Texas Higher Education Coordinating Board

Data Modernization Project: Staff Augmentation DIR ITSAC Vendors

Questions and Answers #1

March 3, 2021

(These questions have been submitted by email or were taken from the February 26, 2021 webinar chat.)

Procurement-Related Questions:

1. When is the deadline for the Solicitation? As a result of the pre-bid conference vendor poll, the deadline has been extended to **11:59 p.m. CST/CDT, Monday, March 15, 2021.**

2. What is the final date for questions emailed after this meeting? The THECB will take questions until March 11, 2021, at 11:59 p.m.

3. Where can we find the solicitation? The original solicitation was emailed on Monday, February 22, 2021, and can now be found on the THECB Procurement website, https://www.highered.texas.gov/about-us/procurement/.

4. What should be included in the vendor's Proposal Plan?
   - ❑ Include one-page summary demonstrating the team's cohesiveness.
   - ❑ Identify proposed staff, by name, and state the roles that they will perform. The following areas shall be addressed for each proposed staff member, as applicable:
     - related/similar projects including the function/role fulfilled;
     - the number of years of professional experience the individual has in providing the services; and
     - resume demonstrating experience and qualifications.
   - ❑ Describe staffing methodology and include details regarding how workload will be balanced among proposed staff. Provide information on how additional personnel will be onboarded should a contractor be removed from the team.
   - ❑ Estimate cost of proposal.
   - ❑ Identify HUB subcontracting opportunities.
   - ❑ Provide five client references related to similar projects.
   - ❑ Provide complete client list for the last three years.

5. Will all the 21 candidates be selected from 1 vendor? It is the THECB's preference to work with one vendor, but we are open to issuing multiple awards.

6. Can we submit resumes only for selective positions? Yes, but the proposals must demonstrate how selected roles fit within the larger team.

7. Does vendor need to provide all the 21 resumes to be considered for this project? It is the THECB's preference to work with one vendor, but we are open to issuing multiple awards. The evaluation team will compare proposals based on the review criteria.

8. When will be the answers posted on website? THECB will post answers to questions on the THECB's Procurement site, https://www.highered.texas.gov/about-us/procurement/, and will email them to all 96 vendors. The THECB will take questions until March 11, 2021, at 11:59 p.m.

9. If I am a HUB subcontractor for one of the DIR vendors can I submit my proposal directly or I cannot submit the bid directly? Per DIR, only the vendor that received the DIR ITSAC contract may submit a bid.

10. Do we need to follow DIR pricing? Yes, vendor proposals should follow DIR pricing.

11. Is there a list of "prime vendors" available that we could review for partnering opportunities? The THECB has not highlighted prime vendors, but vendors can team up.

12. When did you send the solicitation, we did not receive it either? The Intent to Respond notice was emailed to contacts listed on the ITSAC vendor list. The subsequent solicitation was emailed to the 96 vendors that responded to the Intent to Respond.

13. If we did not submit intent, are we eligible to submit proposal? Only those ITSAC vendor that submitted an Intent to Respond by the deadline are eligible to submit a proposal.

14. Will THECB provide the list of companies in the proposal? The list of vendors eligible to respond is available in the Eligible Vendors spreadsheet, which is posted at https://www.highered.texas.gov/about-us/procurement/.

15. Would it be possible to get a copy of the presentation deck, please? The pre-bid webinar presentation is available on the THECB procurement website at https://www.highered.texas.gov/about-us/procurement/.

16. Will this also be posted on DIR portal? This proposal will not be listed on the DIR portal.

17. Are you sending the presentation to everyone who attended? The pre-bid webinar presentation is available on the THECB procurement website at https://www.highered.texas.gov/about-us/procurement/.

18. This is a short turn-around time to assemble a team of this size. Any chance that you can extend the proposal submittal deadline to give us more time to respond? The original submittal deadline was March 8, but has been extended to **11:59 p.m. CST/CDT, Monday, March 15, 2021.**

19. Can we take a resource from our Sub Vendors who is not Listed in Sub Vendors...if answer is no can we change the approved list? DIR must approval all HUB subcontracting changes.

20. Can we get all questions and answers asked by vendors and answers by Texas Higher education Coordinating Board? The questions entered in the pre-bid webinar conference chat are in this document.

21. Would you share the PowerPoint that is presented today? The pre-bid webinar presentation is available on the THECB procurement website, https://www.highered.texas.gov/about-us/procurement/.

22. Is there any chance for a one-week proposal submission deadline extension? The original submittal deadline was March 8, but it has been extended to **11:59 p.m. CST/CDT, Monday, March 15, 2021.**

23. In the submittal package do we have to merge all the resumes as a one document including the proposal and cost -please advise? See questions #4 on what should be included in the proposal.

24. Did you send anything else apart from the e-mail sent by Linda Natal on Thu 1/7/2021 3:19 PM? Should we make the proposal according to that e-mail only? The email on 1/7/21 was an Intent to Respond with a 1/15/21 deadline. Ninety-six (96) vendors submitted a response and are eligible for this solicitation.

25. Where on your website can we find the rfp and this presentation? The solicitation and pre-bid webinar presentation are available on the THECB procurement website at https://www.highered.texas.gov/about-us/procurement/.

26. We did not receive solicitation documents. we received initial email "intent to respond" which we responded before deadline. is solicitation document posted online or we will be receiving through email? The solicitation was emailed on February 22 to the 96 eligible vendors. The solicitation and pre-bid webinar presentation are available on the THECB procurement website at https://www.highered.texas.gov/about-us/procurement/.

27. We submitted our Intent but have not received the solicitation email? Please be sure the email address listed on the DIR ITSAC contacts is up to date. The solicitation and pre-bid webinar presentation are available on the THECB procurement website at https://www.highered.texas.gov/about-us/procurement/.

28. If our firm, Access Sciences, is a Texas HUB, how do we notify possible primes of our capabilities? We have SMEs for this project but cannot provide the full spectrum of resources. The list of 96 vendors eligible for this solicitation can be found on the THECB procurement website, https://www.highered.texas.gov/about-us/procurement/

29. When you said you sent out the solicitation, are you referring to the email distributed in the beginning of January? Was there a separate email distributed after the intent to respond deadline (i.e., January 15)? The solicitation was sent on February 22, 2021, to the 96 vendors who submitted an Intent to Respond by the deadline.

30. Can we get a recording of this session or answers to all questions asked? The presentation can be found on the THECB Procurement website, https://www.highered.texas.gov/about-us/procurement/. The questions entered in the pre-bid conference chat are in this document.

31. Will the individual requirements for all 21 roles be sent via email to the vendors (along with their respective NTE)? The requirements for the 21 positions are included in the solicitation, which is posted at https://www.highered.texas.gov/about-us/procurement/.

32. Genius Road LLC is a TX HUB certified vendor that specializes in staffing many of the required roles, however, we do not have the capacity to staff all 21. Is there a list of "prime vendors" available that we could review for partnering opportunities? We encourage vendors in this situation to review the

list of the 96 eligible vendors for a possible collaboration. The list of Eligible Vendors can be found on the THECB Procurement website, https://www.highered.texas.gov/about-us/procurement/.

33. Can we take a resource from our Sub Vendors who is not Listed in Sub Vendors Hub Contracting plan...if answer is no, can we change the sub vendors Hub contracting plan? DIR must approve all changes to a vendor's HUB Subcontracting Plan.

34. Is HUB subcontracting a factor in the scoring criteria? The THECB evaluation team plans to fairly and objectively select the vendor that provides best value to the state.

Technical Project Questions:

35. What is the expected duration of the project? The expected duration of the project is 12 months.

36. What are your scoring criteria for these responses?
The agency will consider multiple factors when evaluating proposals, including but not limited to the vendor's ability to assemble a qualified team, estimated cost, relevant experience, track record of delivering quality services, etc. Vendors should include in proposals:

- ❑ Include one-page summary demonstrating the team's cohesiveness.
- ❑ Identify proposed staff, by name, and state the roles that they will perform. The following areas shall be addressed for each proposed staff member, as applicable:
  - related/similar projects including the function/role fulfilled;
  - the number of years of professional experience the individual has in providing the services; and
  - resume demonstrating experience and qualifications.
- ❑ Describe staffing methodology and include details regarding how workload will be balanced among proposed staff. Provide information on how additional personnel will be onboarded should a contractor be removed from the team.
- ❑ Estimate cost of proposal.
- ❑ Identify HUB subcontracting opportunities.
- ❑ Provide five client references related to similar projects.
- ❑ Provide complete client list for the last three years.

37. What is the ETL tool selected for the project? The agency has selected Microsoft Azure for this project. Azure offers a variety of tools to help handle ETL. We are exploring and reviewing the different services and components, including but not limited to Azure Data Lake Store, Azure Data Factory, Azure SQL Database, Azure Analysis Services, and others.

38. Are vendors expected to fully manage the project from end-to-end? This is a staff augmentation services contract. The agency project manager will manage the project deliverables.

39. Is it a requirement to assemble the team prior to the contract award? Yes, it is a requirement to assemble the team prior to the contract award.

40. What is Interview Process? Phone/Web? Interviews will be conducted virtually.

41. Where does the Project Management fall under? THECB? or vendor? THECB will be responsible for project management.

42. Can the project team be remote or is there an expectation of on-premises work beyond COVID? Based on the current plan, the project team will be working remotely.

43. Is there an architect already assigned to the project or should we consider providing the architect? A THECB architect has been assigned to the project.

44. Will we need to provide data scientists or are there data scientists already on the team? There is no need for vendors to provide data scientists.

45. What are the vendor responsibilities during project execution outside of resource quality control management? As stated in the "Request for Proposal - THECB Data Modernization Project - Staff Augmentation" document:

    "Acceptance Criteria

    - The Vendor is required to provide the Agency project manager with weekly written progress reports of this project. These are due to the Agency project manager by the close of business on Friday each week throughout the life of the project.
    - The progress reports shall cover all work performed and completed during the week for which the progress report is provided and shall present the work to be performed during the subsequent week.
    - The progress report shall identify any problems encountered or still outstanding with an explanation of the cause and resolution of the problem or how the problem will be resolved.
    - The Vendor will be responsible for conducting regular status meetings with the Agency project manager. The meetings will be held once every other week - at a time and place so designated by the Agency project manager - unless revised by the Agency project manager. The meetings can be in person or over the phone at the discretion of the Agency project manager.

    Team Members:

    The vendor is responsible for providing qualified and professional contractors to support the agency data modernization initiative. In case of non-performance, the vendor will find a new contractor with like or better skills within two weeks to help minimize the impact on the project timeline."

46. What is volume of the data expected to be ingested and stored on Azure Storage? How many data refresh cycles per day you are looking for? Institutions currently submit data to THECB according to the CBM reporting schedule. Change does not happen daily. During each reporting cycle, less than 1 TB of data is expected to be ingested and processed through the new data pipeline in Azure.

47. Is there a need for business analysts to do any requirements gathering or validation? There is not a need for business analysts to do requirements gathering or validation. Details on all positions are provided in the "Request for Proposal - THECB Data Modernization Project - Staff Augmentation" document located on the THECB Procurement website at https://www.highered.texas.gov/about-us/procurement/.

48. How THCEB establish oversight distinction between vendor and agency? The THECB project manager will oversee the overall implementation roadmap, timeline, and sprint backlog planning. The vendor is responsible for providing qualified and professional contractors to support the agency data

modernization initiative. In case of non-performance, the vendor will find a new contractor with like or better skills within two weeks to help minimize the impact on the project timeline.

49. Do we have to submit resumes of all key personnel for each role with the proposal? One for each role or multiple candidates? See answer under question 94.

50. What is your expectation of the PM if THECB is managing the project? The Project Manager role specified in the RFP is to help backfill the Senior Project Manager position. The contractor PM will be working on projects assigned by the agency team lead.

51. Would vendors need to provide a project manager in addition to the 21 resources? Vendors do not need to provide an additional project manager. The vendor is responsible for providing qualified and professional contractors to support the agency data modernization initiative. In case of non-performance, the vendor will find a new contractor with like or better skills within two weeks to help minimize the impact on the project timeline.

52. Is vendor PM billable? Vendors do not need to provide a project manager to manage the 21 contractors. The agency is looking for a senior PM to backfill an existing PM position in the IT department. The senior PM will be working on projects assigned by the IT department.

53. Will THEC be open to consider candidates who are non-local (not residing in Texas)? THECB will consider candidates who are not residing in Texas; however, we will not consider candidates who reside or work outside the US.

54. Will Agency Be providing the hardware? The agency will issue laptops for the contractors.

55. Is the architect from THECB or ITSAC contractor if contractor then which ITSAC vendor? THECB has assigned an architect to this project.

56. What is the confidence level that the POC will end in success (confirming the technical architecture)? Is there a possibility the technical architecture could change? The high-level architecture design has been finalized. The goal of the POC is to compare a few different components and services to build out the details of the implementation strategy.

57. Can you share the selection criteria before the deadline or ASAP? This will help to put together proposal that meet the expectations. The agency will consider multiple factors when evaluating proposals, including but not limited to the vendor's ability to assemble a qualified team, estimated cost, relevant experience, etc. Vendors should include in proposals:
    ❑ Include one-page summary demonstrating the team's cohesiveness.
    ❑ Identify proposed staff, by name, and state the roles that they will perform. The following areas shall be addressed for each proposed staff member, as applicable:
        • related/similar projects including the function/role fulfilled;
        • the number of years of professional experience the individual has in providing the services; and
        • resume demonstrating experience and qualifications.
    ❑ Describe staffing methodology and include details regarding how workload will be balanced among proposed staff. Provide information on how additional personnel will be onboarded should a contractor be removed from the team.
    ❑ Estimate cost of proposal.
    ❑ Identify HUB subcontracting opportunities.

❏ Provide five client references related to similar projects.
❏ Provide complete client list for the last three years.

58. When you say, "How Cohesive the Team is", which has been mentioned a few times...Is your preference to take an existing team or existing teams from a vendor? Each vendor should describe its staffing methodology and include details regarding how workload will be balanced among proposed staff. A vendor should provide information on how it will onboard additional personnel should a contractor be removed from the team.

59. Will Board provide laptops or contractors can log in remote using their laptops? Yes. The agency will provide laptops to contractors.

60. Will GFE be provided to the contract staff? The agency will issue laptops to the contractors.

61. How does THCEB establish oversight distinction between vendor and agency? See answer under question 48.

62. Which vendor supported the POC process? Alvarez & Marsal and Microsoft Consulting Services are supporting the POC process.

63. Is vendor PM billable? See answer under question 52.

64. Snowflake or Synapse? It is difficult to find resources with experience in both? also, the architecture will change based on this decision? The high-level architecture design has been finalized. If a vendor has difficulty finding resources with experience in both, the agency would consider candidates with sufficient experience with Azure Synapse.

65. Since this is not a DBITS how the cost will be evaluated? The resources will be billed on an hourly basis, correct? And this is not a fixed price contract? Please see answer under Question 79.

66. Should all 21 be onshore resources? Are remote resources OK? All resources should be in the US. At this point, we expect all resources to work remotely.

67. Will all resources onboard at the same time? THECB expects all resources to onboard at the same time.

68. Assuming we will be managing our resources i.e., like a managed T&M model - pls confirm. The agency project manager will assign tasks to the resources and manage their time. The vendor is responsible for providing qualified and professional contractors to support the agency data modernization initiative. In case of non-performance, the vendor will find a new contractor with like or better skills within two weeks to help minimize the impact on the project timeline.

69. Do we need all the resources to be onsite from day one? Any remote flexibly? THECB expects all resources to onboard at the same time. At this point, we expect all resources to work remotely.

70. Is it expected that we provide the same resources that we propose in the RFP? THECB expects the resources proposed to be the ones provided.

71. Two positions do not have any job description - Senior Web Developer and Senior Data Engineer. What kind of resources should we submitting? The Senior Web Developer should have skills in

developing Power BI dashboards, web server development, and content and document management. The Senior Data Modeler should have skills and experience building data analytics pipelines using Azure Data Lake Gen2 (Blob Storage), Azure Data Factory (Pipelines and Data Flows), Azure Data Catalog, Azure Event Grid, Azure Service Bus, Azure SQL Database, and Synapse Analytics.

72. Would vendors need to provide a project manager in addition to the 21 resources? Please see answer under question 51.

73. Does the resource need to be in the US, or they can be offshore? The resources need to be in the US.

74. Two positions do not have any job description - Senior Web Developer and Senior Data Engineer. What kind of resources should we submitting? See answer under question 71.

75. Can you share the resource plan to onboard resources? Twelve of the contractors will be working directly on the data modernization project and nine of the contractors will be backfilling existing IT positions in the agency.

76. Will the resources be working remotely or onsite? remotely.

Pricing and Miscellaneous Questions:

Table 1: DIR ITSAC NTE Rate Table

Category	Title	Level	NTE Rate
Applications/Software Development	Systems Analyst	3	$144.24
Applications/Software Development	Developer/Programmer Analyst	3	$104.50
Applications/Software Development	Software Developer	3	$144.24
Data/Database Administration	Data Analyst/Report Writer	2	$90.63
Data/Database Administration	Data Modeler	3	$152.32
Data/Database Administration	Data Scientist (Big Data Engineer)	2	$112.00
Data/Database Administration	Data Scientist (Big Data Engineer)	3	$142.24
Web Development	Web Developer	3	$123.38
Quality Assurance (QA) and Testing	QA Associate/Analyst	3	$75.48
Networking/Telecommunications	Network Engineer	3	$127.59
Project Management	Project Manager	2	$119.20

Table 2: Mapping between the Role and Title listed in the RFP and the DIR ITSAC
Level/Title/NTE Rate:

Number	Roles/Title	DIR ITSAC Level/Title/NTE Rate
2	Senior Software Developer	Senior Software Developer - *Level 3 – Software Developer – NTE Rate: $144.24* 2 senior software developers with web application development skills in C#.NET, Azure App Service, Azure Functions, Azure API Management, Cosmos DB and integration with Azure Active Directory B2C.
4	1 Senior Web Developer 3 Data Analyst/Report Writers	Senior web developer – *Level 3 – Web Developer – NTE Rate: $123.38* Data analyst/report writers – *Level 2 – Data Analyst/Report Writer – NTE Rate: $90.63* With skills in developing Power BI dashboards, web server development, and content and document management.

3	1 Senior Data Modeler 1 Senior Data Engineer (Level 3) 1 Data Engineer (Level 2)	Senior data modeler – *Level 3 – Data Modeler – NTE Rate: $152.32* Senior data engineer - *Level 3 – Data Scientist (Big Data Engineer) – NTE Rate: $142.24* Data engineer (level 2) – *Level 2 – Data Scientist (Big Data Engineer) – NTE Rate: $112.00* With skills and experience building data analytics pipelines using Azure Data Lake Gen2 (Blob Storage), Azure Data Factory (Pipelines and Data Flows), Azure Data Catalog, Azure Event Grid, Azure Service Bus, Azure SQL Database, Synapse Analytics
3	Senior Developers	Senior developers – *Level 3 – Developer/Programmer Analyst – NTE Rate: $104.50* With web application development skills in C#.NET, Azure App Service, Azure Functions, Azure API Management, Cosmos DB and integration with Azure Active Directory B2C.
5	Senior Developers	Senior developers – *Level 3 – Developer/Programmer Analyst – NTE Rate: $104.50* With experience with C# and .Net MVC5, WebAPI, JQuery and object-oriented design. Working experience in Azure Cloud environment and Visual Studio 2017. Working experience with MS SQL and SQL Server Management Studio. Working experience with application design, development, and support.
1	Project Manager	Project manager – *Level 2 – Project Manager – NTE Rate: $119.20* with more than 7 years of experience managing projects in IT environment. Experience with Microsoft Office products, effective written and verbal communication, and problem-solving skills. Works under limited supervision with considerable latitude for the use of initiative and independent judgment. Implementation of information systems, system integration and project delivery experience. Experience working with external vendors and/or Quality Assurance efforts a plus.
1	Senior Quality Assurance Analyst	Senior quality assurance analyst – *Level 3 – QA Associate/Analyst - NTE Rate: $75.48* With more than 4 years of working experience with different types of testing in Functional, Integration, API, Regression, Security and Database Testing. Working experience with Test management and defect tracking tools such as TFS, JIRA or Similar Working experience with basic SQL skills and use of SQL Server.
1	Senior System Analyst	Senior system analyst – *Level 3 - System Analyst – NTE Rate: $144.24* With technical experience in applications software development and systems analysis. Competent to work at a high technical level for most phases of applications systems analysis and programming activities. Experience in integration/customization of commercial off-the-shelf (COTS) products and Content Management System (CMS) development and maintenance. Proficient in Hypertext Markup Language (HTML), Extensible

		Markup Language (XML), Java, C/C++, or other application engines as required.
1	Senior Network Engineer	Senior network engineer – *Level 3 – Network Engineer – NTE Rate: $127.59* With experience performing advanced computer systems architecture, design, and analysis work in an Azure and Windows environment. Architecting, design, and implementing new systems or to improving existing systems. Experience leading cloud infrastructure adoption and migration efforts.

77. Do we need to follow DIR pricing? As stated by DIR representatives during the pre-bid webinar, this is a great opportunity for ITSAC vendors. Put your best proposal forward with a well-qualified team, with competitive pricing. Remember NTE rates are just that - Not To Exceed. The NTE rates should not be your default pricing.

78. Is pricing fixed price or time and materials? This is a time and materials contract. Contractors are expected to work 40 hours per week.

79. Since this is not a DBITS how the cost will be evaluated? The resources will be billed on an hourly basis, correct? And this is not a fixed price contract? This is not a fixed price contract. The resources will be billed on an hourly basis.

80. Will the budgeted rates and hours per role be sent out to vendors? See Tables 1 and 2.

81. What is the DIR level for the report writers? See Tables 1 and 2.

82. What is the DIR level for the Data Modeler? See Tables 1 and 2.

83. How do we map "senior level" to DIR level? DIR pricing does not categorize them in that manner. Level 2 or Level 3? See Tables 1 and 2.

84. Should we follow the DIR rate card for the roles? Yes, please. See Tables 1 and 2 for details.

85. Certain roles do not fit existing categories within DIR NTE price sheet. Could you please advise on those rates? See Tables 1 and 2.

86. Please advise the level for few roles as its listed to identify the NTE rate. See Tables 1 and 2.

87. Clarification on the NTE rates for each role will be very helpful. See Table 1.

88. Is Board expecting vendors to come lower than ITSAC NTE rates? As stated by DIR representatives during the pre-bid webinar, this is a great opportunity for ITSAC vendors. Put your best proposal forward with a well-qualified team, with competitive pricing. Remember NTE rates are just that - Not To Exceed. The NTE rates should not be your default pricing.

89. From the list few of the roles/titles has not been defined with the level to understand the rate from the chart. Please see Tables 1 and 2. Here is the link to the hourly rate document published by DIR:

90. One of the requirements for the Senior Software Developers include experience with Cosmos DB and integration with Azure Active Directory B2C. Is this a preferred requirement, if not, what is the minimum # of years you would consider? These are required skillsets. The agency is looking for a senior-level developer who has had experience working with Cosmos DB and Azure AD B2C.

91. What is volume of the data expected to be ingested and stored on Azure Storage? How many data refresh cycles per day you are looking for? See answer under question 46.

92. Is outsourcing to offshore permitted? Offshore outsourcing is not permitted due to data classification.

93. There are 2 positions without a job description. Senior Web Developer and Senior Data Modeler. What are the skills we are looking for? See answer under question 71.

94. Do we have to submit resumes of all key personnel for each role with the proposal? One for each role or multiple candidates? The agency is asking the vendors to assemble the best team. Vendors should include resumes of all the candidates in their proposals.

95. Are all 21 job descriptions in the RFP? The job descriptions are included in the RFP. Please see Tables 1 and 2 for details.

96. The POC is in progress, not complete yet, suggesting that the solution has not yet been proven. What is the confidence level that the POC will end in success (confirming the technical architecture)? Is there a possibility the technical architecture could change?
See answer under question 56.

97. What is the DIR category and Title for the Data Engineer Role? See Tables 1 and 2.

98. How you plan to evaluate cost for vendor proposal? See answer under question 57.

99. Certain roles do not fit existing categories within DIR NTE price sheet. Could you please advise on those rates? See Tables 1 and 2.