Specification

Online Assessment Platform Services Procurement

For Request For Information (RFI) Document

Return Date 22<sup>th</sup> December 2017

November 2017

Procurement Dept – Finance and Operations

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# On Line Assessment Platform: Request For Information Specification

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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 online platforms and enhance the security aspects of the examinations, particularly around proctoring and plagiarism.
1.1.3 Illustration of Current Exam Process

Exam Process Flow Chart

- Exam booking opens 35 days before exam is due
- Student books exam online through website or by phone
- Student pays for exam online through website or by phone
- Exam booking confirmed to student on student area of website
- Booking entered on CRM
- Instructions emailed to student explaining how to access assessment, minimum hardware requirements, and includes their password and log in for relevant exam
- Student runs tests to confirm they have access to assessment platform
  - If FoA are able to monitor student log ins and successful access
    - First line support from FoA, Second line from supplier
  - If FoA staff upload exam paper and any supporting data files to platform, invisible to students.
- Exam Day
  - Student logs in at specified date and time using log in and password.
  - If FoA are able to monitor student log ins and successful access
  - Exam question paper released by FoA staff
- Student downloads exam paper and data files
  - Students completes script using suitable application e.g. MS Word/Excel
  - Student uploads finished script(s) within 5 minutes of exam end time.
  - Student receives auto acknowledgement of successful script upload.
- Completed scripts securely archived pending issue to marker
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 subcontracted 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 quereis
- 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
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- 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
# System Requirements, Exam Formats & Timetable

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

### Curriculum 2019 Computer Based Exam Assessments

<table>
<thead>
<tr>
<th>Subject</th>
<th>Exam Duration</th>
<th>Papers Required at Exam Start - Download</th>
<th>Download File Type</th>
<th>Download File Size KB (estimated)</th>
<th>Completed Exam Papers Upload</th>
<th>Exam Platform</th>
<th>Upload File Size KB (estimated)</th>
<th>Forecast Student Numbers 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>CS1B</td>
<td>1HR 45 MINS</td>
<td>3 Exam Guidance, Exam Paper, Exam Paper data file</td>
<td>Adobe PDF, Adobe PDF, csv/excel</td>
<td>1800, 100, 350</td>
<td>Adobe Reader - Answer Paper, Answer Paper - R data file</td>
<td>Adobe Reader - WORD, WORD</td>
<td>500</td>
<td>3400</td>
</tr>
<tr>
<td>CS2B</td>
<td>1HR 45 MINS</td>
<td>3 Exam Guidance, Exam Paper, Exam Paper data file</td>
<td>Adobe PDF, Adobe PDF, csv/excel</td>
<td>1800, 100, 50</td>
<td>Adobe Reader - Answer Paper, Answer Paper - R data file</td>
<td>Adobe Reader - WORD, WORD</td>
<td>150</td>
<td>1300</td>
</tr>
<tr>
<td>CP3</td>
<td>3 HR 15 MINS</td>
<td>4 Exam Guidance, Exam Scenario, Exam Paper, Exam Paper Data File</td>
<td>Adobe PDF, Adobe PDF, csv/excel, Excel</td>
<td>1800, 100</td>
<td>Adobe Reader - Answer Paper</td>
<td>Adobe Reader - Word</td>
<td>50</td>
<td>1000</td>
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<td>CM1B</td>
<td>1HR 45 MINS</td>
<td>5 Exam Guidance, Exam Paper, CM1B Q1, CM1B Q2, CM1B Q3</td>
<td>Adobe PDF, Adobe PDF, Excel</td>
<td>1800, 200, 50, 50</td>
<td>Adobe Reader - Answer Paper CM1B A1, Answer Paper CM1B A2, Answer Paper CM1B A3</td>
<td>Adobe Reader - Excel, Excel, Excel</td>
<td>50, 200, 100</td>
<td>1500</td>
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<tr>
<td>CP2 PAPER 1</td>
<td>Day One</td>
<td>3 HR 15 MINS</td>
<td>3 Exam Guidance, Exam Paper 1, Exam Paper 1 - Data File</td>
<td>Adobe PDF, ADOBE PDF, Excel</td>
<td>8059, 850, 50</td>
<td>Adobe Reader - Exam Answer paper 1, Exam Answer Paper 1 Audit Trail</td>
<td>Adobe Reader - Excel, Word</td>
<td>150, 100</td>
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<tr>
<td>PAPER 2</td>
<td>Day Two</td>
<td>3 HR 15 MINS</td>
<td>3 Exam Guidance, Exam Paper 2, Exam Paper 2 Exam Model</td>
<td>Adobe PDF, ADOBE PDF, Excel</td>
<td>8059, 850, 200</td>
<td>Adobe Reader - Answer Paper 2 Exam Model, Answer Paper 2 Summary</td>
<td>Adobe Reader - Excel, Word</td>
<td>200, 120</td>
</tr>
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4.1.2 On Line assessments, from April 2019 will be held on the following timetable:

<table>
<thead>
<tr>
<th>Exam</th>
<th>Description</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>CM1B</td>
<td>Actuarial Mathematics 1</td>
<td>April &amp; September</td>
</tr>
<tr>
<td>CM2B</td>
<td>Actuarial Mathematics 2</td>
<td>April &amp; September</td>
</tr>
<tr>
<td>CS1B</td>
<td>Actuarial Statistics 1</td>
<td>April &amp; September</td>
</tr>
<tr>
<td>CS2B</td>
<td>Actuarial Statistics 2</td>
<td>April &amp; September</td>
</tr>
<tr>
<td>CP2</td>
<td>Modelling</td>
<td>April &amp; September</td>
</tr>
<tr>
<td>CP3</td>
<td>Communication</td>
<td>April &amp; September</td>
</tr>
</tbody>
</table>

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.