



Request for Proposals (RFP) for Mathematics Content Development Services

Issued by: Smarter Balanced

Release Date: June 8, 2026 | Due Date: July 21, 2026

1. Introduction

Smarter Balanced invites qualified organizations to submit proposals to support mathematics content development services for the Smarter Balanced summative and interim assessments in grades 3 through high school. Smarter Balanced may select one or more suppliers through this RFP, depending on the responsiveness of proposals, demonstrated expertise, and project needs. This procurement aligns with University of California policies and procedures to promote transparency, competition, and fairness. The goal of this RFP is to secure services that produce high-quality, standards-aligned mathematics assessment content — including computer adaptive test (CAT) items, performance tasks (PTs), and mathematical stimuli — that supports valid and reliable measurement of student learning across the Smarter Balanced item pool.

2. Background and Objective

Smarter Balanced is a member-led consortium providing a comprehensive suite of standards-aligned tools and resources, including interim assessments, summative assessments, and Tools for Teachers in support of student learning in grades 3-8 and high school. Smarter Balanced mathematics assessments are designed to measure students' progress toward readiness for post-secondary success by emphasizing conceptual understanding, procedural skills and fluency, problem solving, modeling, and mathematical reasoning across grades 3 through high school.

As part of its ongoing assessment program, Smarter Balanced develops and maintains a comprehensive pool of mathematics assessment content. This RFP is intended to identify organizations with the content development, project management, quality control, and educator engagement expertise needed to develop mathematical stimuli, CAT items, and PTs; facilitate educator and subject-matter expert review meetings; and maintain content

within the Smarter Balanced Test and Item Management System (TIMS), in alignment with Smarter Balanced specifications and quality criteria.

The selected supplier(s) must be able to work securely, meet milestone-driven schedules, manage content through TIMS, conduct 100% quality-control review with bias and sensitivity analysis, and produce documentation sufficient to support Smarter Balanced review and peer review requirements.

3. Scope of Work

The RFP seeks to identify one or more organizations capable of providing comprehensive mathematics content development services aligned with Smarter Balanced specifications, claims, targets, and standards. This work includes:

- Identification and development of mathematical stimuli, including contexts, diagrams, geometric figures, tables, graphs, maps, function definitions, and data sets, aligned to Smarter Balanced Mathematics Stimulus Specifications
- Development of CAT items across Claims 1-4, including multiple choice, multiple select, equation/graph entry, evidence-based selected response, table interaction, match interaction, short answer, and constructed-response item types
- Development of PTs that elicit strategic problem solving, modeling, and reasoning using multi-step tasks with integrated stimuli, tools, and scoring rubrics
- Authoring and management of items, PT components, stimuli, metadata, and associated assets in TIMS, including correct rendering of mathematical notation (MathML/LaTeX) and accurate tool/calculator configurations
- Recruitment, training, and facilitation of educator and subject-matter expert review meetings, including claim-specific training, structured review activities, and documentation of feedback and revisions in TIMS
- Implementation of 100% quality-control, revision, and approval processes, including bias and sensitivity review, mathematical accuracy validation, and verification of usage rights for third-party assets
- Maintenance of a third-party asset log documenting sources, creators, and licenses for any externally sourced datasets, graphics, or imagery
- Documentation and reporting to support Smarter Balanced review, approval, and downstream use of developed content

All work must be conducted in compliance with Smarter Balanced test security protocols and confidentiality standards. Suppliers will be responsible for keeping all unreleased

materials secure, following multi-factor authentication and access control requirements, and adhering to secure storage and transfer practices.

All deliverables must align with Smarter Balanced Mathematics Content Specifications, Item and Task Model Specifications, Performance Task Specifications, Style Guide, Fairness Guidelines, Accessibility and Universal Design Guidelines, and metadata and blueprint alignment guidance.

4. Anticipated Benefits

This procurement will support the continued development and maintenance of a high-quality, standards-aligned mathematics item pool that informs teaching and learning across Smarter Balanced member states and jurisdictions. For Smarter Balanced and its members, this work promotes consistency, mathematical accuracy, and alignment to college- and career-ready standards across the assessment system. Selected supplier(s) will contribute specialized mathematics content development expertise to a multi-state assessment system that emphasizes quality, accessibility, and responsible implementation at scale.

5. Proposal Requirements

Proposals must address the components used for evaluation in this solicitation. At a minimum, respondents should provide complete responses to the required questionnaire sections below, along with any supporting documentation necessary to substantiate their approach, staffing, experience, and proposed pricing.

- Questionnaire: Organizational Experience
- Questionnaire: Test Security
- Questionnaire: General SOW Understanding
- Questionnaire: Project Management
- Questionnaire: Test and Item Management System (TIMS)
- Questionnaire: Quality Assurance
- Questionnaire: Content Development
- Questionnaire: Staffing and Organization
- Price Sheet

Where applicable, respondents should also be prepared to provide information on organizational capacity, relevant staff qualifications (including FTE allocations by role), quality-control processes, secure content handling procedures, subcontractor

management, AI tool use policies, and ability to meet fixed milestone dates for batch development and delivery.

6. Response Submission Requirements

Responses must be submitted electronically no later than Tuesday, July 21, 2026, at 5:00 p.m. Pacific Time.

Questions and Clarifications:

- Clarifying questions regarding this RFP must be submitted by Friday, June 26, 2026, at 5:00 p.m. Pacific Time.
- Smarter Balanced will engage with prospective bidders and publish responses to submitted questions between June 29 and July 6, 2026.

Submission Instructions:

Detailed submission instructions, including portal access and procurement contact information, are provided in the official solicitation materials.

Proposals must be submitted through the [University of California Public Bid website](#) (Reference: 003994-May2026 UCSC Mathematics Content Creation). For more information, visit the [University of California Procurement website](#).

7. Evaluation Criteria and Scoring Rubric

Responses will be evaluated using the following weighting structure. Each criterion will be scored on a 0-5 scale (5 = Exceeds expectations, no gaps; 4 = Meets expectations with minor gaps; 3 = Meets basic requirements; 2 = Significant gaps; 1 = Poor; 0 = No response). Section scores will be averaged and multiplied by the section weight to determine the weighted section score.

Category	Evaluation Focus	Weight
Organizational Experience	Experience developing large-scale mathematics assessment content aligned to college- and career-ready standards across grades and claims.	10%
Test Security	Policies and procedures for protecting confidential assessment materials, secure storage and transmission, staff confidentiality training, and incident response.	10%

Category	Evaluation Focus	Weight
General SOW Understanding	Understanding of scope and objectives, including the full mathematics content development lifecycle, intellectual property, third-party licensing/asset logs, and accessibility (508) requirements.	10%
Project Management	Approach for coordinating development activities, milestones, and batch deliveries; tracking item/stimulus-level status; and communication, documentation, and issue escalation with Smarter Balanced.	15%
Test and Item Management System (TIMS)	Experience using TIMS or comparable platforms; managing math metadata, notation rendering, assets, and documentation; and supporting validation and scoring workflows.	10%
Quality Assurance	Quality plan and 100% QC process; procedures for mathematical correctness, accessibility, bias/sensitivity review, cognitive load control; revision/turnaround SLAs; and AI tool use policies.	15%
Content Development	Procedures for stimulus identification and development; CAT item and PT development across Claims 1-4; educator recruitment, training, and review meeting facilitation; and batch-level submission, review, and approval.	20%
Staffing and Organization	Qualified project leadership and key personnel (including specialized math and technical roles), adequate FTE allocations, and staffing continuity and subcontractor management.	10%
Total		100%

Pricing will be evaluated separately through the Price Sheet submitted with the proposal and considered alongside the qualitative evaluation in the final selection decision.

8. Timeline and Key Dates

Event	Date	Notes
RFP Released	June 8, 2026	RFP released for bidding.
Questions Due	June 26, 2026	Organizations submit any clarifying questions about the RFP by this date at 5 p.m. Pacific.
SB Engagement in Vendor Q&A	June 29-July 6, 2026	Smarter Balanced engages with prospective bidders and publishes responses to submitted questions.
Response Submission Deadline	July 21, 2026	All required documents must be submitted electronically by this date at 5 p.m. Pacific.
Bid Evaluation and Feedback	July 22-August 5, 2026	Evaluation panel reviews proposals and documents scoring and feedback in the procurement tool.
Final Meeting with Panelists	Week of August 6, 2026	Evaluation panel meets with UCSC to finalize recommendations.
Notification of Selection(s)	Week of August 17, 2026	Smarter Balanced communicates decisions to all organizations that submitted a response.
Contract Negotiations / Onboarding	August-September 2026	Selected organization(s) begin discussions leading to potential agreements and onboarding.

Note: This timeline is subject to change at the discretion of Smarter Balanced.

9. Proprietary Information Disclosure

Organizations must clearly identify any information they consider proprietary. Proprietary information will only be shared with the evaluation committee convened specifically for this RFP. All other submitted information may be considered shareable with the state and territory educational agencies that compose Smarter Balanced's membership. Additionally, information may be disseminated in accordance with the University of California, Santa Cruz policy regarding public records disclosure.

10. Cost-Effective Procurement Support

This RFP is designed to support Smarter Balanced in identifying qualified supplier partners for mathematics content development and related services. Where permitted by applicable regulations and procurement rules, the outcomes of this RFP may also help inform efficient future procurement planning for related work.

11. Non-Binding Nature

This RFP is intended solely to identify potential organizations for contract award and does not obligate Smarter Balanced to enter into any agreement. Smarter Balanced reserves the right to reject any or all responses, request clarifications, negotiate with selected respondents, or pursue alternative procurement approaches as needed. All submitted materials may be used to support evaluation and planning activities, except for information properly identified as proprietary.