**Validating survey scales for constructs relevant to widening participation and student success**

September 2021

**Introduction**

The Centre for Transforming Access and Student Outcomes in Higher Education (TASO) aims to improve lives through evidence-based practice in higher education (HE). Our vision is to eliminate equality gaps for disadvantaged and underrepresented groups, allowing all students to have the same chance to enter HE, get a good degree and progress into further study or employment.

TASO was set up in 2019, by a consortium of King’s College London, Nottingham Trent University and the Behavioural Insights Team.

We are an independent hub for HE professionals to access research, toolkits and evaluation guidance to eliminate equality gaps. We inform practitioners of the best available evidence and produce new evidence on the most effective approaches.

TASO is an affiliate ‘What Works’ centre and is part of the [UK Government’s What Works Movement.](https://www.gov.uk/guidance/what-works-network) This means that TASO is committed to the generation, synthesis and dissemination of high-quality evidence about effective practice in widening participation and student success.

As part of TASO’s goal to help the sector produce more Type 3 evidence and understand which activities are most effective, this project aims to build on our existing survey design and validation [guidance](https://taso.org.uk/evidence/resources-hub/survey-design-and-validation/) by developing a bespoke survey that widening participation and student success teams can use to measure key intermediate outcomes.

**Project scope**

Identifying and measuring intermediate outcomes relevant to widening participation and student success is a crucial prerequisite to producing more robust evidence on what works in reducing inequality in HE. Currently, higher education providers (HEPs) use a variety of psychological and psychosocial survey scales to assess relevant outcomes. The scales being employed for pre-entry interventions are often pre-existing validated scales used to measure constructs that may be predictive of educational attainment, which is the primary causal factor in predicting participation in HE. These constructs include self-efficacy, engagement with school, resilience, and sense of belonging.

Although there are opportunities to use pre-existing scales to measure these constructs and evaluate outreach activity, using ‘off the shelf’ validated scales poses some challenges:

* Many of the scales are developed in the US and therefore employ language and idioms that are not appropriate for the HE context in the UK.
* Often, the language used is not appropriate for the age groups taking part in the evaluation.
* The variety of scales used seem to employ a range of different scoring systems - some multiple choice and some Likert scale designs. This can cause issues when multiple scales are being used and evaluators are trying to harmonise between scales.
* Many of the scales are lengthy and can cause challenges with response and completion rates.
* Some of the scales are commercially-protected and sit behind a paywall, making them unequally available to different HEPs and widening participation teams.
* There is a lack of consistency in the scales used across the sector, making it difficult to compare findings from evaluations conducted by different widening participation and student success teams.

This project aims to review the existing scales used to measure common intermediate outcomes and design a multi-scale questionnaire that can be used across widening participation and student success teams. We are commissioning a supplier to conduct the following three phase project:

**Phase 1: Consult and Review**

* + Consult the sector to improve our understanding of the intermediate outcomes commonly observed and the existing scales used to measure these outcomes.
	+ Review existing material and publications to build a greater understanding of the intermediate outcomes currently observed. For example, the Uni Connect Progression Frameworks will be included in the consultation phase.
	+ Review the relevant literature to better understand which psychological and psychosocial constructs are predictive of educational attainment and enrollment into HE. This is an important activity for ensuring an informed decision about which survey scales to develop as part of the project.
	+ Review existing scales and identify where they can be adjusted, if at all, to the UK widening participation and student context without compromising validity.
	+ Decide on a number of constructs to focus on. This decision will be made, in consultation with the sector, based on existing evidence and the sector’s need. We estimate developing a minimum of 5 survey scales as part of the bespoke questionnaire.
	+ This phase will also include surveying the sector to understand whether there is a need for accessible, relevant guidance on how to design and validate their own survey scales.

**Phase 2: Develop and Design**

* + Develop a number of survey scales for the constructs identified in the consult and review phase. The exact number of survey scales and parameters for the develop end design phase will be further developed as part of the consult and review phase, however, we anticipate developing a minimum of 5 constructs that relate to the breadth of activities delivered as part of widening participation outreach and student success work.
	+ Conduct cognitive testing with the relevant audiences for each survey scale. We intend the develop and design phase to include a round of cognitive testing for each survey scale. Please note, some of the scales may also need to be tested with different year groups. For example, if ‘sense of belonging’ is one of the constructs we want to develop a survey scale for, it will need to be tested with pre-entry to HE cohorts and cohorts that are already at a HE institution.
	+ Conduct descriptive analysis to understand the means and standard deviations of responses to each item and evaluate the item range and variance. This will help us understand whether the survey items are functioning in the way that we intend them to.
	+ Please note, the full factor analysis - required to validate the scales - will fall outside the scope of this project and will be performed once enough data has been generated from piloting the draft bespoke survey with ‘early adopters’.

**Phase 3: Produce Guidance**

* + Produce a bespoke questionnaire that incorporates subscales for the multiple different constructs identified in the earlier phases of the project. The aim is that providers will be able to pick and choose between different subscales but not specific items. For example, if a provider wanted to measure self-efficacy, they would have to use all the items for that subscale.
	+ Produce an accessible user guide to help evaluators and practitioners implement the bespoke survey.
	+ Produce accessible guidance on how to design, pilot and validate survey scales. TASO recognises that, as well as creating a bespoke questionnaire that includes the constructs commonly observed by the sector, there is a need for evaluators and practitioners to be able to develop scales that are relevant to their unique context and outreach. We anticipate that this guidance will consist of a series of web pages on the TASO website, short videos and links to useful resources to cover the following steps in the survey validation process:
		- Literature review
		- Consultation with prospective respondents
		- Synthesis of literature review and input from prospective respondents
		- Developing the survey items
		- Cognitive testing
		- Pilot testing
		- Factor analysis

**Requirements**

This section outlines the requirements expected from the chosen supplier.

**Project deliverables**

* Interim report from the consult and review phase:
	+ A clear, concise, and engaging report of findings and recommendations, developed with editorial and presentation involvement from communications professional(s).
	+ Introduction – outlining the format and content of the report.
	+ Methodology – outlining the format and methodology used for the consultation with the sector and review of existing literature.
	+ A summary of key findings, including:
		- The review of existing intermediate outcomes and survey scales being used by the sector.
		- The review of existing literature.
		- The theoretical and practical considerations for designing and implementing a bespoke questionnaire that incorporates a number of survey scales.
	+ Conclusion - summarising the findings.
	+ Harvard style references provided for the evidence cited.
	+ Presentation to TASO’s advisory groups.
* A bespoke survey that covers the constructs identified during the consult and review phase.
* A user guide that references the full report and outlines, in clear steps, how to implement the bespoke questionnaire.
* Accessible guidance, including a series of webpages, short videos and case studies, on how to design and validate survey scales. This will be a ‘packaged’ version of the process used for this project. TASO has existing ideas for how to develop this guidance but also welcomes ideas from prospective suppliers as part of their response to this ITT.
* Analytical report to be published as an annex to the questionnaire
	+ Executive Summary - outlining the key findings.
	+ Introduction - outlining the format and content of the report.
	+ Methodology – outlining the methodology used.
	+ The report is to contain sections on the consultation and review, the development of survey scales (including the cognitive testing and descriptive analysis) and practical guidance and recommendations for using the bespoke questionnaire and designing and validating survey scales.
	+ Conclusion - summarising the findings and recommendations.
	+ Harvard style references provided for the evidence cited.
	+ The final report will reflect TASO’s strong commitment to, and support for, the What Works movement.
	+ The report will be provided in a format which is ready for external publication. A comprehensive outline of publication requirements will be distributed to the successful supplier.
	+ Presentation to TASO’s advisory groups.

**Project timeline**

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| Activity  | 11/21 | 12/21 | 01/22 | 02/22 | 03/22 | 04/22 | 05/22 | 06/22 | 07/22 | 08/22 | 09/22 | 10/22 |
| Inception meeting & kick-off  |  |  |  |  |  |  |  |  |  |  |  |  |
| Consult & review phase |  |  |  |  |  |  |  |  |  |  |  |  |
| Consult & review deliverables due  |  |  |  |  |  |  |  |  |  |  |  |  |
| Present progress to TASO |  |  |  |  |  |  |  |  |  |  |  |  |
| Design & develop phase |  |  |  |  |  |  |  |  |  |  |  |  |
| Present progress to TASO |  |  |  |  |  |  |  |  |  |  |  |  |
| Report to TASO’s advisory groups  |  |  |  |  |  |  |  |  |  |  |  |  |
| Guidance production phase  |  |  |  |  |  |  |  |  |  |  |  |  |
| Present progress to TASO |  |  |  |  |  |  |  |  |  |  |  |  |
| Report to TASO’s advisory groups  |  |  |  |  |  |  |  |  |  |  |  |  |
| Final deliverables due  |  |  |  |  |  |  |  |  |  |  |  |  |

**Project implementation**

The supplier will be responsible for end-to-end project management, including:

* Bi-wekly meetings with TASO to provide regular progress updates.
* Building in time and resources to liaise with TASO for formal review and sign off of each deliverable.
* Risk management.
* Ensuring the project is conducted in line with best practice, including ethical approval and data protection standards being met.
* Managing the consultation phase and stakeholder engagement. Please note, we will provide input and facilitate introductions to TASO’s advisory groups, other What Works centres, and the Office for Students but expect the successful supplier to manage the consultation process.
* Managing the cognitive testing of draft survey scales. As above, TASO will facilitate introductions, where useful. The successful bidder will need to demonstrate their capability and familiarity with complex areas including: the evaluation of widening participation and student success activities, cognitive testing and developing and validating survey scales.
* Presenting draft deliverables to, and collecting feedback from, TASO’s advisory groups.
* Reporting to, and engaging, the TASO team.

In addition to financial support, TASO will:

* Provide advice throughout the project where required.
* Meet (virtually for the foreseeable future) with the contractor as per the project timeline to offer insight and feedback on the project progress.
* Support the partner in shaping outputs and framing the final report and resources. Please note, TASO will maintain final editorial control of the content and final outputs.
* Manage the contract.

**Ethics and data protection**

The supplier will be responsible for seeking ethics approval and ensuring data protection standards are met, as part of the consultation phase and cognitive testing.

**Funding**

This project is funded by the Centre for Transforming Access and Student Outcomes (TASO).

TASO’s budget for this work is **£50,000 (inclusive of VAT and expenses)**. Responses to this invitation to tender should include accurate pricing, inclusive of expenses and VAT.

**Please note that this budget includes the development of 5 survey scales - and corresponding cognitive testing - as part of the bespoke questionnaire.** If results from the consultation phase suggest that it would be advantageous to develop additional scales, we will allocate additional funding for additional scales. **As part of your proposal, please include costings for developing discrete scales.**

Please note that assessment of responses to this tender invitation will be on perceived quality of service and demonstrable ability to meet the brief, rather than the lowest cost, but value for money is a selection criterion.

**Application and timelines**

* We invite you to submit an application using the form below.
* Please save the form using the name of your organisation.
* Submit the completed form to **research@taso.org.uk** by **midday on 19 October 2021** with the subject line **‘survey validation application’.** You will be informed of the outcome of your application in the w/c 8 November 2021.
* If you have any questions about the application process, please email **research@taso.org.uk** by **19 October 2021** with the subject line **‘survey validation query’.**
* We anticipate the project kick-off meeting w/c 15 November 2021 with final reporting in October 2022.

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| Call for applications opens | 22 September 2021 |
| Deadline for submitting questions | 12 October 2021 |
| Deadline for applications | 19 October 2021 |
| Clarification/negotiation with preferred suppliers and contracts signed | by 5 November 2021 |
| Project kick off  | w/c 15 November 2021 |

**Assessment of applications**

Your application will be assessed by the TASO Research and Evaluation team. The strength of applications will be assessed on the below criteria (please note the weighting of each section):

* *The team (40%)*
	+ The relevant experience of the project team, including knowledge and expertise of survey design and validation.
	+ Evidence of success on similar projects, including demonstration of capability to deliver the consultation, cognitive interviewing and accessible guidance.
	+ The team’s approach to transparency and accountability.
* *The application (40%)*
	+ How well the application answers the brief.
	+ How well it articulates the ability of the team to deliver all requirements and deliverables.
	+ How well it articulates the ability of the team to be responsive and flexible in delivering the brief.
* *Budget (20%)*
	+ Feasibility based on the budget submitted.
	+ Value for money.
	+ Financial stability and long-term viability of the organisation, including detail of the organisations last set of accounts and current year budget. Please note this criterion will receive a binary score of pass/fail and if not met the application will not be considered further.

**Expression of Interest Form**

Please note that hyperlinks to web-based information will not be accepted, and, if included, will not be evaluated.

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| --- | --- |
| **Lead organisation** |  |
| **Contact name** |  |
| **Contact email** |  |
| **Contact telephone** |  |
| **Where did you hear about this ITT?**  |  |
| **SECTION A: Relevant experience***Please provide details of the team who would be involved in this project and how their resources would be allocated. Describe their proposed roles and how their skills and experience are relevant to delivering the work.**[500 words max]* |
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| **SECTION B: Meeting the project brief***Please provide an overview of how you would meet the project brief. Please cover:** *How you would approach each part of the project*
* *A brief summary of key challenges/risks and you would address them*
* *A project timeline*

*[2000 words max (but please do not feel you need to meet this limit)]* |
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| **SECTION C: Project budget** *You may apply for funding to the value of £40,000 - £50,000 to deliver this project. Provide a budget showing how you propose to use the funding provided - a high level project plan, to include all deliverables and an indication of resource allocation.”**Please note that this budget includes the development of 5 survey scales - and corresponding cognitive testing - as part of the bespoke questionnaire. If results from the consultation phase suggest that it would be advantageous to develop additional scales, we will allocate additional funding for additional scales. As part of your proposal, please indicate how much additional funding you would require per additional scale.*  |
|  |
| **SECTION D: Financial stability** *Financial stability and long-term viability of the organisation is an essential criteria for this application. Please provide:** *Your organisation's last set of accounts*
* *Your organisation's current year budget.*

***You may also provide this as a pdf document alongside your completed application form.***  |
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**Additional guidance**

* TASO reserves the right, acting reasonably, to:
	+ Discontinue the award procedure in the absence of appropriate applications;
	+ Change the timetable for the procurement of the Contract, and in such circumstances TASO will notify all applicants of any change by the fastest means possible;
	+ Terminate discussions with organisations which apply;
	+ Discontinue the procedure leading to the award of the Contract;
	+ Not to award any Contract at all as a result of this process
* Under no circumstances shall TASO incur any liability in respect of any of these actions.
* No publicity regarding the project will be permitted until TASO has given express written consent to the relevant communication. No statements may be made to any part of the media regarding the nature of this application, its contents or any proposals relating to it without the prior written consent of TASO.
* TASO will not reimburse any costs incurred by organisations in connection with preparation of their applications.
* If you are unsure of the meaning of a question or anything in this call for applications then it is your responsibility to ask TASO to clarify in writing via email.
* TASO will aim to answer clarification questions within five (5) working days, but does not undertake to do so. TASO may also decline to answer a question if it deems the question to be inappropriate. If TASO is unable to answer a question, this will be communicated.