

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

Addendum 1 and Amendment 1 to  
Smarter Balanced Assessment Consortium Request For Proposals (RFP):  
SBAC RFP-08

Note to potential respondents:

- This Addendum is intended to revise, clarify and become part of the *SMARTER Balanced Assessment Consortium Request for Participation and Training Materials* (SBAC RFP-08), issued October 14, 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.**

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Addendum 1: Includes eight pages of responses to vendor questions.

Amendment 1: Amend language associated with the Twice Annual Contractor Meetings; General Timeline of SBAC activities related to this Contract; and adjust the posting date of the Final Questions and Answers.

Addendum 1 SBAC RFP-08  
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Questions & Answers

**PROJECT TITLE: SMARTER Balanced Assessment CONSORTIUM Participation and Training Materials**

<b>Section A</b>	<b>INTRODUCTION</b> <b>4. Objective and Scope of Work – number 2</b>	<b>pg. 11</b>
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Q1. Objective 2 refers to Item/Task Writing material to “train Item Writer Trainers and materials for Item Writer Trainers to use to train Item Writers.” The Part 2 Tasks on page 23 and the description on page 27 do not mention the development of train-the-trainer materials. Please clarify whether materials should be developed for a train-the-trainer model or whether Contractors are free to propose a different training model.  
**Answer:** Contractors are free to propose a different training model if they can demonstrate that such a model better meets the objectives outlined in the SBAC Grant and this Request for Proposals.

<b>Section A</b>	<b>INTRODUCTION</b> <b>4. Objective and Scope of Work – number 6</b>	<b>pg. 12</b>
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Q2. The RFP identifies many parties (SBAC leadership, work groups, other vendors) that will participate in a collaborative iterative review and feedback process on deliverables. Given the diversity of these parties it is possible that feedback at times may be contradictory and inconsistent. Will SBAC identify specific decision-makers for individual deliverables who will resolve feedback issues such that final deliverables may be produced in an orderly and efficient manner?  
**Answer:** Yes.

<b>Section A</b>	<b>INTRODUCTION</b> <b>4. Objective and Scope of Work – number 7</b> <b>and</b>	<b>pg. 12</b>
<b>Section C</b>	<b>Twice Annual Contractor Meetings</b>	<b>pg. 30</b>

Q3. The overall objective and scope of work summary list indicates that the Contractor will coordinate and finance all face-to-face and online meetings and review processes. Please confirm that proposers should cost only for the twice annual contractor meetings (see page 30) for which \$39,392 should be budgeted.  
**Answer:** SMARTER Balanced has determined that it would make for better fiscal accounting if the Consortium address the travel needs of its members for these twice-annual meetings, so the \$39,392 are to be excluded from the bid. All other travel associated with execution of a contraction should be borne within the cost proposal provided (and within the \$2.2M budget), inclusive of both contractor staff and SMARTER Balanced members. The cost of representation at the twice-annual meetings will also be the responsibility of the contractor and are to be borne within the available budget of \$2.2M. Representation of the Participation and Training Materials Provider at these twice-annual meetings is expected to be a minimum of three people at XX meetings (the actual schedule to be determined during the course of contract fulfillment).

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Q4. Please provide details on the number of meetings, whether face-to-face or online, the purpose of each, the number of attendees expected, and location preferences.  
**Answer:** Most contact will be completed electronically (e.g., webex, conference calls). The twice-annual meetings will be face-to-face Consortium-level meetings scheduled such that all workgroups and contractors can meet in a conference-like setting. Additionally, it is typically advisable to schedule 1 or 2 face to face meetings as a kick-off process.

<b>Section C</b>	<b>PROPOSAL CONTENTS</b>	
	<b>3. Technical Proposal</b>	<b>pg. 21</b>
	<b>3. Management Proposal</b>	<b>pg. 31</b>
	<b>4. Cost Proposal</b>	<b>pg. 32</b>

Q5. Please confirm that it will be acceptable to deliver a single proposal with the following structure:

- One Technical Proposal covering Parts 1, 2 and 3 within section A -Project Approach/Methodology, then one inclusive narrative each for sections B through F. This would include a single Project Schedule covering all activity for Parts 1, 2 and 3.
- One Management Proposal
- One Cost Proposal with one set of combined costs covering Parts 1, 2 and 3.

**Answer:** Confirmed.

<b>Section C</b>	<b>PROPOSAL CONTENTS</b>	<b>pg. 21</b>
	<b>A. Project Approach/Methodology</b>	
	<b>Part 1 Expected Outcomes</b>	

Q6. The Expected Outcomes of Task 1 refer to a variety of assessment development activities, including Data Reviews, but no specific tasks in Part 1 refer to Data Reviews. Please confirm that other than addressing Data Reviews in the general Participation Policies and Guidelines, that this Solicitation does not include the development of distinct criteria for the recruitment and selection of Data Review members or in the development of Data Review training materials.

**Answer:** Confirmed.

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<b>Section C</b>	<b>PROPOSAL CONTENTS</b> <b>A. Project Approach/Methodology</b> <b>Part 1 Tasks, bullet 2</b>	<b>pg. 21</b>
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Q7. Does the SBAC contemplate that individual states will be responsible for stimulus/item/task writing or will potential writers come from participating states, but not under their direction, according to the participation policies developed under this RFP?

**Answer:** At a system level, we anticipate that both will be true. Based on the SBAC grant proposal, Item writers from member states will be employed by states under the direction of states based on intergovernmental agreements with the State of Washington. In addition, service providers with specific expertise in item/task/stimulus writing will compete for contracts from the State of Washington and will likely employ item writers from member states. Consistent with our theory of action and the core principals of our consortium, we anticipate that these writers will predominately be comprised of teachers.

<b>Section C</b>	<b>PROPOSAL CONTENTS</b> <b>A. Project Approach/Methodology</b> <b>Part 1 Tasks (continued), bullet 5</b>	<b>pg. 22</b>
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Q8. What are SBAC definitions/specifications for pilot and field testing?

**Answer:** Pilot testing and field testing will occur as part of SBAC Contract #19 (see SBAC Master Work Plan). Pilot testing will be on a smaller scale than field testing. The primary purposes of pilot testing are to determine how item types perform based on traditional statistical measures and to establish the scale(s) for the full item bank. Field testing will be on a very large scale, presenting all items/tasks that will be used operationally, to a statistically significant sample of students. A primary purpose of field testing is to place operational items on the CAT scale(s) and to assess the validity and operation of the performance tasks.

Q9. Is the SBAC's expectation that participation policies for pilot testing and standard setting include testing and sampling design?

**Answer:** It is likely that these will be included in these policies. This is one of many issues to be addressed as these policies and guidelines are crafted (a process outcome of this contract).

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<b>Section C</b>	<b>PROPOSAL CONTENTS</b>	<b>pg. 23</b>
	<b>A. Project Approach/Methodology</b>	
	<b>Part 2 Tasks, bullet 1</b>	

Q10. Will the sample items from the product of RFP #4—Item Specifications be available for use as examples of acceptable items, tasks, rubrics, and technology enhanced items?  
**Answer: Yes.**

<b>Section C</b>	<b>PROPOSAL CONTENTS</b>	<b>pg. 23</b>
	<b>A. Project Approach/Methodology</b>	
	<b>Part 2 Tasks, bullet 2</b>	
	<b>and</b>	
<b>Exhibit F</b>	<b>Evaluation Criteria</b>	<b>pg. 57</b>
	<b>Part 2 (L1: 10) Develop Item/Task Writing Training Materials, bullet 12</b>	

Q11. This task describes the development of face-to-face and online training modules. The evaluation criteria for this task (page 57) refer to the development of an online delivery system for item writer training. Please confirm that the creation of an online delivery system (i.e., platform) for the delivery of the online training modules is beyond the scope of work of this solicitation. Please clarify what you mean by “on-line delivery system.”

**Answer: The creation of an online delivery system (i.e., platform) for the delivery of the online training modules is beyond the scope of work of this solicitation. In bullet 12 on page 57, “on-line delivery system.” should be “online training modules.” Please note that the required method of delivery of the modules should not be tied to a propriety delivery platform if the platform is not also offered with the modules.**

Q12. “Develop face-to-face and online interactive-electronic item/task/stimulus training modules, including practice and qualification procedures.”

a. Is the contractor responsible for developing the interactive training modules or only the content for those modules?

**Answer: The contractor is responsible for developing the content for the training modules, not the online delivery system (i.e., platform). Please note that the required method of delivery of the modules should not be tied to a propriety delivery platform if the platform is not also offered with the modules.**

b. Is the contractor responsible for developing qualification tasks that determine eligibility in an automated manner? If so, is the contractor responsible for establishing the validity of eligibility decisions?

**Answer: The vendor should propose their solution to fulfill the need for qualification procedures, both to determine eligibility and establish validity of the associated eligibility decisions.**

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c. Is the contractor responsible for developing the platform on which the interactive training modules and/or qualification tasks are delivered?

**Answer:** No. See Q11 and Q12.

d. Is the contractor responsible for hosting the delivery of the interactive training modules?

**Answer:** No. See Q11 and Q12.

<b>Section C</b>	<b>PROPOSAL CONTENTS</b> <b>A. Project Approach/Methodology</b> <b>Part 2 Tasks, bullet 3 and 4</b>	<b>pg. 23</b>
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Q13. “Develop quality control guidelines and procedures to ensure item/task writers are adequately trained and to assess item/task writers’ ability to follow procedures and adhere to specifications and guidelines.”

Is the contractor responsible for developing the guidelines and procedures that are later enacted in an on-line monitoring system, OR is the contractor responsible for developing an operational monitoring system?

**Answer:** The contractor is responsible for developing the guidelines and procedures that will be enacted later by those contracted to procure items,

Q14. “Develop online and face-to-face item/task/stimulus writing guidelines and procedures.”

Please explain the difference between this task and the first bulleted task for Part 2 – “Develop training materials for online and face-to-face item/task/stimulus writing...”?

**Answer:** The 4<sup>th</sup> bullet in Task 2 speaks to the guidelines and procedures of this process and the 1<sup>st</sup> bullet in Task 2 speaks to the training materials that result from the guidelines and procedures.

<b>Section C</b>	<b>PROPOSAL CONTENTS</b> <b>A. Project Approach/Methodology</b> <b>Part 3 Tasks</b> <b>and</b> <b>Part 3a Criteria</b>	<b>pg. 23</b>       <b>pg. 58</b>
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Q15. “Recruit, recommend and notify successful and non-successful applications for membership on committees consistent with SBAC participation policies and guidelines for assessment development and implementation work”

“Proposal presents a plan for recruiting and selecting review committee members consistent with SBAC activities participation policies.”

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The task cited first, above, implies that the contractor is responsible for recruiting and evaluating qualifications of participants. The criterion for this task, cited second above, implies that the contractor is only responsible for developing a plan for recruitment and qualification review. Is the contractor responsible for actual recruitment and selection of committee members? If so, is the contractor then also responsible for conducting the training and monitoring the quality of work of selected committee members?

**Answer:** The contractor is responsible for actual recruitment and recommending potential committee membership. The contractor is not responsible for conducting the training and monitoring of the quality of work of selected committee members.

<b>Section C</b>	<b>PROPOSAL CONTENTS</b> <b>A. Project Approach/Methodology</b> <b>Part 3 Tasks, bullet 1</b>	<b>pg. 23</b>
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Q16. Over what time period and for how many events will the recruiting, recommending, and notifying process be necessary?

**Answer:** The time period is the duration of the contract. These processes will be necessary to establish membership in the described review committees that will serve for all aspect of item/task development through the provision of items/tasks for field testing.

<b>Section C</b>	<b>PROPOSAL CONTENTS</b> <b>A. Project Approach/Methodology</b> <b>Part 3 Tasks (continued), bullet 1, bullet 9, bullet 11</b>	<b>pg. 24</b>
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Q17. What type of item review interface (e.g., hardcopy based on binders of item cards; electronic item review where the facilitator presents items and real-time edits are made before the committee; committee members individually access and review items electronically and provide feedback and/or rating via the electronic system) is planned by the SBAC? The type of system used will have a significant impact on the design of response capture strategies.

**Answer:** SMARTER Balanced is seeking a web-based Item Authoring and Item Pool Application to support the committee review process. The application shall support one facilitator and multiple members for each committee. Committees will be able meet simultaneously.

Committee members shall be able to preview each of the items in their work queue and provide feedback. They will also be able to make a recommendation to accept, reject, or revise, and provide suggestions for revision, but they may not edit the item. Committee members may only view their own comments and feedback.

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- Q18. Does the SBAC prefer a consensus process, a voting/majority rules process, or a third-party process for resolving conflicting opinions/recommendations from committees and/or committee members?  
**Answer:** Vendor will work with SBAC to develop protocols for how review committee feedback will be captured, how final recommendations will be determined, and how SBAC will handle feedback. SMARTER Balanced’s preference is for consensus, but the Consortium recognizes this may not be the most efficient process for use in this work effort.
- Q19. Is the contractor expected to present a plan for developing these criteria and processes, OR is the contractor expected to develop an operational system that performs these functions?  
**Answer:** The vendor is expected to present a plan for developing these criteria and processes; the contractor is expected to develop the plan.
- Q20. Please define “review outcomes.”  
**Answer:** This is an actionable item for the item development contractor(s) to respond to, and deals with how comments from review committees (e.g., accept, accept with changes, reject with explanation) will be handled by the Consortium.

<b>Section C</b>	<b>PROPOSAL CONTENTS</b>	<b>pg. 30</b>
	<b>Twice Annual Contractor Meetings</b>	

- Q21. Is the sum indicated to cover travel for the contractor’s staff or for SBAC staff, or both?  
**Answer:** Refer to Q3.
- Also, please confirm that we should include a total of \$39,392 for the entire contract period for this travel (not \$39,392 per year or per meeting).  
**Answer:** The total is for the entire contract period.
- Q22. a. Please confirm that the allocation of \$39,392 is for four (two annually) contractor meetings to be held at OSPI in Olympia WA during the contract period.  
**Answer:** Refer to Q3.
- b. For what specific travel costs will the contractor be responsible?  
**Answer:** Refer to Q3.
- c. How many traveling attendees (by role) are expected at each of these meetings?  
**Answer:** Refer to Q3.
- d. Does OSPI/SBAC require any other face-to-face meetings?  
**Answer:** Contractor should propose and cost within provided budget, the number of needed meetings (and formats for each) to fulfill the objectives of the contract.

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<b>Exhibit F</b>	<b>Evaluation Criteria</b> <b>Part 2 (L1; 10) Develop Item/Task Writing Training Materials</b> <b>Criteria bullet 12, 13 and 14</b>	<b>pg. 57</b>
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- Q23. “Proposal presents a plan for developing an on-line delivery system for item/task/stimulus writer training.”
- Is the contractor expected to develop a blueprint and/or requirements for a system that delivers item/task/stimulus writer training OR is the contractor expected to develop an operational on-line training delivery system?
- Answer:** Refer to Q12.
- Q24. “Proposal presents a plan for developing writer qualification and quality control procedures.”
- Is the contractor expected to develop a blueprint and/or requirements for a system that captures and evaluates item writer qualifications and which monitors quality control OR is the contractor expected to develop an operational system that performs these functions?
- Answer:** Refer to Q12.
- Q25. “Proposal presents a plan for developing guidelines for capturing and communicating information that will inform ongoing improvement of item/task/scenario specifications.”
- Is the contractor expected to present a plan for developing such guidelines, OR is the contractor expected to develop an operational system that performs these functions?
- Answer:** Refer to Q13.

<b>Exhibit F</b>	<b>Evaluation Criteria</b> <b>Part 3 (L1: 17) Develop Content, Accessibility, and Bias/Sensitivity Item and Task</b> <b>Review Materials, bullet 3</b>	<b>pg. 58</b>
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- Q26. Please clarify the parenthetical comment “training delivery occurs as part of meeting scope” since training delivery is not part of this RFP?
- Answer:** The parenthetical comment “training delivery occurs as part of meeting scope” in bullet 3 on pg. 58 should be deleted. It does not apply.