



Institute
and Faculty
of Actuaries

Specification

Online Assessment Platform Services Procurement

For Request For Information (RFI) Document

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Procurement Dept – Finance and Operations

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Institute and Faculty of Actuaries

On Line Assessment Platform: Request For Information Specification

Table of Contents

Section	Page Number
1 INTRODUCTION AND PROJECT BACKGROUND	2
2 PROJECT OVERVIEW	4
3 PRODUCT AND SERVICE SCOPE.....	5
4 SYSTEM REQUIREMENTS, EXAM FORMATS & TIMETABLE	7
5 CONTRACT DETAILS	9

1 INTRODUCTION AND PROJECT BACKGROUND

- 1.1.1 We would like to use this RFI as an opportunity to review our current platforms. The Institute and Faculty of Actuaries (IFoA) believes that it is necessary to enter the marketplace and investigate the options available in order to meet its expectations with regard to level of service, timely delivery and competitive pricing for an Online Assessment Platform.

IFoA's vision is for this procurement to establish an Online Assessment Platform with a support service from a single or multiple Contractor(s) that provides end-users with the optimum combination of quality, service level and value for money.

- 1.1.2 IFoA first started running online examinations back in 2006 with the delivery of the first Business Awareness Online Practical Examination. This enabled us to offer our overseas students the opportunity to sit the examination without having to travel to the UK. Since then we have gone through numerous changes and developments as we have striven to offer the best possible and practical delivery of the examinations.

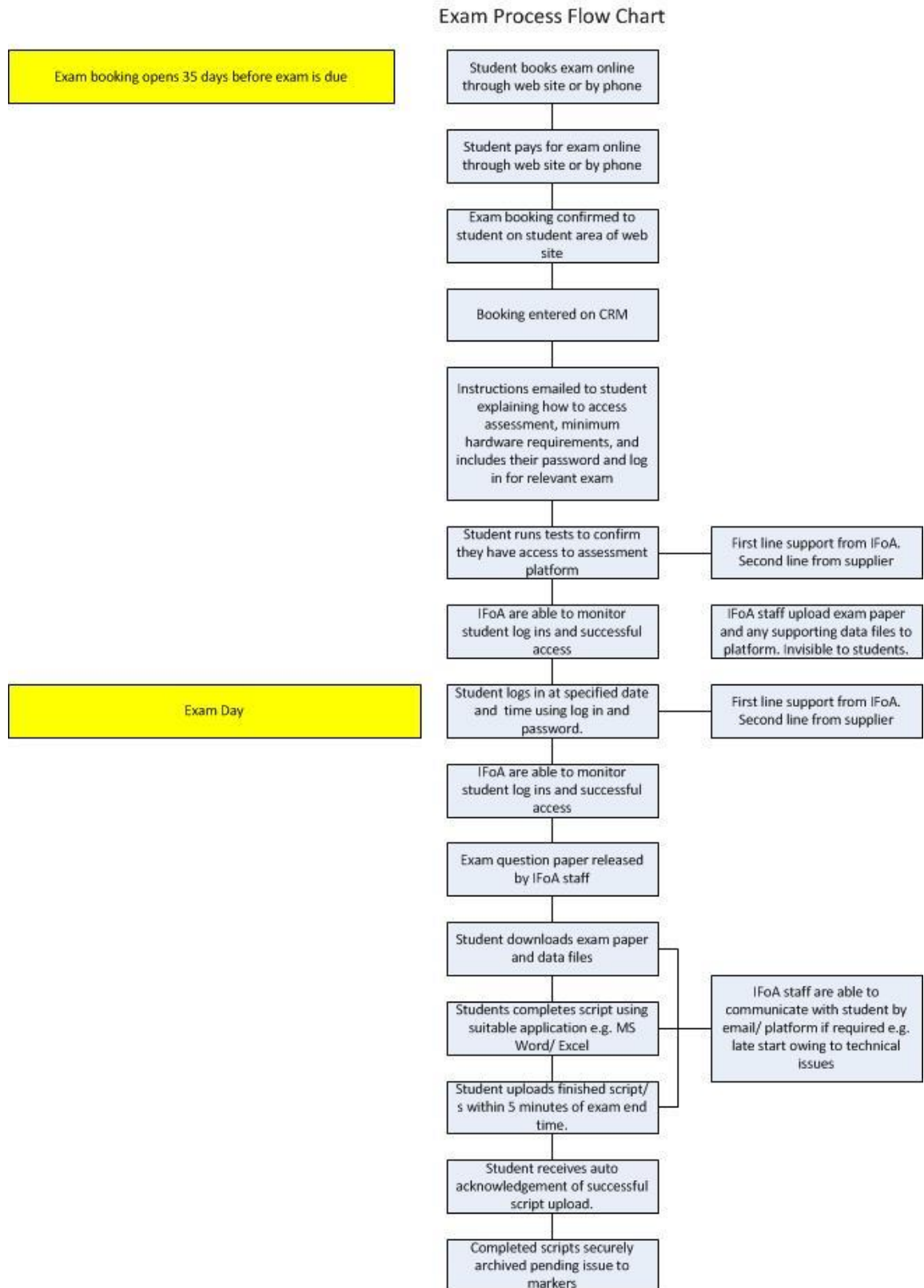
Currently three main subjects are run online: Communications (CP3), Model Documentation, Analysis and Reporting (CA2) and Business Awareness (CT9).

IFoA is introducing a new curriculum in December 2018 and has a requirement to put more assessments online from April 2019. This will necessitate online portal availability for four extra online assessments involving possibly up to 6,000 extra online student assessments per session on top of the current 2,000 per session.

Introduction of the new curriculum is seen as an ideal opportunity to harmonise the existing provision of on line platforms and enhance the security aspects of the examinations, particularly around proctoring and plagiarism.



1.1.3 Illustration of Current Exam Process



2 PROJECT OVERVIEW

- 2.1.1 IFoA invites proposals from the bidder for Online Assessment Platform services as defined within this document and subsequent discussion.
- 2.1.2 The scope of the project includes solution design, commissioning, implementation, documentation, training, maintenance, and ongoing support services.
- 2.1.3 IFoA wishes to appoint either a single or multiple contractor(s) to meet the requirements defined in the RFI. IFoA recognises that some elements of the required services may be sub-contracted to other parties.
- 2.1.4 Following the RFI a shortlist of preferred bidders will be drafted. The chosen companies will work in collaboration with IFoA to understand IFoA's proposed development and to further customise their bids appropriately. This process will require the preferred Bidders to demonstrate the capability of their proposed solution prior to final contract award with the final preferred Bidder.
- 2.1.5 IFoA will require the selected contractor to maintain and support the solution to an appropriate level by providing a comprehensive, proactive managed service. During the exam period an escalation point will need to be provided for access issues.
- 2.1.6 The contractor will proactively ensure that IFoA is kept informed about software releases, new technology developments and is provided with early access to any new technologies.

3 PRODUCT AND SERVICE SCOPE

User Profiles:

3.1.1 Student End User

- UK and International Locations
- Home or Work based for the assessment
- English possible 2nd Language
- Multi OS user

Staff User

- Admin staff UK office based

3.1.2 The scope of the On Line Assessment Platform services which are required to be provided by the service provider are listed here:

3.1.3 Mandatory Requirements

User Experience

- Easy and intuitive for all users - candidates, assessors and operational staff to use
- Student must be able to test log in, hardware compatibility and line speed at least 24 hours before exam date
- Question papers are printable but not editable
- Must take account of students with Access Arrangements e.g. screen readers, text magnifiers and WCAG compliant
- Must include secure log in – high level password required, possibly 2 stage verification
- Capable of handling MS Office applications Word and Excel plus R as well as multiple choice papers.
- Integrate with website/ CRM (Integra) to automatically send log in details once application is accepted
- Communicate through open APIs to e-marking tool

Staff Experience (including markers)

- Support provided during “exam season” (April and September)
- Second line support from provider
- Allow in house customisation of candidate instructions
- Administration of system i.e. setting of exam dates, exam details and resolving standard queries
- Uploaded scripts available to markers
- Channels of contact with students whilst assessments are in progress. E.g. communication of delays etc.
- Demonstration of adequate availability of monitoring and reporting

Technical

- Server availability 24 hours per day during exam periods
- 8,000 concurrent log ins for both download of questions and then upload of scripts

- Auto acknowledgement of receipt of uploads to include time stamp
- Multi OS compatibility
- Web based i.e. no application downloads required.
- Secure upload/download
- We would encourage use of Open Source code and “standard” packages rather bespoke developments. We are prepared to adapt our processes to fit the solution
- Archiving and deletion of scripts and question papers
- Using the CRM as the SOLE source of personal information for students
- Must be GDPR compliant
- Appropriate SLAs for ongoing support and server availability
- Provider to host the solution
- Bar uploads post x minutes of finish. (x should be configurable by IFoA staff)
- Single sign on through IFoA website (SAML)
- Ability to archive historical data
- Solution must link with IFoAs Drupal website

3.1.4 **Desired Requirements**

- Demonstration of security options such as remote proctoring
- Secure time stamp for upload START. i.e. question finish.
- Ability to limit size of upload file
- Ability for system to auto compress file on upload
- Integrate with existing online third party information provision e.g. pre-exam briefings not available from IFoA web site
- Supporting documentation e.g. Exam Guidance notes
- Ease of access to Subject Access Request information
- IFoA brand compliant
- Allow in house customisation of question sets

4 SYSTEM REQUIREMENTS, EXAM FORMATS & TIMETABLE

4.1.1 Overview of exam assessments, associated software, file size and indicative student numbers

Curriculum 2019 Computer Based Exam Assessments									
SUBJECT		EXAM DURATION	PAPERS REQUIRED AT EXAM START - DOWNLOAD	DOWNLOAD FILE TYPE	DOWNLOAD FILE SIZE KB (estimated)	COMPLETED EXAM PAPERS UPLOAD	EXAM PLATFORM	UPLOAD FILE SIZE KB (estimated)	Forecast student Numbers 2019
CS1B		1HR 45 MINS	3 Exam Guidance Exam paper Exam paper data file	Adobe PDF Adobe PDF csv/excel	1800 100 350	2 Answer Paper Answer paper - R data file	Adobe Reader WORD WORD	500	3400
CS2B		1HR 45 MINS	3 Exam Guidance Exam paper Exam paper data file	Adobe PDF Adobe PDF csv/excel	1800 50 100	2 Answer Paper Answer paper - R data file	Adobe Reader WORD WORD	150	1300
CP3		Advance release of scenario 3 HR 15 MINS	4 Exam Guidance Exam Scenario Exam Paper Exam Paper Data File	Adobe PDF Adobe PDF Adobe PDF Excel	1800 50 120	1 Answer Paper	Adobe Reader Word	50	1000
CM1B		1HR 45 MINS	5 Exam Guidance Exam Paper CM1B Q1 CM1B Q2 CM1B Q3	Adobe PDF Adobe PDF Excel Excel Excel	1800 200 50 50 50	3 Answer Paper CM1B A1 Answer Paper CM1B A2 Answer Paper CM1B A3	Adobe Reader Excel Excel Excel	50 200 100	1500
CM2B		1HR 45 MINS	5 Exam Guidance Exam Paper CM2B Q1 CM2B Q2 CM2B Q3	Adobe PDF Adobe PDF Excel Excel Excel	1800 200 50 50 50	3 Answer Paper CM2B A1 Answer Paper CM2B A2 Answer Paper CM2B A3	Adobe Reader Excel Excel Excel	100 100 150	1300
CP2	PAPER 1	Day One 3 HR 15 MINS	3 Exam Guidance Exam Paper 1 Exam Paper 1 - Data File	Adobe PDF ADOBE PDF Excel	8059 850 50	2 Exam Answer paper 1 Exam Answer Paper 1 Audit Trail	Adobe Reader Excel Word	150 100	1300
	PAPER 2	Day Two 3 HR 15 MINS	3 Exam Guidance Exam Paper 2 Exam Paper 2 Exam Model	Adobe PDF ADOBE PDF Excel	8059 850 200	2 Answer Paper 2 Exam Model Answer Paper 2 Summary	Adobe Reader Excel Word	200 120	1000

4.1.2 On Line assessments, from April 2019 will be held on the following timetable:

Exam	Description	Frequency
CM1B	Actuarial Mathematics 1	April & September
CM2B	Actuarial Mathematics 2	April & September
CS1B	Actuarial Statistics 1	April & September
CS2B	Actuarial Statistics 2	April & September
CP2	Modelling	April & September
CP3	Communication	April & September

4.1.3 IFoA is a member driven organisation and will need to provide assessments on their due dates. Implementation will, therefore, need to integrate with the schedule above.

4.1.4 We are aiming for a go live for the online portal in time for our April 2019 exams. Therefore the solution should be ready December 2018.

5 CONTRACT DETAILS

5.1.1 Contract Period and Payment Terms

The contract shall be for a period of 5 years with a mid-term review and evaluation against performance of the services.

IFoA shall be entitled to end the contract prior to the end of the 5 year term on certain prescribed grounds identified by the contract, i.e. quality concerns, responsiveness and lack of effective cost reporting/monitoring.

5.1.2 IFoA uses standard 30 day payment terms.

5.1.3 Contract Monitoring

- We require reporting at least per exam session
- There would be an annual review of the services which will take place between the key client team and representatives of IFoA.
- Regular review of platform working as discussed within the tender document or subsequent agreed proposals.

5.1.4 End of Contract

At the end of the contract, we would expect any incumbent provider to co-operate with any future appointed provider in the transfer of files and/or other IFoA information and documentation as IFoA reasonably requires.