology-enhanced items.	30	24	16	8	0	
Examples demonstrate clear expertise in the development of specifications for technology-enhanced items.	45	36	27	18	0	
Proposal demonstrates understanding of grade level differentiation for specifications.	25	20	15	10	0	
Proposal demonstrates willingness to work collaboratively in the development of specifications.	30	24	16	8	0	
Proposal demonstrates innovative thinking necessary for moving the field forward.	45	36	27	18	0	
Recommendations for improvements are anchored in relevant research.	20	16	12	8	0	

B. Specifications for Technology-Enhanced Items: Work Plan (60 points)

<i>Criteria</i>	E	G	A	M	N	NA
The proposed work plan is complete and addresses the scope of the project	10	8	6	4	0	
Level of detail proposed in the project work plan is appropriate for the project needs	20	16	12	9	0	
The implementation of the plan is likely to succeed	10	8	6	4	0	
The proposal includes a creative approach that is reasonable and that is worthy of consideration	20	16	12	9	0	

C. Specifications for Technology-Enhanced Items: Project Schedule (50 points)

<i>Criteria</i>	E	G	A	M	N	NA
The schedule includes activities of a reasonable scope including key milestone dates	10	8	6	4	0	
Deliverables are scheduled to be provided in time to meet <i>SBAC needs</i>	30	24	16	8	0	
Major dependencies within the schedule have been identified	10	8	6	4	0	

D. Specifications for Technology-Enhanced Items: Deliverables (80 points)

<i>Criteria</i>	E	G	A	M	N	NA
Deliverables are accurately identified and clearly described	30	25	20	15	0	
Deliverables will meet the SBAC's needs	20	16	12	9	0	
Strategies for monitoring and measuring outcomes are spelled out and appropriate	30	25	20	15	0	

E. Specifications for Technology-Enhanced Items: Outcomes and Performance Measurement (40 points)

<i>Criteria</i>	E	G	A	M	N	NA
Overall work plan is well designed to achieve the stated outcomes	10	8	6	4	0	
Description to monitor/measure outcomes is thorough	20	16	12	8	0	
There is a clear description of how progress toward and delivery of outcomes will be provided to SBAC leadership	10	8	6	4	0	

F. Specifications for Technology-Enhanced Items: Risks (15 points)

<i>Criteria</i>	E	G	A	M	N	NA
Potential risks are identified	5	4	3	2	0	
Strategies to be used to monitor and mitigate risks are described and appropriate	10	8	6	4	0	

Specifications for Technology-Enhanced Items: Management Proposal (300 points)

A. Project Team Structure / Internal Controls (120 points)

<i>Criteria</i>	E	G	A	M	N	NA
Project management for entire project is adequately staffed in terms of time on project	30	24	18	12	0	
Project management for entire project is highly qualified regarding experience with other projects of similar scope and with similar audiences	35	25	20	15	0	
Management structure and internal controls described are clear and easy to communicate	30	24	18	12	0	
Lines of authority are clear, and access to decision makers appears straightforward	10	4	3	2	0	
The procedures described for escalating concerns are clear and likely to produce effective response	15	12	9	6	0	

B. Staff Qualifications/Experience (90 points)

<i>Criteria</i>	E	G	A	M	N	NA
Project team proposed for this component of the specifications work has the experience to successfully implement the proposal	20	16	12	8	0	
Project team proposed for this component of the specifications work is adequately resourced to successfully implement the proposal	10	8	6	4	0	
Management proposed for this component of the specifications work has the experience and resources to lead to success	20	16	12	8	0	
Relevant project team members have content and assessment expertise in English language arts	15	12	9	6	0	
Relevant project team members have content and assessment expertise in mathematics	15	12	9	6	0	
Relevant project team members have project management expertise	10	8	6	4	0	

C. Experience of the Vendor (90 points)

<i>Criteria</i>	E	G	A	M	N	NA
Experience of Vendor with similar projects provides solid evidence of ability to meet SBAC needs	20	16	12	8	0	
Provided samples of work clearly illustrate that the proposed list of deliverables will meet requirements	20	16	12	8	0	
Knowledge of/experience with of specific assessment issues (e.g., selected response items, rubrics, automated scoring, performance assessment, technology enhanced items)	30	25	20	15	0	
Knowledge of/experience with of SBAC context issues (e.g., computer based test administrations, CAT, integrated technology, evidence centered design)	20	16	12	8	0	

Specifications for Performance Tasks – Technical Requirements (500 points)

A. 2.6. Specifications for Performance Tasks – Methodology (255 points)

Criteria	E	G	A	M	N	NA
Proposal demonstrates understanding of the role of content specifications in item specifications for mathematics.	30	24	18	12	0	
Proposal demonstrates understanding of the role of content specifications in item specifications for English language arts.	30	24	18	12	0	
Proposal demonstrates understanding of the required elements of specifications for complex performance tasks.	30	24	18	12	0	
Examples demonstrate clear expertise in the development of specifications for performance tasks.	45	36	27	18	0	
Proposal demonstrates understanding of grade level differentiation for specifications.	25	20	15	10	0	
Proposal demonstrates willingness to work collaboratively in the development of specifications.	30	24	18	12	0	
Proposal demonstrates innovative thinking necessary for moving the field forward.	35	28	21	14	0	
Recommendations for improvements are anchored in relevant research.	30	24	18	12	0	

B. Specifications for Performance Tasks: Work Plan (60 points)

Criteria	E	G	A	M	N	NA
The proposed work plan is complete and addresses the scope of the project	10	8	6	4	0	
Level of detail proposed in the project work plan is appropriate for the project needs	20	16	12	9	0	
The implementation of the plan is likely to succeed	10	8	6	4	0	
The proposal includes a creative approach that is reasonable and that is worthy of consideration	20	16	12	9	0	

C. Specifications for Performance Tasks: Project Schedule (50 points)

Criteria	E	G	A	M	N	NA
The schedule includes activities of a reasonable scope including key milestone dates	10	8	6	4	0	
Deliverables are scheduled to be provided in time to meet SBAC needs	30	24	18	12	0	
Major dependencies within the schedule have been identified	10	8	6	4	0	

D. Specifications for Performance Tasks: Deliverables (80 points)

Criteria	E	G	A	M	N	NA
Deliverables are accurately identified and clearly described	30	24	18	12	0	
Deliverables will meet the SBAC's needs	20	16	12	8	0	
Strategies for monitoring and measuring outcomes are spelled out and appropriate	30	24	18	12	0	

E. Specifications for Performance Tasks: Outcomes and Performance Measurement (40 points)

<i>Criteria</i>	E	G	A	M	N	NA
Overall work plan is well designed to achieve the stated outcomes	10	8	6	4	0	
Description to monitor/measure outcomes is thorough	20	16	12	9	0	
There is a clear description of how progress toward and delivery of outcomes will be provided to SBAC leadership	10	8	6	4	0	

F. Specifications for Performance Tasks: Risks (15 points)

<i>Criteria</i>	E	G	A	M	N	NA
Potential risks are identified	5	4	3	2	0	
Strategies to be used to monitor and mitigate risks are described and appropriate	10	8	6	4	0	

Specifications for Performance Tasks: Management Proposal (300 points)

A. Project Team Structure / Internal Controls (120 points)

<i>Criteria</i>	E	G	A	M	N	NA
Project management for entire project is adequately staffed in terms of time on project	30	24	18	12	0	
Project management for entire project is highly qualified regarding experience with other projects of similar scope and with similar audiences	35	28	21	14	0	
Management structure and internal controls described are clear and easy to communicate	30	24	18	12	0	
Lines of authority are clear, and access to decision makers appears straightforward	10	8	6	4	0	
The procedures described for escalating concerns are clear and likely to produce effective response	15	12	9	6	0	

B. Staff Qualifications/Experience (90 points)

<i>Criteria</i>	E	G	A	M	N	NA
Project team proposed for this component of the specifications work has the experience to successfully implement the proposal	20	16	12	8	0	
Project team proposed for this component of the specifications work is adequately resourced to successfully implement the proposal	10	8	6	4	0	
Management proposed for this component of the specifications work has the experience and resources to lead to success	20	16	12	8	0	
Relevant project team members have content and assessment expertise in English language arts	15	12	9	6	0	
Relevant project team members have content and assessment expertise in mathematics	15	12	9	6	0	
Relevant project team members have project management expertise	10	8	6	4	0	

C. Experience of the Vendor (90 points)

<i>Criteria</i>	E	G	A	M	N	NA
Experience of Vendor with similar projects provides solid evidence of ability to meet SBAC needs	20	16	12	8	0	
Provided samples of work clearly illustrate that the proposed list of deliverables will meet requirements	20	15	10	5	0	
Knowledge of/experience with of specific assessment issues (e.g., selected response items, rubrics, automated scoring, performance assessment, technology enhanced items)	30	24	18	12	0	
Knowledge of/experience with of SBAC context issues (e.g., computer based test administrations, CAT, integrated technology, evidence centered design)	20	16	12	8	16	

Technical Requirements – Bias and Sensitivity Guidelines (540 points)

A. 2.8 Bias and Sensitivity Guidelines – Methodology (300 points)

<i>Criteria</i>	E	G	A	M	N	NA
Proposal demonstrates understanding of the potential sources of bias and insensitivity in the development (drafting and editing) of stimulus materials, items, and tasks.	40	32	24	16	0	
Examples demonstrate clear expertise in minimizing bias/insensitivity in stimulus materials, items, and tasks through <i>development procedures</i> .	40	32	24	16	0	
Examples demonstrate clear expertise in minimizing bias/insensitivity in stimulus materials, items, and tasks through <i>editorial review procedures</i> .	40	32	24	16	0	
Examples demonstrate clear expertise in developing high quality <i>bias and sensitivity review training materials</i> .	40	32	24	16	0	
Proposal demonstrates willingness to work collaboratively in the development of bias and sensitivity guidelines.	40	32	24	16	0	
Proposal demonstrates innovative thinking necessary for moving the field forward.	40	32	24	16	0	
Recommendations for improvements are anchored in relevant research.	60	48	36	24	0	

B. Bias and Sensitivity Guidelines: Work Plan (60 points)

<i>Criteria</i>	E	G	A	M	N	NA
The proposed work plan is complete and addresses the scope of the project	10	8	6	4	0	
Level of detail proposed in the project work plan is appropriate for the project needs	20	16	12	8	0	
The implementation of the plan is likely to succeed	10	8	6	4	0	
The proposal includes a creative approach that is reasonable and that is worthy of consideration	20	16	12	8	0	

C. Bias and Sensitivity Guidelines: Project Schedule (50 points)

<i>Criteria</i>	E	G	A	M	N	NA
The schedule includes activities of a reasonable scope including key milestone dates	10	8	6	4	0	
Deliverables are scheduled to be provided in time to meet <i>SBAC needs</i>	30	24	18	12	0	
Major dependencies within the schedule have been identified	10	8	6	4	0	

D. Bias and Sensitivity Guidelines: Deliverables (50 points)

<i>Criteria</i>	E	G	A	M	N	NA
Deliverables are accurately identified and clearly described	20	16	12	8	0	
Deliverables will meet the SBAC's needs	10	8	6	4	0	
Strategies for monitoring and measuring outcomes are spelled out and appropriate	20	16	12	8	0	

E. Bias and Sensitivity Guidelines: Outcomes and Performance Measurement (40 points)

<i>Criteria</i>	E	G	A	M	N	NA
Overall work plan is well designed to achieve the stated outcomes	10	8	6	4	0	
Description to monitor/measure outcomes is thorough	20	16	12	8	0	
There is a clear description of how progress toward and delivery of outcomes will be provided to SBAC leadership	10	8	6	4	0	

F. Bias and Sensitivity Guidelines: Risks (40 points)

<i>Criteria</i>	E	G	A	M	N	NA
Potential risks are identified	10	8	6	4	0	
Strategies to be used to monitor and mitigate risks are described and appropriate	30	24	18	12	0	

Bias and Sensitivity Guidelines: Management Proposal (260 points)

A. Project Team Structure / Internal Controls (80 points)

<i>Criteria</i>	E	G	A	M	N	NA
Project management for entire project is adequately staffed in terms of time on project	20	16	12	8	0	
Project management for entire project is highly qualified regarding experience with other projects of similar scope and with similar audiences	25	20	15	10	0	
Management structure and internal controls described are clear and easy to communicate	20	16	12	8	0	
Lines of authority are clear, and access to decision makers appears straightforward	5	4	3	2	0	
The procedures described for escalating concerns are clear and likely to produce effective response	10	8	6	4	0	

B. Staff Qualifications/Experience (90 points)

<i>Criteria</i>	E	G	A	M	N	NA
Project team proposed for this component of the specifications work has the experience to successfully implement the proposal	20	16	12	8	0	
Project team proposed for this component of the specifications work is adequately resourced to successfully implement the proposal	10	8	6	4	0	
Management proposed for this component of the specifications work has the experience and resources to lead to success	20	16	12	8	0	
Relevant project team members have knowledge of and experience with bias and sensitivity issues in English language arts	20	16	12	8	0	
Relevant project team members have knowledge of and experience with bias and sensitivity issues in mathematics	10	8	6	4	0	
Relevant project team members have project management expertise	10	8	6	4	0	

C. Experience of the Vendor (90 points)

<i>Criteria</i>	E	G	A	M	N	NA
Experience of Vendor with similar projects provides solid evidence of ability to meet SBAC needs	20	16	12	8	0	
Provided samples of work clearly illustrate that the proposed list of deliverables will meet requirements	20	16	12	8	0	
Knowledge of/experience with of specific assessment issues (e.g., selected response items, rubrics, automated scoring, performance assessment, technology enhanced items)	30	24	18	12	0	
Knowledge of/experience with of SBAC context issues (e.g., computer based test administrations, CAT, integrated technology, evidence centered design)	20	16	12	8	0	

Technical Requirements – Accessibility and Accommodation Guidelines (530 points)

A. 2.9 Accessibility and Accommodation Guidelines – Methodology (320 points)

<i>Criteria</i>	E	G	A	M	N	NA
Proposal demonstrates understanding of the strategies required to ensure broad access to stimulus materials, items, and tasks in English language arts and mathematics	40	32	24	16	0	
Proposal demonstrates understanding of the strategies required to accommodate stimulus materials, items, and tasks for students with specific needs in English language arts and mathematics	40	32	24	16	0	
Examples demonstrate clear expertise in ensuring broad access to stimulus materials, items, and tasks in English language arts and mathematics.	40	32	24	16	0	
Examples demonstrate clear expertise in providing accommodations for stimulus materials, items, and tasks for students with specific needs in English language arts and mathematics.	40	32	24	16	0	
Proposal demonstrates willingness to work collaboratively in the development of access and accommodation guidelines.	40	32	24	16	0	
Proposal demonstrates innovative thinking necessary for moving the field forward.	60	48	36	24	0	
Recommendations for improvements are anchored in relevant research.	60	48	36	24	0	

B. Accessibility and Accommodation Guidelines: Work Plan (60 points)

<i>Criteria</i>	E	G	A	M	N	NA
The proposed work plan is complete and addresses the scope of the project	10	8	6	4	0	
Level of detail proposed in the project work plan is appropriate for the project needs	20	16	12	8	0	
The implementation of the plan is likely to succeed	10	8	6	4	0	
The proposal includes a creative approach that is reasonable and that is worthy of consideration	20	16	12	8	0	

C. Accessibility and Accommodation Guidelines: Project Schedule (45 points)

<i>Criteria</i>	E	G	A	M	N	NA
The schedule includes activities of a reasonable scope including key milestone dates	10	8	6	4	0	
Deliverables are scheduled to be provided in time to meet <i>SBAC needs</i>	25	20	15	10	0	
Major dependencies within the schedule have been identified	10	8	6	4	0	

D. Accessibility and Accommodation Guidelines: Deliverables (50 points)

<i>Criteria</i>	E	G	A	M	N	NA
Deliverables are accurately identified and clearly described	20	16	12	8	0	
Deliverables will meet the SBAC's needs	10	8	6	4	0	
Strategies for monitoring and measuring outcomes are spelled out and appropriate	20	16	12	8	0	

E. Accessibility and Accommodation Guidelines: Outcomes and Performance Measurement (40 points)

<i>Criteria</i>	E	G	A	M	N	NA
Overall work plan is well designed to achieve the stated outcomes	10	8	6	4	0	
Description to monitor/measure outcomes is thorough	20	16	12	8	0	
There is a clear description of how progress toward and delivery of outcomes will be provided to SBAC leadership	10	8	6	4	0	

F. Accessibility and Accommodation Guidelines: Risks (15 points)

<i>Criteria</i>	E	G	A	M	N	NA
Potential risks are identified	5	4	3	2	0	
Strategies to be used to monitor and mitigate risks are described and appropriate	10	8	6	4	0	

Accessibility and Accommodation Guidelines: Management Proposal (270 points)

A. Project Team Structure / Internal Controls (70 points)

<i>Criteria</i>	E	G	A	M	N	NA
Project management for entire project is adequately staffed in terms of time on project	20	16	12	8	0	
Project management for entire project is highly qualified regarding experience with other projects of similar scope and with similar audiences	25	20	15	10	0	
Management structure and internal controls described are clear and easy to communicate	10	8	6	4	0	
Lines of authority are clear, and access to decision makers appears straightforward	5	4	3	2	0	
The procedures described for escalating concerns are clear and likely to produce effective response	10	8	6	4	0	

B. Staff Qualifications/Experience (90 points)

<i>Criteria</i>	E	G	A	M	N	NA
Project team proposed for this component of the specifications work has the experience to successfully implement the proposal	20	16	12	8	0	
Project team proposed for this component of the specifications work is adequately resourced to successfully implement the proposal	10	8	6	4	0	
Management proposed for this component of the specifications work has the experience and resources to lead to success	20	16	12	8	0	
Relevant project team members have knowledge of and experience with accessibility and assessment accommodations in English language arts	15	12	9	6	0	
Relevant project team members have knowledge of and experience with accessibility and assessment accommodations in mathematics	15	12	9	6	0	
Relevant project team members have project management expertise	10	8	6	4		

C. Experience of the Vendor (110 points)

<i>Criteria</i>	E	G	A	M	N	NA
Experience of Vendor with similar projects provides solid evidence of ability to meet SBAC needs	20	16	12	8	0	
Provided samples of work clearly illustrate that the proposed list of deliverables will meet requirements	20	16	12	8	0	
Knowledge of/experience with of specific assessment issues (e.g., selected response items, rubrics, automated scoring, performance assessment, technology enhanced items)	30	24	18	12	0	
Knowledge of/experience with of SBAC context issues (e.g., computer based test administrations, CAT, integrated technology, evidence centered design)	40	32	24	16	0	

Appendix A
SMARTER Balanced Assessment Consortium Specifications
Table of Contents

1. Style Guide
 - A. **Style guide for stimulus materials**
 - B. **Art specs**
 - C. **Graphic specs**
 - D. **Numerical specs**
 - E. **Decimal specs**
 - F. **Fraction specs**
 - G. **Exponential specs**
 - H. **Fonts and font sizes**
 - I. **Etcetera**

2. Bias and Sensitivity Guidelines
Guidelines that represent the best thinking across member states

3. Accessibility and Accommodations Guidelines for item development

4. Specifications for the stimulus materials
 - General stimulus specifications that apply to all stimuli**
 - Stimulus specific specifications**
 - A. **English language arts grade level stimulus specifications**
 - B. **Mathematics grade level stimulus specifications**

4. Item/Task Specifications
 - A. **General specifications for all English language arts (ELA) selected response items, constructed response items, technology-enhanced items/tasks and performance tasks**

 - B. **Specific ELA Item Specifications (by grade level or grade level band where appropriate)**

i. Selected Response (SR) items:

Gr 3

- **General specifications for selected response items**
- **Item specifications for individual standards**
- **Item specifications for integrative items**

Gr 4

- **General specifications for selected response items**
- **Item specifications for individual standards**
- **Item specifications for integrative items**

Gr 5

- **General specifications for selected response items**
- **Item specifications for individual standards**
- **Item specifications for integrative items**

Gr 6

- **General specifications for selected response items**
- **Item specifications for individual standards**
- **Item specifications for integrative items**

Gr 7

- **General specifications for selected response items**
- **Item specifications for individual standards**
- **Item specifications for integrative items**

Gr 8

- **General specifications for selected response items**
- **Item specifications for individual standards**
- **Item specifications for integrative items**

High School

- **General specifications for selected response items**
- **Item specifications for individual standards**
- **Item specifications for integrative items**



ii. Constructed Response (CR) items²:

Gr 3

- **General specifications for constructed response items**
- **Item specifications for individual standards**
- **Item specifications for integrative items**

Gr 4

- **General specifications for constructed response items**
- **Item specifications for individual standards**
- **Item specifications for integrative items**

Gr 5

- **General specifications for constructed response items**
- **Item specifications for individual standards**
- **Item specifications for integrative items**

Gr 6

- **General specifications for constructed response items**
- **Item specifications for individual standards**
- **Item specifications for integrative items**

Gr 7

- **General specifications for constructed response items**
- **Item specifications for individual standards**
- **Item specifications for integrative items**

Gr 8

- **General specifications for constructed response items**
- **Item specifications for individual standards**
- **Item specifications for integrative items**

High School

- **General specifications for constructed response items**
- **Item specifications for individual standards**
- **Item specifications for integrative items**



² Same level of detail as in SR items with characteristics unique to CR items

iii. Technology-Enhanced (TE) items and tasks³:

Gr 3

- **General specifications for technology-enhanced items**
- **Item specifications for individual standards**
- **Item specifications for integrative items**

Gr 4

- **General specifications for technology-enhanced items**
- **Item specifications for individual standards**
- **Item specifications for integrative items**

Gr 5

- **General specifications for technology-enhanced items**
- **Item specifications for individual standards**
- **Item specifications for integrative items**

Gr 6

- **General specifications for technology-enhanced items**
- **Item specifications for individual standards**
- **Item specifications for integrative items**

Gr 7

- **General specifications for technology-enhanced items**
- **Item specifications for individual standards**
- **Item specifications for integrative items**

Gr 8

- **General specifications for technology-enhanced items**
- **Item specifications for individual standards**
- **Item specifications for integrative items**
- **Specifications for innovative technology-enhanced tasks**
-

High School

- **General specifications for technology-enhanced item/tasks**
- **Items for individual standards**
- **Item Specifications for Integrative items**

³ Same level of detail as in SR items with characteristics unique to TE items

iv. Performance Tasks (PT):⁴

Gr 3

- **General specifications for all performance tasks**
- **Specifications for individual performance tasks**

Gr 4

- **General specifications for all performance tasks**
- **Specifications for individual performance tasks**

Gr 5

- **General specifications for all performance tasks**
- **Specifications for individual performance tasks**

Gr 6

- **General specifications for all performance tasks**
- **Specifications for individual performance tasks**

Gr 7

- **General specifications for all performance tasks**
- **Specifications for individual performance tasks**

Gr 8

- **General specifications for all performance tasks**
- **Specifications for individual performance tasks**

High School

- **General specifications for all performance tasks**
- **Specifications for individual performance tasks**

C. General Specifications for all Mathematics selected response items, constructed response items, technology-enhanced items/tasks and performance tasks

D. Mathematics Item Specifications (by grade level or grade level band where appropriate)

⁴ **Details determined by features of English language arts task templates**

i. Selected Response (SR) items⁵:

Gr 3

- **General specifications for selected response items**
- **Item specifications for individual standards**
- **Item specifications for integrative items**

Gr 4

- **General specifications for selected response items**
- **Item specifications for individual standards**
- **Item specifications for integrative items**

Gr 5

- **General specifications for selected response items**
- **Item specifications for individual standards**
- **Item specifications for integrative items**

Gr 6

- **General specifications for selected response items**
- **Item specifications for individual standards**
- **Item specifications for integrative items**

Gr 7

- **General specifications for selected response items**
- **Item specifications for individual standards**
- **Item specifications for integrative items**

Gr 8

- **General specifications for selected response items**
- **Item specifications for individual standards**
- **Item specifications for integrative items**

High School

- **General specifications for selected response items**
- **Item specifications for individual standards**
- **Item specifications for integrative items**

⁵ **Same level of detail as for SR items for English language arts**

ii. Constructed Response (CR) items⁶:

Gr 3

- **General specifications for constructed response items**
- **Item specifications for individual standards**
- **Item specifications for integrative items**

Gr 4

- **General specifications for constructed response items**
- **Item specifications for individual standards**
- **Item specifications for integrative items**

Gr 5

- **General specifications for constructed response items**
- **Item specifications for individual standardstandards**
- **Item specifications for integrative items**

Gr 6

- **General specifications for constructed response items**
- **Item specifications for individual standards**
- **Item specifications for integrative items**

Gr 7

- **General specifications for constructed response items**
- **Item specifications for individual standards**
- **Item specifications for integrative items**

Gr 8

- **General specifications for constructed response items**
- **Item specifications for individual standards**
- **Item specifications for integrative items**

High School

- **General specifications for constructed response items**
- **Item specifications for individual standards**
- **Item specifications for integrative items**

⁶ Same level of detail as in SR items with characteristics unique to CR items

iii. Technology-Enhanced (TE) items and tasks⁷:

Gr 3

- General specifications for technology-enhanced items
- Item specifications for individual standards
- Item specifications for integrative items

Gr 4

- General specifications for technology-enhanced items
- Item specifications for individual standards
- **Item specifications for integrative items**

Gr 5

- General specifications for technology-enhanced items
- Item specifications for individual standards
- Item specifications for integrative items

Gr 6

- General specifications for technology-enhanced items
- **Item specifications for individual standards**
- Item specifications for integrative items

Gr 7

- General specifications for technology-enhanced items
- Item specifications for individual standards
- Item specifications for integrative items

Gr 8

- General specifications for technology-enhanced items
- Item specifications for individual standards
- Item specifications for integrative items

High School

- General specifications for technology-enhanced item/tasks
- Item specifications for individual standards
- **Item specifications for integrative items**

⁷ Same level of detail as in SR items with characteristics unique to TE items

iv. Performance tasks (PT) ⁸:

Gr 3

- **General specifications for all performance tasks**
- **Specifications for individual performance tasks**

Gr 4

- **General specifications for all performance tasks**
- **Specifications for individual performance tasks**

Gr 5

- **General specifications for all performance tasks**
- **Specifications for individual performance tasks**

Gr 6

- **General specifications for all performance tasks**
- **Specifications for individual performance tasks**

Gr 7

- **General specifications for all performance tasks**
- **Specifications for individual performance tasks**

Gr 8

- **General specifications for all performance tasks**
- **Specifications for individual performance tasks**

High School

- **General specifications for all performance tasks**
- **Specifications for individual performance tasks**

⁸ **Details determined by features of Mathematics task templates**

Appendix B
SBAC English-Language Arts Content Specifications

<http://www.k12.wa.us/SMARTER/ContentSpecs/ELA-LiteracyContentSpecifications.pdf>

<http://www.k12.wa.us/SMARTER/ContentSpecs/ELA-LiteracyContentSpecificationsAppend.pdf>

Appendix C
SBAC Mathematics Content Specifications

<http://www.k12.wa.us/SMARTER/ContentSpecs/MathContentSpecifications.pdf>

<http://www.k12.wa.us/SMARTER/ContentSpecs/MathContentSpecificationsAppendix.pdf>

Appendix D
Example Elements of Bias and Sensitivity Guidelines

Regional Considerations

Race Consideration

Ethnic/Cultural Considerations

Sex Considerations

Religious Considerations

Age Considerations

Disability Considerations

Socio Economic Considerations

Language Considerations

Sensitivity Issues

Other considerations recommended by contractor and based on SBAC states' guidelines