

Ministry of Education and Research

For candidates

Your reference

Your date

Our reference
14/2003

Our date
26 June 2014

Effect study of continuing education for teachers

Qualification for competitive dialogue

Regulations relating to public procurement Part III (FOR-2006-04-07-402)

Case 14/2003

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Terms of reference

1 Introduction

1.1 On the contracting authority

The contracting authority is the Ministry of Education and Research, which has the overall sector responsibility for kindergarden, primary and lower secondary education, upper secondary education, tertiary vocational education, higher education as well as research and lifelong learning.

1.2 In general on the procedure

The Ministry of Education and Research (hereinafter often referred to as “the principal”) wants to carry out a qualification of research teams for a “competitive dialogue” regarding an effect study of continuing education for teachers in the primary and lower secondary schools. The procedure for participation in the competitive dialogue will be carried out in accordance with the applicable Act of 16 July 1999 No. 69 relating to public procurement (LOA) and the Regulation relating to public procurement of 7 July 2006 No. 402 (FOA). The supplier will be selected based on the procedure “competitive dialogue”.

The competitive dialogue procedure will be comprised of several steps. This announcement is an invitation to qualify to take part in the competitive dialogue.

Up to the three best qualified research teams, based on the selection criteria described in this document, will be invited to dialogue meetings with the Ministry. The application for qualification should not contain proposals for design solutions as this will be part of the dialogue phase. The dialogue will be based on Section 20-8 of the FOA Regulation. The research teams invited to the dialogue phase will be compensated for some of their expenditures associated with the work in the dialogue phase in the amount of NOK 60,000 incl. VAT per research team/tenderers.

The competitive dialogue will continue until the Ministry ends the dialogue process and asks for a final tender from the research teams based on their proposed solutions. This tender competition will be carried out in accordance with Section 20-9 of the FOA Regulation. Thereafter the Ministry will make the final decision whether in fact the effect study will be carried out.

1.3 Confirmation

Confirmation is done electronically in Mercell by clicking the tab “Registrer kvalifikasjonsanmodning” (Register qualification request) and then the button

(Wants to submit qualification request)

or alternatively


(Does not want to submit qualification request)


The confirmation request will provide the principal with an indication of which parties are interested. Such a request is not binding for the tenderers. The tenderers are requested to confirm whether they want to submit/or not submit as soon as possible.

1.4 Communication

All communication during the process must take place via the procurement portal Mercell, www.mercell.no, to ensure all communication may be logged.

When you have accessed the tender, select the *Kommunikasjon (Communication)* tab.

Then click the symbol  New message. Type in the information to be submitted to the principal and

then click . The principal will then receive your message. The principal will issue information of interest for all tenderers. The principal will attempt to not release information which will reveal unique and important aspects of proposed solutions from specific tenderers to the extent this is possible.

Supplementary information is available if you first click the tab *Kommunikasjon (Communication)* and then the tab *Tilleggsinformasjon (Supplementary information)*. You will also receive an e-mail with a link to the supplementary information.

Any inquiries received later than 5 working days before the deadline for submission of the application, will not be answered.

2 Description of needs

2.1 Background:

Credits are issued for continuing education courses provided by university colleges and universities. Credits are not issued for further education courses, and such courses are also offered by players outside the university and university college sector. The school owner is the party responsible for making sure that the schools have the appropriate and necessary competence, and that some scheme has been established to provide the employees with opportunities for necessary professional development, cf. Section 10-8 of the Education Act. The government has, however, established a competence enhancement system to support the school owners, and this is comprised of three main elements: continuing education for teachers, post education within national priority areas and head teacher education.

The government has established schemes for financing substitute teachers and scholarships for continuing education. Under the temporary replacement scheme, the government covers 75% of the expenditure for continuing education in mathematics and science and 60% of the expenses for continuing education in other subjects. The teachers' share is 25% of the substitute teacher expenses through use of their own time, while the school owners cover 15% of the expenses for continuing education in subjects other than mathematics and science. Under the scholarship scheme, teachers are granted NOK 100,000 in the form of a scholarship for continuing education resulting in 30 credits in prioritised subjects, in particular mathematics. Under both schemes, the government finances study places in continuing education at university and university college institutions, while the school owners cover the expenses associated with travel, accommodations, teaching aids, etc. In 2014, the Government spends about NOK 600 million on continuing education, cf. Proposition to the Storting S 93 (2013-2014) Additional appropriations and changes in priorities in the 2014 Government Budget.

In the strategy document "Competence for Quality. Strategy for further and continuing education 2012–2015", the parties within the sector agreed on the prioritisation of subjects within the continuing education for teachers. The subjects covered by the strategy are Norwegian/Sami, mathematics, reading education, English, upper secondary education including vocational programme subjects, second language pedagogy, counselling, food and health, physical education, music, art and crafts. "School management" was offered as a new field starting from 2013. In 2014, the number of courses in mathematics and science was increased significantly and numeracy as a basic skill was introduced as a new continuing education course.

The Norwegian Directorate for Education and Training manages the continuing education scheme for teachers on behalf of the Ministry of Education and Research. The decision process for assignment of study places for continuing education is described in more detail in the enclosed Document 2.

2.2 Delivery

The Ministry of Education and Research wants to obtain the best possible knowledge regarding whether continuing education for teachers who are teaching in the primary and lower secondary school does have a causal effect on the students' learning outcome. With this objective in mind, the Ministry wants to establish a competitive dialogue with qualified research communities in order to identify a research design which will generate knowledge with the highest possible evidence regarding the causal effect of continuing education on students' learning outcome. It may be relevant to also discuss outcome variables other than the students' learning outcome. The dialogue phase will be based on the issues addressed in the enclosed Document 1.

It must be kept in mind that the effect study must not to an unreasonable degree be at the expense of the teachers' opportunity to participate in continuing education. This entails that the Ministry has stipulated as a premise for the research project that the annual target figure for the number of teachers who receive continuing education may not be reduced as a consequence of the research project, cf. Proposition to the Storting S 93 (2013-2014) Additional appropriations and changes in priorities in the 2014 Government Budget. It is also a premise that no individual municipality is forced to wait with professional development measures due to the design of the research project. The final premise is that the design may not deprive the municipalities of the possibility to prioritise who will be allowed to participate in continuing education.

If it is possible to overcome the practical and methodical challenges, the Ministry of Education and Research is of the opinion that an effect study will provide the best possible indication of whether the measure functions as intended. The Ministry of Education and Research primarily wants to address the effectiveness of the continuing education in terms of the students' subject performance. It may, however, be relevant to discuss measurement of other effects of the continuing education programme.

It is challenging to measure the effects of this type of measure. Several alternative research designs are available. Their assumptions and quality (degree of evidence) vary. The Ministry of Education and Research would like to establish a dialogue with qualified research communities in order to determine which research design will yield the best possible knowledge regarding the effects while still being feasible in practical terms given the design of the measure and other associated premises.

By establishing an open dialogue with research teams, the Ministry of Education and Research would like to discuss the needs, requirements and framework conditions in light of various different research designs. The final proposal for a solution will be in the form of tenders from the research teams. The Ministry of Education and Research will then evaluate whether the proposals are in compliance with the needs of and the requirements stipulated by the Ministry, which serve as premises for the execution of the effect study. Thus, the purpose of the present assignment is to provide the Ministry with the best possible basis for making decisions as regards the possibility of performing an effect study.

Stages in the process:

- Step 1: Competitive dialogue with researchers in order to develop one or more detailed designs for an effect study of continuing education for teachers.
- Step 2: A design has been put forth and the Ministry makes a decision regarding the possible implementation and organisation of the effect study.
- Step 3: Dialogue and cooperation with relevant parties (school owners and teachers) are established for performing an effect study of continuing education for teachers.

The issues and premises to be discussed with the tenderers have been addressed in Appendix 1 to this memo. Appendix 2 has a more detailed description of the system for continuing education.

2.3 Scope

The financial framework for the actual effect study has not been decided and will depend on the research design and project plan selected. It is assumed, however, that the realisation of the effect evaluation project may range from NOK 1 to 10 million incl. VAT. In principle, the Ministry will be interested in proposals for both more and less comprehensive evaluation schemes.

Start-up of the project should be as quickly as possible after the award of the contract in order to prepare for the evaluation of the effects for teachers who apply for continuing education for the 2015/2016 school year.

3 Administrative conditions and provisions

3.1 Contact information

All communication regarding the qualification process must be submitted to the principal via the communication module in the Merccell application by the stipulated deadlines.

3.2 Language

All documents and communication related to this procurement must be in either Norwegian/Scandinavian or English. The dialogue may be conducted in English. The qualification documents have been translated into English. In case of conflict between Norwegian and English documents, the Norwegian version shall apply.

3.3 *Deadlines*

Inquiries relating to this case must be submitted in writing via the communication module in the Mercell application by 11 August 2014

The application deadline is **18 August 2014 at 12:00 hours**. The application must be submitted electronically via the Mercell portal by this deadline.

The principal will reject any applications received too late.

3.4 *Tentative schedule*

Milestone	Date
Official announcement qualification	26 June 2014
Deadline for inquiries	11 August 2014
Deadline for applications	18 August 2014 at 12:00 hours
Evaluation	Week 35
Recommendation/communication regarding participation	Week 36
Dialogue phase	Weeks 37-41

3.5 *Updating of the qualification basis*

The Ministry reserves the right to make corrections, provide supplement information or make changes to the qualification questionnaire of an insignificant nature up until the deadline for submitting applications. Corrections, supplements or changes will be issued to all parties who have indicated their interest via Mercell. Information provided by the Ministry upon request from one research team/tenderer, will also be issued to all other parties in an anonymised form.

In case of revision of the qualification information, this will be indicated as a new version of the qualifying competition. As regards additional information, this will be shown under the tab *Tilleggsinformasjon (Supplementary information)* in the Mercell portal. Research teams/tenderers who already have indicated their interest, will also be notified via e-mail if any supplementary information has been provided regarding the qualifying competition or if the competition has been revised. If such notice is provided, use the link provided in the message to access the relevant part of the competition.

3.6 *Mistakes in the tender terms of reference*

If a research team/tenderer should discover any mistakes, flaws, omissions or ambiguities in the tender terms of reference, the tenderer in question is obliged to immediately notify the principal of this via the communication module in the Mercell portal. The tenderers are obliged to review the tender terms of reference with enclosures in a prudent manner, and are responsible for familiarising themselves with all elements which may affect the delivery.

3.7 *Acceptance of terms and conditions*

The tenderers must state that all terms and conditions described in this document have been accepted.

It is possible for researchers within one legal entity to submit an application and tender in cooperation with other legal entities as a joint research team. If so, all parties involved in the

joint team must agree to and accept the terms and conditions described in this qualification document for the competitive dialogue.

3.8 *Structure of the application*

The application must start with a signed letter and then be structured based the outline presented in this document.

The tenderers are fully responsible for making sure that all questions, requirements and clarification items are answered/addressed and documented in the application.

The application must be structured based on this outline:

File name:	Content/answer:
Qualification requirements	The documents must be enclosed under each requirement under the step <u>Kvalifikasjonskrav (Qualification requirement)</u> when you apply via Mercell.
K 01 - Tax certificate (national requirement)	Ref. Item 4.1 in this document
K 02 - Value-added tax certificate. (national requirement)	Ref. Item 4.1 in this document
K 03 - HSE self-declaration (national requirement)	Ref. Item 4.1 in this document. Complete the enclosed HSE self-declaration
K 04 - List of references	Ref. Item 4.2 List of references for the tenderer's deliveries over the last 3-5 years of relevance for this assignment.
K 05 – Competence and capacity	Ref. Item 4.2 Description of the tenderer's professional competence and capacity as well as the professional competence and capacity of any subcontractors.
Application documents	The documents are submitted under the step <u>Documents</u> when you apply via Mercell.
Doc 01- Application	Signed letter with acceptance of the terms and conditions of the tender terms of reference and draft agreement. Reasons must be provided for any reservations, and alternative wording must be provided.

A more detailed description of the qualification requirements is available under Item 4 below.

3.9 *Submission of application*

All applications must be submitted electronically via the Mercell portal, www.mercell.no, by the stipulated deadline. Any applications submitted too late will be rejected (the system will not allow submission of applications electronically via Mercell after the deadline has expired.)

If you are not a user of Mercell or have questions relating to the functionality of the tool, such as how to apply, for example, please contact Mercell Support via tel.: +47 21 01 88 60 or e-mail: support@mercell.com.

It is recommended that the application be submitted well before the deadline expires, e.g. minimum 1 hour before expiry of the deadline. In the event the ministry should provide any supplementary information which entails that you would like amend the application before the deadline expires, you may access the application, make any necessary changes and submit it once more up until the deadline expires. The application submitted last will be considered the final application.

The application must be signed electronically upon submission. In connection with the submission of the application, you will be asked to submit an electronic signature to acknowledge that you in fact are the tenderer who is submitting the application. Electronic signatures may be obtained via www.commfides.com, www.buypass.no or www.bankid.no.

Please note that it may take a few days before you will receive the electronic signature, so you should start this process as soon as possible.

The application must be dated and signed by an authorised representative of the tenderer. There will no public opening of the applications.

4 Qualification requirements

4.1 Mandatory qualification and documentation requirements (national requirement)

Compliance with national qualification requirements must be documented by all Norwegian applicants. Any foreign applicants/partners need not submit documentation of compliance with national qualification requirements. The applicants/ partners should, however, submit what is required and of relevance within other areas.

Qualification requirement:

- Payment of taxes and fees.
- Compliance with statutory requirement related to health, safety and the environment.

Documentation requirements:

- Tax certificate and value added tax certificate, no older than 6 months, issued by the competent authority which confirm that the tenderer has fulfilled the obligations as regards payment of taxes, national insurance contributions and value added tax. Tax certificates are issued by the tax collector in the municipality where the tenderer has the main office and by the tax collector in the county where the municipality is located.
- HSE self-declaration

Any tenderers with tax certificates showing outstanding amounts will be rejected. This rule may be deviated from in case the tenderer in question is involved in a dispute with the tax authorities. If so, documentation concerning the case must be submitted as part of the application.

4.2 The technical and professional qualifications of the tenderer

Qualification requirement:

- At least 3 relevant deliveries over the last 3-5 years of relevance for this assignment. Relevance in this context shall be understood to mean experience with effect studies or other types of relevant evaluations within the education sector.

- The tenderer must have adequate professional expertise and capacity to complete the assignment.

Documentation requirements:

- List of references showing the tenderer's deliveries over the last 3-5 years of relevance for this assignment with the name of the principal, the value of the assignment and a reference. What has been delivered, which role the tenderer played in the delivery and which research design was used must also be stated.
- It must be substantiated in the application that the tenderer has adequate professional and methodical competence, as well as that the tenderer has an adequate capacity to abide by the stipulated deadlines.

5 Selection criteria (SC)

The following selection criteria will be used for an overall assessment of the applicants to determine who will be included in the dialogue phase:

SC 1 – Relevant experience with effect study

Under this criterion, the following will be assessed:

- The team's competence and experience of relevance for the assignment.
- The team's documented experience with evaluations.

SC 2 – Competence in the primary and lower secondary school sector in Norway

The following elements will be assessed:

- The team's knowledge of the educational sector.
- The team's experience with projects of relevance for the assignment

CVs for the personnel who will be made available for assignment must be enclosed under K05. What percentage of the project will be handled by each person must be indicated. If several legal entities collaborate on the assignment, it should be stated clearly which role each individual member of the dialogue will play.

6 Overview of enclosures

These appendices are enclosed with the tender terms of reference:

- **Appendix 1:** "Design of effect study of continuing education for teachers: issues to be discussed in the dialogue with tenderers".
- **Appendix 2:** "System for continuing education".