



State of West Virginia
Department of Administration
Purchasing Division
2019 Washington Street East
Post Office Box 50130
Charleston, WV 25305-0130

Request for Quotation

RFQ NUMBER

EDD288492

PAGE

1

ADDRESS CORRESPONDENCE TO ATTENTION OF

SHELLY MURRAY
304-558-8801

*904112015 608-238-0644

WEBB NORMAN L
3913 PRISCILLA LANE

MADISON WI 53705

DEPARTMENT OF EDUCATION

BUILDING 6
1900 KANAWHA BOULEVARD, EAST
CHARLESTON, WV
25305-0330

VENDOR

SHIP TO

DATE PRINTED

02/27/2008

TERMS OF SALE

SHIP VIA

F.O.B.

FREIGHT TERMS

BID OPENING DATE:

03/25/2008

BID OPENING TIME

01:30PM

LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
REQUEST FOR QUOTATION						
THE PURCHASING DIVISION IS SOLICITING BIDS FOR THE WV DEPARTMENT OF EDUCATION TO PROVIDE A PRE-FIELD TEST AND A POST-FIELD TEST ALIGNMENT STUDY OF THE 21ST CENTURY WEST VIRGINIA CONTENT STANDARDS AND OBJECTIVES AND THE WEST VIRGINIA EDUCATIONAL STANDARDS TEST 2 (WESTEST 2) ASSESSMENTS.						
ATTACHMENTS: SPECIFICATIONS PURCHASING AFFIDAVIT						
INQUIRES: WRITTEN QUESTIONS SHALL BE ACCEPTED THROUGH CLOSE OF BUSINESS ON 03/12/2008. QUESTIONS MAY BE SENT VIA USPS, FAX, COURIER, OR EMAIL. IN ORDER TO ASSURE NO VENDOR RECEIVES AN UNFAIR ADVANTAGE, NO SUBSTANTIVE QUESTIONS WILL BE ANSWERED ORALLY. IF POSSIBLE, EMAIL QUESTIONS ARE PREFERRED. ADDRESS INQUIRES TO: SHELLY MURRAY DEPARTMENT OF ADMINISTRATION PURCHASING DIVISION 2019 WASHINGTON STREET, EAST CHARLESTON, WV 25311 FAX: 304-558-4115 EMAIL: SHELLY.L.MURRAY@WV.GOV						
0001	1	EA		924-20		
EXAMINATION AND TESTING SERVICES (EDUCATIONAL)						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE

TELEPHONE

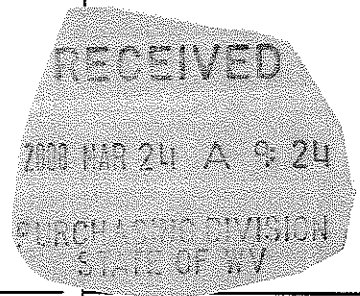
DATE

TITLE

FEIN

ADDRESS CHANGES TO BE NOTED ABOVE

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EXHIBIT 3						
LIFE OF CONTRACT: THIS CONTRACT BECOMES EFFECTIVE UPON AWARD AND EXTENDS FOR A PERIOD OF ONE (1) YEAR OR UNTIL SUCH "REASONABLE TIME" THEREAFTER AS IS NECESSARY TO OBTAIN A NEW CONTRACT OR RENEW THE ORIGINAL CONTRACT. THE "REASONABLE TIME" PERIOD SHALL NOT EXCEED TWELVE (12) MONTHS. DURING THIS "REASONABLE TIME" THE VENDOR MAY TERMINATE THIS CONTRACT FOR ANY REASON UPON GIVING THE DIRECTOR OF PURCHASING 30 DAYS WRITTEN NOTICE.						
UNLESS SPECIFIC PROVISIONS ARE STIPULATED ELSEWHERE IN THIS CONTRACT DOCUMENT, THE TERMS, CONDITIONS AND PRICING SET HEREIN ARE FIRM FOR THE LIFE OF THE CONTRACT.						
RENEWAL: THIS CONTRACT MAY BE RENEWED UPON THE MUTUAL WRITTEN CONSENT OF THE SPENDING UNIT AND VENDOR, SUBMITTED TO THE DIRECTOR OF PURCHASING THIRTY (30) DAYS PRIOR TO THE EXPIRATION DATE. SUCH RENEWAL SHALL BE IN ACCORDANCE WITH THE TERMS AND CONDITIONS OF THE ORIGINAL CONTRACT AND SHALL BE LIMITED TO TWO (2) ONE (1) YEAR PERIODS.						
CANCELLATION: THE DIRECTOR OF PURCHASING RESERVES THE RIGHT TO CANCEL THIS CONTRACT IMMEDIATELY UPON WRITTEN NOTICE TO THE VENDOR IF THE COMMODITIES AND/OR SERVICES SUPPLIED ARE OF AN INFERIOR QUALITY OR DO NOT CONFORM TO THE SPECIFICATIONS OF THE BID AND CONTRACT HEREIN.						
OPEN MARKET CLAUSE: THE DIRECTOR OF PURCHASING MAY AUTHORIZE A SPENDING UNIT TO PURCHASE ON THE OPEN MARKET, WITHOUT THE FILING OF A REQUISITION OR COST ESTIMATE, ITEMS SPECIFIED ON THIS CONTRACT FOR IMMEDIATE DELIVERY IN EMERGENCIES DUE TO UNFORESEEN						
SEE REVERSE SIDE FOR TERMS AND CONDITIONS						
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<p>CAUSES (INCLUDING BUT NOT LIMITED TO DELAYS IN TRANSPORTATION OR AN UNANTICIPATED INCREASE IN THE VOLUME OF WORK.)</p> <p>BANKRUPTCY: IN THE EVENT THE VENDOR/CONTRACTOR FILES FOR BANKRUPTCY PROTECTION, THIS CONTRACT IS AUTOMATICALLY NULL AND VOID, AND IS TERMINATED WITHOUT FURTHER ORDER.</p> <p>THE TERMS AND CONDITIONS CONTAINED IN THIS CONTRACT SHALL SUPERSEDE ANY AND ALL SUBSEQUENT TERMS AND CONDITIONS WHICH MAY APPEAR ON ANY ATTACHED PRINTED DOCUMENTS SUCH AS PRICE LISTS, ORDER FORMS, SALES AGREEMENTS OR MAINTENANCE AGREEMENTS, INCLUDING ANY ELECTRONIC MEDIUM SUCH AS CD-ROM.</p> <p>REV. 04/11/2001</p> <p>EXHIBIT 6</p> <p>PRICE ADJUSTMENT PROVISION: THE STATE OF WEST VIRGINIA WILL CONSIDER BIDS THAT CONTAIN PROVISIONS FOR PRICE ADJUSTMENTS PRIOR TO THE ORIGINAL EXPIRATION OF THE CONTRACT, PROVIDED THAT SUCH PRICE ADJUSTMENT COVERS BOTH UPWARD AND DOWNWARD MOVEMENT OF THE COMMODITY PRICE, AND THAT ADJUSTMENT IS BASED ON THE "PASS THROUGH" INCREASE OR DECREASE OF RAW MATERIALS AND/OR LABOR, WHICH MAKE UP ALL OR A SUBSTANTIAL PART OF A PRODUCT. ADJUSTMENTS ARE TO BE BASED UPON AN ACTUAL DOLLAR FIGURE, NOT A PERCENTAGE. ALL PRICE ADJUSTMENT REQUESTS MUST BE SUBSTANTIATED IN A MANNER ACCEPTABLE TO THE DIRECTOR PURCHASING, E.G. GOVERNMENTAL BENCH MARKS, GENERAL MARKET INCREASE, PUBLISHED PRICE LISTS. SUCH REQUESTS FOR AND INCREASE SHOULD BE RECEIVED IN WRITING BY THE DIRECTOR OF</p>						

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<p>PURCHASING AT LEAST 30 DAYS IN ADVANCE OF THE EFFECTIVE DATE OF THE INCREASE. ANY TIME THE VENDOR REQUESTS A PRICE ADJUSTMENT, THE PURCHASING DIVISION MAY EITHER ACCEPT THE PRICE ADJUSTMENT AND AMEND THE CONTRACT ACCORDINGLY OR REJECT THE ADJUSTMENT IN ITS ENTIRETY AND CANCEL THE CONTRACT.</p> <p>PREFERRED TERMS: IT IS PREFERRED THAT THE PRICES ON THIS CONTRACT ARE FIRM FOR LIFE OF THE CONTRACT, AS INDICATED IN THE LIFE OF CONTRACT CLAUSE CONTAINED HEREIN, NOT TO EXCEED ONE (1) YEAR AND PRICE INCREASES WILL BE CONSIDERED AT TIME OF RENEWAL ONLY.</p> <p>VENDOR PREFERENCE CERTIFICATE</p> <p>CERTIFICATION AND APPLICATION* IS HEREBY MADE FOR PREFERENCE IN ACCORDANCE WITH WEST VIRGINIA CODE, 5A-3-37 (DOES NOT APPLY TO CONSTRUCTION CONTRACTS).</p> <p>A. APPLICATION IS MADE FOR 2.5% PREFERENCE FOR THE REASON CHECKED:</p> <p>() BIDDER IS AN INDIVIDUAL RESIDENT VENDOR AND HAS RESIDED CONTINUOUSLY IN WEST VIRGINIA FOR FOUR (4) YEARS IMMEDIATELY PRECEDING THE DATE OF THIS CERTIFICATION; OR</p> <p>() BIDDER IS A PARTNERSHIP, ASSOCIATION OR CORPORATION RESIDENT VENDOR AND HAS MAINTAINED ITS HEAD-QUARTERS OR PRINCIPAL PLACE OF BUSINESS CONTINUOUSLY IN WEST VIRGINIA FOR FOUR (4) YEARS IMMEDIATELY PRECEDING THE DATE OF THIS CERTIFICATION; OR 80% OF THE OWNERSHIP INTEREST OF BIDDER IS HELD BY ANOTHER INDIVIDUAL, PARTNERSHIP, ASSOCIATION OR CORPORATION RESIDENT VENDOR</p>						
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WHO HAS MAINTAINED ITS HEADQUARTERS OR PRINCIPAL PLACE OF BUSINESS CONTINUOUSLY IN WEST VIRGINIA FOR FOUR (4) YEARS IMMEDIATELY PRECEDING THE DATE OF THIS CERTIFICATION; OR						
() BIDDER IS A CORPORATION NONRESIDENT VENDOR WHICH HAS AN AFFILIATE OR SUBSIDIARY WHICH EMPLOYS A MINIMUM OF ONE HUNDRED STATE RESIDENTS AND WHICH HAS MAINTAINED ITS HEADQUARTERS OR PRINCIPAL PLACE OF BUSINESS WITHIN WEST VIRGINIA CONTINUOUSLY FOR THE FOUR (4) YEARS IMMEDIATELY PRECEDING THE DATE OF THIS CERTIFICATION.						
B. APPLICATION IS MADE FOR 2.5% PREFERENCE FOR THE REASON CHECKED:						
() BIDDER IS A RESIDENT VENDOR WHO CERTIFIES THAT, DURING THE LIFE OF THE CONTRACT, ON AVERAGE AT LEAST 75% OF THE EMPLOYEES WORKING ON THE PROJECT BEING BID ARE RESIDENTS OF WEST VIRGINIA WHO HAVE RESIDED IN THE STATE CONTINUOUSLY FOR THE TWO YEARS IMMEDIATELY PRECEDING SUBMISSION OF THIS BID;						
OR						
() BIDDER IS A NONRESIDENT VENDOR EMPLOYING A MINIMUM OF ONE HUNDRED STATE RESIDENTS OR IS A NONRESIDENT VENDOR WITH AN AFFILIATE OR SUBSIDIARY WHICH MAINTAINS ITS HEADQUARTERS OR PRINCIPAL PLACE OF BUSINESS WITHIN WEST VIRGINIA EMPLOYING A MINIMUM OF ONE HUNDRED STATE RESIDENTS WHO CERTIFIES THAT, DURING THE LIFE OF THE CONTRACT, ON AVERAGE AT LEAST 75% OF THE EMPLOYEES OR BIDDERS' AFFILIATE'S OR SUBSIDIARY'S EMPLOYEES ARE RESIDENTS OF WEST VIRGINIA WHO HAVE RESIDED IN THE STATE CONTINUOUSLY FOR THE TWO YEARS IMMEDIATELY PRECEDING SUBMISSION OF THIS BID.						
BIDDER UNDERSTANDS IF THE SECRETARY OF TAX & REVENUE						

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*904112015 608-238-0644

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MADISON WI 53705

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VENDOR

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<p>DETERMINES THAT A BIDDER RECEIVING PREFERENCE HAS FAILED TO CONTINUE TO MEET THE REQUIREMENTS FOR SUCH PREFERENCE, THE SECRETARY MAY ORDER THE DIRECTOR OF PURCHASING TO: (A) RESCIND THE CONTRACT OR PURCHASE ORDER ISSUED; OR (B) ASSESS A PENALTY AGAINST SUCH BIDDER IN AN AMOUNT NOT TO EXCEED 5% OF THE BID AMOUNT AND THAT SUCH PENALTY WILL BE PAID TO THE CONTRACTING AGENCY OR DEDUCTED FROM ANY UNPAID BALANCE ON THE CONTRACT OR PURCHASE ORDER.</p> <p>BY SUBMISSION OF THIS CERTIFICATE, BIDDER AGREES TO DISCLOSE ANY REASONABLY REQUESTED INFORMATION TO THE PURCHASING DIVISION AND AUTHORIZES THE DEPARTMENT OF TAX AND REVENUE TO DISCLOSE TO THE DIRECTOR OF PURCHASING APPROPRIATE INFORMATION VERIFYING THAT BIDDER HAS PAID THE REQUIRED BUSINESS TAXES, PROVIDED THAT SUCH INFORMATION DOES NOT CONTAIN THE AMOUNTS OF TAXES PAID NOR ANY OTHER INFORMATION DEEMED BY THE TAX COMMISSIONER TO BE CONFIDENTIAL.</p> <p>UNDER PENALTY OF LAW FOR FALSE SWEARING (WEST VIRGINIA CODE 61-5-3), BIDDER HEREBY CERTIFIES THAT THIS CERTIFICATE IS TRUE AND ACCURATE IN ALL RESPECTS; AND THAT IF A CONTRACT IS ISSUED TO BIDDER AND IF ANYTHING CONTAINED WITHIN THIS CERTIFICATE CHANGES DURING THE TERM OF THE CONTRACT, BIDDER WILL NOTIFY THE PURCHASING DIVISION IN WRITING IMMEDIATELY.</p> <p>BIDDER: <u>Norman L. Webb</u></p> <p>DATE: <u>March 20, 2008</u></p> <p>SIGNED: <u>[Signature]</u></p>						

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<p>TITLE: <i>Private Consultant</i></p> <p>* CHECK ANY COMBINATION OF PREFERENCE CONSIDERATION(S) IN EITHER "A" OR "B", OR BOTH "A" AND "B" WHICH YOU ARE ENTITLED TO RECEIVE. YOU MAY REQUEST UP TO THE MAXIMUM 5% PREFERENCE FOR BOTH "A" AND "B". (REV. 12/00)</p> <p>NOTICE</p> <p>A SIGNED BID MUST BE SUBMITTED TO:</p> <p>DEPARTMENT OF ADMINISTRATION PURCHASING DIVISION BUILDING 15 2019 WASHINGTON STREET, EAST CHARLESTON, WV 25305-0130</p> <p>THE BID SHOULD CONTAIN THIS INFORMATION ON THE FACE OF THE ENVELOPE OR THE BID MAY NOT BE CONSIDERED:</p> <p>SEALED BID</p> <p>BUYER: SHELLY MURRAY/FILE 31</p> <p>RFQ. NO.: EDD288492</p> <p>BID OPENING DATE: 03/25/2008</p> <p>BID OPENING TIME: 01:30 PM</p>						
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LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
PLEASE PROVIDE A FAX NUMBER IN CASE IT IS NECESSARY TO CONTACT YOU REGARDING YOUR BID: ----- 608-265-5310 -----						
CONTACT PERSON (PLEASE PRINT CLEARLY): ----- Norman L. Webb -----						
***** THIS IS THE END OF RFQ EDD288492 ***** TOTAL:						\$271,950-
SEE REVERSE SIDE FOR TERMS AND CONDITIONS						
SIGNATURE		TELEPHONE		DATE		
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PROCUREMENT SPECIFICATIONS

General Requirements:

The purpose of the Request for Quotation (RFQ) is to seek bids from vendors qualified to provide, as per federal requirements, a pre-field test **and** a post-field test alignment study of the 21st Century West Virginia Content Standards and Objectives and the West Virginia Educational Standards Test 2 (WESTEST 2) assessments in three content areas – reading/language arts, mathematics and science for seven grade levels -- grades 3, 4, 5, 6, 7, 8 and 11. The West Virginia Department of Education (WVDE) requires a vendor with a proven record of expertise, capacity and delivery to complete the federal mandate for a high quality alignment study. An unbiased external reviewer must conduct the study.

The external alignment study must address, both quantitatively and qualitatively, the comprehensiveness of tests in terms of gaps and weaknesses, emphasis and depth of knowledge as well as thinking skill distribution to ensure the alignment of content and performance descriptors with the assessment.

WVDE also requests that the vendor provide an item review of the WESTEST 2 Field Test Item bank prior to the development of field test forms. This review would occur immediately upon award of the contract, anticipated no sooner than March 2008. The report would identify item alignment issues and sources of challenge that would prevent the item from being used in the field or operational test forms. The team must include external reviewers with the review being conducted in West Virginia.

I. Scope of the Work (Future Deliverables):

A. Future deliverables which the vendor is required to meet upon reward of the contract include an external alignment of the WESTEST 2 to the 21st Century West Virginia Content Standards and Objectives. The pre-field test alignment is to be conducted in May 2008 **and** the post-field test alignment is to be conducted in November 2008. After award, the successful vendor will be required to develop clearly articulated procedures that address the following criteria:

- a. Linkage of the assessment to the grade level content standards and objectives
- b. Alignment of grade level performance descriptors with the assessment
- c. Show the coverage of assessment to the breadth of the standards
- d. Evaluate the alignment of items and standards complexity – depth of knowledge
- e. Show categorical concurrence of items matching to standards
- f. Cognitive complexity as related to the grade level descriptors
- g. Provide balance of representation of items on the assessment
- h. Established training process and materials for reviewers

B. The study to be developed must provide the following products for both a pre-field test and post-field test alignment study:

- A written summary report that provides results of the analysis of the reading/language arts, mathematics and science alignment for grades 3, 4, 5, 6, 7, 8 and 11
- Explicit identification data detailing whether the standards and assessments are

- aligned or not aligned
- Graphs, tables, charts, as appropriate, to report the analysis for each criterion for each standard within a content area
- Data file summarizing how each reviewer coded each item
- A report on inter-rater (reviewer) reliability
- Recommended action to correct alignment deficiencies

C. Review of the Field Test Item Bank shall provide the following information:

- a. A written summary report that provides results of the analysis of the WESTEST 2 Field Test Item Banks for reading/language arts, mathematics and science for grades 3, 4, 5, 6, 7, 8 and 11 that identifies the content match, level of complexity and sources of challenge, if any, for each item in the field test item bank
- b. Suggested edits that need to be made to identified items to rectify the deficiencies found

The pre-field test *Initial Study Reports* must be completed and submitted to WVDE by June 30, 2008 and the post-field test *Final Study Reports* must be completed and submitted to WVDE by December 31, 2008. The review of the Field Test Item Bank will be conducted in March and the final report is anticipated to be submitted to WVDE by April 15, 2008.

Evaluator Qualifications:

The evaluator must:

- Provide documentation including reports that the vendor has completed three or more state alignment evaluations of state assessments by grade level to the state's content standards and academic achievement descriptors in each of the following content areas: reading/language arts, mathematics and science as per the respective state content standards and descriptors by grade level that were in any Federal Title I Peer Review conducted from February 2005 to date.
- Provide names of reviewers, their content specialization and a list of their work experience in participating in previous pre-field test and post-field test alignment studies and/or a Field Test Item Bank review. Also, provide names of any other staff required and their previous work experience with alignment studies. The vendor's selected reviewers for the project must have previously participated in similar reviews for three statewide or large district alignment studies.

Incurring Costs:

The state and any of its employees or officers shall not be held liable for any expenses incurred by any bidder responding to this RFQ for expenses to prepare, deliver the bid, or to attend any meetings, oral presentations or protest hearings.

Price Quotations:

The price(s) quoted in the bidder's proposal will not be subject to any increase and will be considered firm for the life of the contract.

OPERATING ENVIRONMENT

The West Virginia Department of Education is located in Building 6, 1900 Kanawha Boulevard, East, Charleston, West Virginia 25305.

The RFQ is issued by the Purchasing Division on behalf of the Office of Assessment and Accountability of the West Virginia Department of Education. After award, the contact person for the duration of the contract will be Brenda West, Assistant Director, Office of Assessment and Accountability, who can be reached at (304) 558-2546 and bwest@access.k12.wv.us.

Fixed firm price for the Content and Assessment Alignment Study as described on pages 2 and 3 of this document that includes all deliverables. The pre-field test *Initial Study Reports* are due on June 30, 2008. The post-field test *Final Study Reports* will be due by December 31, 2008. The contract will be in effect for up to one year from the submission. After submission of the *Final Study Reports*, there will be a twelve-month period for any necessary refinement. The *Final Study Reports* will be issued after the additional review is completed. The review of the Field Test Item Bank will be conducted in March and the *Final Item Bank Review Report* is anticipated to be submitted to WVDE by April 15, 2008

The projected costs for the **Pre-field Test and Post-Field Test** alignment studies for the three content areas area as follows:

Honorarium for reviewers and consultant	\$ <u>104,600</u>
Preparations for the study	\$ <u>2,880</u>
Data analysis and report writing	\$ <u>12,600</u>
Meeting Expenses	\$ <u>22,190</u>
Travel (to included lodging) for reviewers	\$ <u>40,930</u>
Normals, including printing, mailing	\$ <u>700</u>
Subtotal (for pre and post alignment studies)	\$ <u>183,900</u>

The projected costs for **Review of the Field Test Item Bank** for the three content areas are as follows:

Honorarium for reviewers and consultant	\$ <u>48,400</u>
Preparations for the study	\$ <u>1,440</u>
Data analysis and report writing	\$ <u>6,300</u>
Meeting Expenses	\$ <u>11,095</u>
Travel (to included lodging) for reviewers	\$ <u>20,465</u>
Normals, including printing, mailing	\$ <u>350</u>
Subtotal (for Review of Field Test Item Bank)	\$ <u>88,050</u>

Cost shall be all-inclusive. No separate reimbursement will be made for any travel, overhead or

Incidental expenses

The box provided for the Total Quotation Cost requires the bidder to certify, by authorized signature, that what is being bid is deliverable and the prices are correct as of the date of this proposal and will remain the same for the life of the contract.

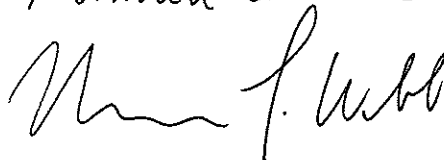
(Payment upon delivery and subsequent Invoices from vendor)

TOTAL QUOTATION COST

The total, not-to exceed cost, for this quotation is:

Pre-field Test and Post-field Test	<u>\$183,900</u>
Review of Field Test Item Bank	<u>\$ 88,050</u>
TOTAL	<u>\$271,950</u>

Norman L. Webb



Private Contractor

March 21, 2008

STATE OF WEST VIRGINIA
Purchasing Division

PURCHASING AFFIDAVIT

West Virginia Code §5A-3-10a states: No contract or renewal of any contract may be awarded by the state or any of its political subdivisions to any vendor or prospective vendor when the vendor or prospective vendor or a related party to the vendor or prospective vendor is a debtor and the debt owed is an amount greater than one thousand dollars in the aggregate

DEFINITIONS:

"Debt" means any assessment, premium, penalty, fine, tax or other amount of money owed to the state or any of its political subdivisions because of a judgment, fine, permit violation, license assessment, defaulted workers' compensation premium, penalty or other assessment presently delinquent or due and required to be paid to the state or any of its political subdivisions, including any interest or additional penalties accrued thereon.

"Debtor" means any individual, corporation, partnership, association, limited liability company or any other form or business association owing a debt to the state or any of its political subdivisions. "Political subdivision" means any county commission; municipality; county board of education; any instrumentality established by a county or municipality; any separate corporation or instrumentality established by one or more counties or municipalities, as permitted by law; or any public body charged by law with the performance of a government function or whose jurisdiction is coextensive with one or more counties or municipalities. "Related party" means a party, whether an individual, corporation, partnership, association, limited liability company or any other form or business association or other entity whatsoever, related to any vendor by blood, marriage, ownership or contract through which the party has a relationship of ownership or other interest with the vendor so that the party will actually or by effect receive or control a portion of the benefit, profit or other consideration from performance of a vendor contract with the party receiving an amount that meets or exceeds five percent of the total contract amount.

EXCEPTION: The prohibition of this section does not apply where a vendor has contested any tax administered pursuant to chapter eleven of this code, workers' compensation premium, permit fee or environmental fee or assessment and the matter has not become final or where the vendor has entered into a payment plan or agreement and the vendor is not in default of any of the provisions of such plan or agreement.

LICENSING: Vendors must be licensed and in good standing in accordance with any and all state and local laws and requirements by any state or local agency of West Virginia, including, but not limited to, the West Virginia Secretary of State's Office, the West Virginia Tax Department, West Virginia Insurance Commission, or any other state agencies or political subdivision. Furthermore, the vendor must provide all necessary releases to obtain information to enable the Director or spending unit to verify that the vendor is licensed and in good standing with the above entities.

CONFIDENTIALITY: The vendor agrees that he or she will not disclose to anyone, directly or indirectly, any such personally identifiable information or other confidential information gained from the agency, unless the individual who is the subject of the information consents to the disclosure in writing or the disclosure is made pursuant to the agency's policies, procedures and rules. Vendors should visit www.state.wv.us/admin/purchase/privacy for the Notice of Agency Confidentiality Policies.

Under penalty of law for false swearing (West Virginia Code, §61-5-3), it is hereby certified that the vendor acknowledges the information in this said affidavit and are in compliance with the requirements as stated.

Vendor's Name: Norman L. Webb

Authorized Signature: [Signature] Date: March 20, 2008

Proposal to Conduct Three Alignment Studies to Determine the Alignment between the 21st Century West Virginia Content Standards and Objectives and the West Virginia Educational Standards Test 2 (WESTEST 2) Assessments for Reading/ Language Arts Grades 3-8 and 11, Mathematics Grades 3-8 and 11, and Science Grades 3-8 and 11

**Submitted by Norman L. Webb, A Private Contractor
3913 Priscilla Lane
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March 20, 2008**

Abstract

This is a proposal to conduct three alignment studies of the 21st Century West Virginia content standards and objectives and the West Virginia Educational Standards Test 2 (WESTEST 2) assessments for three content areas—reading/language arts/language arts (grades 3-8 and 11), mathematics (grades 3-8 and 11), and science (grades 3-9 and 11). Three groups—one for language arts, one for mathematics, and one for science—of six reviewers each will conduct a 1) Field Test Item Bank review analysis one month from the contract approval; 2) a Pre-field Test alignment study in the last week of May, and 3) a Post-field Test alignment study in November 2008. Three content experts for each group will be from states other than West Virginia with no connection to West Virginia and three reviewers from West Virginia. The budget for the proposal includes travel and stipends for the external and West Virginia reviewers. The total amount for the three alignment analysis for the work described in this proposal is \$271,950.

Each of the three analyses will be done at a three-day institute conducted in the Charleston, West Virginia. A web-based tool, the Web Alignment Tool (WAT), will be used for reviewers to enter data, for analyzing the data, and for producing data tables. For each study three reports will be produced, one for each content area of language arts, mathematics, and science. Each report will describe for each grade the alignment between West Virginia content standards and the assessment. Four alignment criteria will be used to describe the alignment—categorical concurrence, depth-of-knowledge consistency, range-of-knowledge correspondence, and balance of representation. Four depth-of-knowledge levels will be used to analyze the content complexity for the regular assessment. Information will be reported by assessment items and by the main areas of expectations (standards). The reports will include a commentary on what would be required for each of the assessments to be fully aligned based on the four criteria if the assessments are not considered fully aligned. A fifth criterion, source-of-challenge, will also be used and reported. Reviewers will identify any item with a misplaced challenge such as an unfair bias for a subgroup, an acceptable answer or content requirement other than the targeted standard/objective, or poor item construction.

SCOPE OF WORK AND DELIVERABLES

1. In Scope

An alignment process developed by the contractor, Norman L. Webb, will be used in this analysis. This process has been used to analyze curriculum standards and assessments in over 25 states to meet or to prepare to meet the Title I compliance as required by the United States Department of Education (USDE). Three of the first four states that have met the USDE requirements used the process to evaluate alignment of their standards and assessments. It should be noted, however, that compliance is an agreement between the state and the United States Department of Education and the acceptance of the process has to be agreed upon by these two agencies and cannot be guaranteed by the contractor.

Trained teams of reviewers will conduct the alignment analysis, teams of six reviewers for each content area (reading/language arts, mathematics, and science). Six reviewers rather than eight will produce reasonable reliability of results while reducing costs. These reviewers, knowledgeable content area experts, will use a web-based software called the Web Alignment Tool (WAT) (<http://www.wcer.wisc.edu/wat>) developed under the direction of Norman Webb at the Wisconsin Center for Education Research in cooperation with the Council of Chief School Officers (CCSSO) and funded by the National Science Foundation and the United States Department of Education.

The team of reviewers in each content area for each study will analyze the alignment of the West Virginia's standards and WESTEST 2 assessments or items from the item bank. The West Virginia standards will be entered into the WAT. The team of reviewers will reach consensus on the depth-of-knowledge level for each objective under the state standards.

Then the team of reviewers will use the WAT to code items in the item bank for the Item Bank Review and one form for each grade of the assessment for the Pre-field Test and Post-field Test reviews. Findings for each content area will be reported on four alignment criteria along with source-of-challenge issues and other notes. Detailed information will be provided electronically for each item and each state standard. This information will allow state officials to judge the acceptability of individual items on the assessments and the coverage at the grade level of expectations.

For each study, one written report will be prepared for each content area (language arts, mathematics, and science) for a total of nine reports. For the Item Bank Review, the reports will describe the distribution of items by content standards, objectives, and DOK levels. Items with source-of-challenge issues will be identified along with any other issues. The number of potential assessment forms aligned with the WV standards and objectives will be described.

For the Pre-field Test and Post-field Test studies, the reports will describe the overall alignment of each assessment form with the West Virginia content standards. The

overall alignment will be reported as acceptable, needs improvement, or unacceptable. Each content area report will include a section for each assessment describing in some detail what changes are needed to improve the alignment. Although information on needed changes will not be reported item by item (information on this will be included in the appendices), tables will be included that will report what standards reviewers coded to each item. A sample report can be provided. The tables that will be included for each assessment for each content area include:

- Summary of results for each of the four alignment criteria
- Comments made by reviewers on items identified as having a source of challenge issue by item number.
- The depth-of-knowledge level (DOK) value for each assessment item given by each reviewer. The intraclass correlation for the group of reviewers is given on the last row.
- All notes made by reviewers on items by item number.
- The DOK level and objective code assigned by each reviewer for each item.
- Standards coded to each item by reviewer.
- Items coded by reviewers for each standard.
- Number of reviewers coding an item by standard.

Preliminary findings and data tables can be submitted to West Virginia Department of Education (WVDE) within two weeks following an institute. Reports will be submitted one month after the institute.

2. Technical Environment

Content area expert reviewers will analyze the West Virginia content standards and the assessments using the definitions of four Depth-of-Knowledge (DOK) levels for the regular assessment. A sample of the DOK definitions for language arts is attached.

Pre-field Test and Post-field Test

For the Pre-field Test and Post-field Test studies, the content standards and each assessment form will be compared using four alignment criteria:

- *Categorical Concurrence*. The criterion of categorical concurrence between standards and assessment is met if the same or consistent categories of content appear in both documents.
- *Depth-of-Knowledge Consistency*. Depth-of-knowledge consistency (using the DOK) between standards and assessment indicates alignment if what is elicited from students on the assessment is as demanding cognitively as what students are expected to know and do as stated in the standards.
- *Range-of-Knowledge Correspondence*. The range-of-knowledge criterion is used to judge whether a comparable span of knowledge expected of students by a standard is the same as, or corresponds to, the span of knowledge that students need in order to correctly answer the assessment items/activities.

- *Balance of Representation.* The balance-of-representation criterion is used to indicate the degree to which one indicator is given more emphasis on the assessment than another.

Field Test Item Bank

For the Field Test Item Bank review, the distribution of the items by standard/objective and DOK level will be reported. The four above alignment criteria will be used to report on the number of possible distinct forms that could be created from the items in the item bank that would be aligned and have an acceptable level for each criterion. The budget is based on the assumption that the item bank has 100 items for each grade for each content area. If there will be more items, then reviewers will be divided into smaller groups of two or three reviewers in order to analyze all of the items. Smaller groups will only be used after reviewers have been trained and demonstrate they all have a common understanding of the procedures, standards, and DOK levels.

Acceptable Levels for Each Criterion

Results from each analysis will be reported on the four alignment criteria. An acceptable level has been identified for each of these four criteria. State staff will be asked to review the acceptable levels for each of four alignment criteria and to make modifications if warranted. Acceptable levels that have been used are:

- *Categorical Concurrence:* The assessment has at least six items measuring content from a standard.
- *Depth-of-Knowledge Consistency:* At least 50% of the assessment items corresponding to indicators within a standard are at or above the depth-of-knowledge level of the corresponding indicators.
- *Range-of-Knowledge Correspondence:* A least 50% of the indicators for a standard have at least one related assessment item.
- *Balance of Representation:* An index value of .7 or higher is obtained on an index, based on the difference in the proportion of indicators and the proportion of items corresponding to the indicator.

Any source-of-challenge issues (whether the primary difficulty of the assessment items is significantly related to students' knowledge and skill in the content area as represented in the standards) with assessment items will also be reported.

3. Work and Deliverables

Data for the three studies for the three content areas will be collected at three-day institutes held in Charleston, West Virginia.

Field Test Item Bank Review

Within one month after approval of the contact or the end of April 2008 which ever is the earliest. (Given that the proposals will not be opened until March 25, producing a

report by April 15 is unrealistic. The work will be done as soon as possible.)

Pre-field Test Study
Post-field Test Study

Last week in May 2008 (e.g. 28, 29, 30)
In November 2008 at a mutually agreed upon time.

The budget has been developed for the Pre-field Test and Post-field Test studies that one assessment form will be analyzed for each grade for language arts, mathematics, and science. The budget for the Field Test Item Bank review assumes that there will be 100 items per grade. Generally about one half day is required for training and one day for three tests. Reviewers will be required to sign a confidentiality form and not to disclose any information about any assessment items for test security.

At all three institutes reviewers will be trained in the alignment-analysis coding scheme. An experienced person knowledgeable of the alignment analysis process will lead each group and train the reviewers.

Standards and Assessments

In preparation for the alignment study, West Virginia officials, testing company representatives, and Norman Webb will identify the state content standards, objectives, and the assessment items and forms that will be included in the analysis. This will be done by conference calls and email exchanges between Norman Webb and department officials. To be assured there is complete understanding between all parties, consultation on what materials should be included in the analysis is helpful. Identifying the content area objectives and standards and assessments may require some deliberation to assure a full understanding of how the state intends to use the standards and assessments. For example, some states may not expect the state-administered assessments to measure students' knowledge of all of the standards or expectations because teachers are expected to assess students' attainment of some of the standards in their classrooms (e.g. listening in language arts). Once there is a clear understanding as to what content standards, objectives, and assessments are to be included in the analyses; the contractor will enter or verify the standards that have been already entered into the Web Alignment Tool for each content area.

Logistics

The state officials and the testing company representatives are to arrange to have enough assessments at the institute, at least one for each content area reviewer. The items in the item bank for the Field Test Item Bank review will need to have a sequence number, page number, or some form of an identification number. If possible, the items in the item bank should be grouped into packets of 30 or 40 items for ease of handling. Only the item stem and choices or the item prompt and answer location for a constructed response should be included for each item. Any other information that sometimes

accompanies items in an item bank, such as targeted objective or standard, assigned DOK level, or estimated difficulty level should be removed.

For all three studies, it is helpful to have other materials including any scoring guides and answer keys. The science reviewers particularly benefit from having an answer key. The state officials will be expected to provide the contractor prior to the analyses information on the items and assessments including the number of items, the number of items on each assessment, the point value assigned to each item, and any items that would not count towards a student's score or other items on each assessment that should be excluded from the analysis. The contractor needs to be sure he understands the full coverage of the assessments including point values assigned to items, the number of items for each assessment, and scoring guide information. This information will be entered into the WAT prior to the institute. No field test items should be included in the analysis for the Post-field test analysis.

The three-day alignment institutes will require a computer facility with a sufficient number of computers ($N=18$) so that each reviewer has one computer connected to the Internet. The budget is based on the contractor assuming all costs associated with renting rooms and computers. The contractor will work with WVDE staff to locate and arrange to have an appropriate facility including a hotel, community college, school, or some other venue. The facility preferably will include at least three rooms for training and discussion by content area. A large area for the full group to meet is requested for the opening training on the first morning only. Then three breakout rooms are required, one for each group, for discussion of the standards. The breakout rooms could be the computer rooms if they are separate rooms. It is expected that WVDE staff will work with the contractor to arrange for an appropriate facility and for an adequate number of computers to conduct the alignment institute. All of the computers will need to be connected to the Internet. There should be access to a printer.

Operation of Alignment Institute

Each alignment institute will begin with Norman Webb explaining the analysis process and the products of the analysis. Particular circumstances associated with the state should be discussed with Norman Webb prior to the institute. These include, but are not limited to, such issues as whether each assessment form is to be administered only once, whether a different set of standards and objectives are to be measured by the assessments over a specified number of years, or if assessments results are to be used in specific ways. Decisions regarding these issues may require some modifications in the coding procedures.

Next, after obtaining an overview of the alignment process, reviewers will be trained on the process and the DOK levels. Specialists in each content area will be trained separately. Agreement among reviewers will be checked during the training. It should be noted that six reviewers is a reasonable number of reviewers to achieve adequate intraclass correlations in assigning DOK levels to items with appropriate training. Exact agreement is desirable, but not necessary since results will be averaged among the total

number of reviewers. Training will include reviewing sample standards and assessment items and deciding on what DOK level will be assigned to each. The contractor will provide enough copies of training materials so that each reviewer will have a description of the DOK levels and example of assessment items and standards by level. The overall review of the process and training should require about two hours.

For each study, three teams of reviewers, each team with a trained leader, will be responsible for coding the DOK level of an assessment item for each grade level and then assigning the item to a specific objective or standard. Even though the West Virginia content standards may not be necessarily exhaustive, the analysis will code items to objectives and a generic objective (all other content under a standard not addressed by listed objectives) under each state standard. This will help to determine if assessment items measure some range of content.

The process will begin with each content area team members individually assigning a DOK level to each objective under each goal and standard by grade. The group of reviewers will reach consensus on the DOK level of each objective. The consensus DOK value for each indicator will be used to compare with the DOK levels of assessment items. At this time, reviewers will discuss what is incorporated into each standard and objective and what students are expected to know and to do. The consensus process for the Field Test Item Bank analysis will be circumvented because of time.

Next, reviewers will independently review each assessment item and assign a DOK level to the item. Each reviewer will then code the objective he or she feels the item is measuring, i.e., what students are expected to know or do. Up to three objectives can be coded as corresponding to (or hitting) each item. Reviewers will be asked to identify any item with a source-of-challenge problem—an item in which the main challenge in the item is other than knowledge of the content area being tested. They also will be asked to identify any other noticeable deficiency of items and statement of standards. It should be kept in mind, however, that the main purpose of the Pre-field Test and the Post-field Test analyses is less to critique specific items or standards as it is to analyze the alignment between the assessments and the standards. Depending on the length of the assessment, the coding of one assessment and objectives will require about three hours.

Reports and Deliverables

All of the reviewers' codes for an assessment will be entered into the WAT. A specific format for this analysis will be developed. Tables from the WAT for the analyzed content areas will be available within a week or two of the analysis. Summary statistics will be prepared for each of the four criteria—categorical concurrence, depth-of-knowledge consistency, range-of-knowledge correspondence, and balance of representation. Reviewer results will be reported by providing the average percent across state standards that officials agree on for the acceptable level for each criterion.

Deliverables of this contract will include written reports and data delivered electronically. More explicitly, the deliverables for each of three analyses will include:

- Three written reports—one for language arts, one for mathematics, and one for science—reporting the results of the analysis on the four criteria for each assessment;
- Explicit statement if state standards and assessments are aligned or not aligned and what action is needed to make the standards and assessments aligned;
- Tables reporting the analysis for each criterion by state standard within a content area;
- Electronic files summarizing how all of the reviewers coded each item;
- Any other data files as requested by WVDE officials; and
- A report on the reliability among the reviewers for each analysis.

WORK PLAN

Project Plan/Timeline

2008

April 1	Award of Contract
April 28-30	Field Test Item Bank Institute
May 15	Report on the Field Test Item Bank Analysis
May 28-30	Pre-field Test Institute
June 30	Pre-field Test Reports
November 12-14	Post-field Test Institute
December 15	Draft reports for Post-field Test
December 31	Final Post-field test reports

The above days for the alignment institutes are tentative and will have to be mutually agreed upon with the WVDE staff. The location will need to be decided by the WVDE officials. The location has been set for the Charleston area. The contractor is to identify the external reviewers (three) for each of the three groups for each study. The WVDE officials are to identify three content experts from West Virginia for each group. The budget includes stipends and travel expenses for all reviewers including external and West Virginia reviewers.

Norman Webb will talk with state officials and test contractors to review all of the conditions for the study, clarify the standards, gather information on the assessments, and review all of the information to be included in the reports. The contractor is expected to receive from the state most of the necessary information on the content standards, objectives, and assessments. The state is expected to identify the reviewers from West Virginia.

At each three-day alignment institute, each day will be about eight hours of intense work. Preliminary information on the results as presented in the tables will be available within two weeks following the institute. The results will be analyzed and interpreted over the three to four weeks following the institute. Reports of preliminary findings will be prepared on or about one month after the institute, and sent to the

designated state officials. The final reports will be prepared on or before the dates given in the above timeline after receipt of comment from state officials.

Prior to each alignment analysis institute, the WVDE or testing contractor will be expected to provide the following:

1. Three reviewers from West Virginia for each content area
2. West Virginia standards documents (electronic form if available)
3. Any other relevant documents
4. Assessment forms to be analyzed, one copy for each reviewer
5. Assessment administration instructions (if available)
6. Scoring keys, rubrics, and other scoring directions, including sample student work for open-ended items
7. Item statistics, if available
8. Information on the assessments such as number of items, point value for items, any items that should be excluded from the analysis, etc.
9. A non-disclosure form for reviewers to sign

Reports

For each analysis, a written report will be prepared for each language arts, mathematics, and science. These reports will describe the overall alignment of the content standards with each assessment or the potential of alignment for the item bank analysis. The overall alignment will be reported as acceptable, needs improvement, or unacceptable. Each content area report will include a section on each assessment describing in some detail what changes are needed to improve the alignment. Although information on needed changes will not be reported item by item, tables will be included that will report what standards and strands/domains reviewers coded each item. The table of contents for the report will be similar to the following:

Executive Summary

Introduction

Alignment Criteria Used for This Analysis

- Categorical Concurrence

- Depth-of-Knowledge Consistency

- Range-of-Knowledge Correspondence

- Balance of Representation

- Source-of-Challenge Criterion

Findings

- Standards

- Alignment of Curriculum Standards and Assessments

- Source of Challenge

- General Comments Made by Reviewers

- Reliability Among Reviewers

Summary

References

Tables

Two printed copies of each report will be provided if requested along with an electronic copy in Microsoft® Word. Progress reports will be provided as required. The tables that will be included for each assessment for each content area include:

- Summary of results for each of the four alignment criteria
- Comments made by reviewers on items identified as having a source of challenge issue by item number.
- The depth-of-knowledge level (DOK) value for each assessment item given by each reviewer. The intraclass correlation for the group of reviewers is given on the last row.
- All notes made by reviewers on items by item number.
- The DOK level and standard code assigned by each reviewer for each item.
- Standards coded to each item by reviewer
- Items coded by reviewers for each standard
- Number of reviewers coding an item by standard

PROJECT MANAGEMENT

Roles and Responsibilities

Norman L. Webb will direct the alignment studies and oversee the preparation of all of the reports. He will be responsible for identifying and obtaining the participation of all of the 9 external reviewers, three for each review team, for each study. The West Virginia Department of Education is expected to identify the 9 reviewers from West Virginia for each study. All of the reviewers should be experienced and very knowledgeable of the K-12 curriculum in the content area, assessments, and the alignment process. The external reviewers will be identified from content experts and reviewers who have participated in prior analyses. The external reviewers and the internal reviewers will be responsible for doing the actual analyses.

CAPABILITIES AND QUALIFICATIONS OF ORGANIZATION

Norman Webb will do the described work as a private contractor. He has conducted alignment studies for over 25 states or commonwealths and the country of Qatar. Through his work at the Wisconsin Center for Education Research at the

University of Wisconsin he developed in 1997 the procedures to do the alignment study while working on the National Institute for Science Education, funded by the National Science Foundation, and in cooperation with the Council of Chief State School Officers (CCSSO). His work on alignment influenced the specification of alignment criteria by the U.S. Department of Education. Over the past five years, he has conducted alignment studies for the Technical Issues for Large-Scale Assessment (TILSA) collaborative of the CCSSO. Results from his study of the alignment of standards and assessments in four states have been published by CCSSO (Webb, 2003). At the American Educational Research Association annual meeting in 2002, he gave five presentations and papers on alignment including one invited presentation by the Classroom Assessment Special Interest Group. At the most recent AERA annual meeting, he gave another presentation on alignment. In addition to being one of the leading experts on alignment, Dr. Webb does research and evaluation through the Wisconsin Center for Education Research on systemic reform and curriculum. He has worked in the areas of mathematics education, assessment, and evaluation for over 30 years.

Prior Experience

In 2007, he conducted alignment studies for South Dakota, Texas, North Dakota, Illinois, Michigan, Kentucky, West Virginia, Wisconsin, Missouri, and the American Board for Certification of Teacher Excellence. For West Virginia, he completed a two-phase alignment study in language arts/language arts, mathematics and science (June 2003 through April 2004) and more recently an analysis of West Virginia's new assessment for students with disabilities (Feb and April 2006). In 2004-2005, he completed alignment studies in language arts, science, mathematics, and social studies for Delaware; in language arts, mathematics, science, and history for West Virginia (May 2004 through July 2004); in language arts and mathematics for grades 3, 5, and 7 Hawaii (May through June 2004); in language arts and mathematics for grades 4, 6, and 8 Alabama (September 2004 through December 2004); and in language arts and mathematics for the state of Michigan comparing the Michigan Education Assessment Program (MEAP) with the SAT, PSAT, ACT, PLAN, and WorkKeys (November 2004 through January 2005), grades 3-8 MEAP (September 2005), high school Merit Examination and English Language Proficiency (May 2006). In 2005-2006, he has completed or is currently working on an alignment study for the country of Qatar in English, mathematics, science, and Arabic for grades 1-12 (May 2005 through January 2006); Vermont in language arts and mathematics to analyze the state high school standards with the SAT and ACT (June through August 31, 2005); North Carolina for language arts, mathematics, science, and alternate assessments for grades 3-8, and high school (August 2005 through July 2006); and Puerto Rico in Spanish, English as a second language, and mathematics for grades 3-8 and 11 (October 2005 through January 2006). Norman Webb wrote a monograph on alignment for the National Institute for Science Education, with the cooperation of the Council of Chief State School Officers, in 1997. Since then he has worked with the Council of State School Officers and others to refine his alignment process. In 2004 and 2005, he worked with the CCSSO Technical Issues in Large-Scale Assessment collaborative to develop a Web-based tool for analyzing the

alignment of assessments and curriculum standards. This work was funded in part by the U.S. Department of Education and the National Science Foundation.

Norman Webb has conducted alignment studies for states that have received Approval for their assessment systems from the U.S. Department of Education:

West Virginia (ela 3-8, HS, math 3-8 HS, sci 5, 8, HS, Alt)

Tennessee (ela 3-8, HS, math 3-8 HS, sci 5, 8, HS)

North Carolina (ela 3-8, HS, math 3-8 HS, sci 5, 8, HS)

Delaware (ela 3-8, HS, math 3-8 HS, sci 5, 8, HS)

Other states he has conducted alignment studies for that may have received approval, but a current list was not found include:

Alabama (ela 3-8, HS, math 3-8 HS)

Georgia (ela 3-8, HS, math 3-8 HS, sci 5, 8, HS)

Missouri (ela 3-8, HS, math 3-8 HS, sci 5, 8, HS)

Mississippi (ela 3-8, HS, math 3-8 HS, sci 5, 8, HS)

Illinois (ela 3-8, HS, math 3-8 HS, sci 5, 8, HS, Alt)

Kentucky (ela 3-8, HS, math 3-8 HS, sci 5, 8, HS)

Wisconsin (ela 3-8, HS, math 3-8 HS, sci 5, 8, HS, Alt)

Texas (ela 3-8, HS, math 3-8 HS, sci 5, 8, HS, Alt, ESL)

Puerto Rico (ela 3-8, HS, math 3-8 HS)

North Dakota (ela 3-8, HS, math 3-8 HS, sci 5, 8, HS)

South Dakota (ela 3-8, HS, math 3-8 HS, sci 5, 8, HS)

Hawaii (ela 3-8, HS, math 3-8 HS, sci 5, 8, HS)

Michigan (ela 3-8, HS, math 3-8 HS, sci 5, 8, HS, Alt, ESL)

He has done or his staff has done some alignment work for these additional states:

Louisiana

Oklahoma

South Carolina

Maine

Idaho

California

New Mexico

Wyoming

All reports I produced are the property of the funding state. I cannot release a report without proper approval. I would be more than willing to provide copies of any report with the name of the state and other identifying information removed.

COMPENSATION AND PAYMENT

The details of the budget are listed in the cost proposal. The major cost for the analysis is the honoraria and travel expenses for reviewers. The budget also includes the cost for Brian Vesperman, the software engineer who developed the WAT, to provide technical support. If the computer facility is provided, then the total expense can be reduced by the amount for facility rental.

It is requested that half of the total cost for a study be paid on receipt of an invoice directly following the alignment institute. The remainder of the cost for the study should be paid on receipt of an invoice after two reports have been submitted.

References

Webb, N. L. (1997). Criteria for alignment of expectations and assessments in mathematics and science education. Council of Chief State School Officers and National Institute for Science Education Research Monograph No. 6. Madison, WI: University of Wisconsin.

Webb, N. L. (1999). Alignment of science and mathematics standards and assessments in four states. Council of Chief State School Officers and National Institute for Science Education Research Monograph No. 18. Madison, WI: University of Wisconsin.

Webb, N. L. (2003). Alignment study in language arts, mathematics, science, and social studies of state standards and assessments in four states. Washington, D. C.: Council of Chief State School officers.

Appendix

Depth-of-Knowledge Definitions for Language Arts and Writing

Reading/language arts DOK Levels

In language arts, four DOK levels were used to judge both reading/language arts and writing indicators and assessment tasks. The reading/language arts levels are based on Valencia and Wixson (2000, pp. 909-935). The writing levels were developed by Marshá Horton, Sharon O'Neal, and Phoebe Winter.

Reading/language arts Level 1. Level 1 requires students to receive or recite facts or to use simple skills or abilities. Oral reading/language arts that does not include analysis of the text, as well as basic comprehension of a text, is included. Items require only a shallow understanding of the text presented and often consist of verbatim recall from text, slight paraphrasing of specific details from the text, or simple understanding of a single word or phrase. Some examples that represent, but do not constitute all of, Level 1 performance are:

- Support ideas by reference to verbatim or only slightly paraphrased details from the text.
- Use a dictionary to find the meanings of words.
- Recognize figurative language in a reading/language arts passage.

Reading/language arts Level 2. Level 2 includes the engagement of some mental processing beyond recalling or reproducing a response; it requires both comprehension and subsequent processing of text or portions of text. Inter-sentence analysis of inference is required. Some important concepts are covered, but not in a complex way. Standards and items at this level may include words such as summarize, interpret, infer, classify, organize, collect, display, compare, and determine whether fact or opinion. Literal main ideas are stressed. A Level 2 assessment item may require students to apply skills and concepts that are covered in Level 1. However, items require closer understanding of text, possibly through the item's paraphrasing of both the question and the answer. Some examples that represent, but do not constitute all of, Level 2 performance are:

- Use context cues to identify the meaning of unfamiliar words, phrases, and expressions that could otherwise have multiple meanings.
- Predict a logical outcome based on information in a reading/language arts selection.
- Identify and summarize the major events in a narrative.

Reading/language arts Level 3. Deep knowledge becomes a greater focus at Level 3. Students are encouraged to go beyond the text; however, they are still required to show understanding of the ideas in the text. Students may be encouraged to explain, generalize, or connect ideas. Standards and items at Level 3 involve reasoning and planning. Students must be able to support their thinking. Items may involve abstract theme

identification, inference across an entire passage, or students' application of prior knowledge. Items may also involve more superficial connections between texts. Some examples that represent, but do not constitute all of, Level 3 performance are:

- Explain or recognize how the author's purpose affects the interpretation of a reading/language arts selection.
- Summarize information from multiple sources to address a specific topic.
- Analyze and describe the characteristics of various types of literature.

Reading/language arts Level 4. Higher-order thinking is central and knowledge is deep at Level 4. The standard or assessment item at this level will probably be an extended activity, with extended time provided for completing it. The extended time period is not a distinguishing factor if the required work is only repetitive and does not require the application of significant conceptual understanding and higher-order thinking. Students take information from at least one passage of a text and are asked to apply this information to a new task. They may also be asked to develop hypotheses and perform complex analyses of the connections among texts. Some examples that represent, but do not constitute all of, Level 4 performance are:

- Analyze and synthesize information from multiple sources.
- Examine and explain alternative perspectives across a variety of sources.
- Describe and illustrate how common themes are found across texts from different cultures.

Writing Level 1. Level 1 requires the student to write or recite simple facts. The focus of this writing or recitation is not on complex synthesis or analysis, but on basic ideas. The students are asked to list ideas or words, as in a brainstorming activity, prior to written composition; are engaged in a simple spelling or vocabulary assessment; or are asked to write simple sentences. Students are expected to write, speak, and edit using the conventions of Standard English. This includes using appropriate grammar, punctuation, capitalization, and spelling. Students demonstrate a basic understanding and appropriate use of such reference materials as a dictionary, thesaurus, or Web site. Some examples that represent, but do not constitute all of, Level 1 performance are:

- Use punctuation marks correctly.
- Identify Standard English grammatical structures, including the correct use of verb tenses.

Writing Level 2. Level 2 requires some mental processing. At this level, students are engaged in first-draft writing or brief extemporaneous speaking for a limited number of purposes and audiences. Students are expected to begin connecting ideas, using a simple organizational structure. For example, students may be engaged in note-taking, outlining, or simple summaries. Text may be limited to one paragraph. Some examples that represent, but do not constitute all of, Level 2 performance are:

- Construct or edit compound or complex sentences, with attention to correct use of phrases and clauses.
- Use simple organizational strategies to structure written work.
- Write summaries that contain the main idea of the reading/language arts selection and pertinent details.

Writing Level 3. Level 3 requires some higher-level mental processing. Students are engaged in developing compositions that include multiple paragraphs. These compositions may include complex sentence structure and may demonstrate some synthesis and analysis. Students show awareness of their audience and purpose through focus, organization, and the use of appropriate compositional elements. The use of appropriate compositional elements includes such things as addressing chronological order in a narrative, or including supporting facts and details in an informational report. At this stage, students are engaged in editing and revising to improve the quality of the composition. Some examples that represent, but do not constitute all of, Level 3 performance are:

- Support ideas with details and examples.
- Use voice appropriate to the purpose and audience.
- Edit writing to produce a logical progression of ideas.

Writing Level 4. Higher-level thinking is central to Level 4. The standard at this level is a multi-paragraph composition that demonstrates the ability to synthesize and analyze complex ideas or themes. There is evidence of a deep awareness of purpose and audience. For example, informational papers include hypotheses and supporting evidence. Students are expected to create compositions that demonstrate a distinct voice and that stimulate the reader or listener to consider new perspectives on the addressed ideas and themes. An example that represents, but does not constitute all of, Level 4 performance is:

- Write an analysis of two selections, identifying the common theme and generating a purpose that is appropriate for both.