

Texas Higher Education Coordinating Board Request for Offers (RFO)

HUMAN-CENTERED DESIGN AND WEBSITE DEVELOPMENT FOR
“MY TEXAS FUTURE” PORTAL
RFO No. 781-2-25867

Questions and Answers #2

December 3, 2021

48. The title indicates development of a website, but the Scope of Work focuses on the portal development. Is there a separate website that needs to be developed or is it just the portal?

Response: The student portal is the website.

49. Can you provide any information on the budget for this project?

Response: Please see the response to question number 5.

50. Will branding/visual materials be provided by your team or will the vendor need to provide graphic design work?

Response: THECB will provide branding guidelines, but we expect the selected vendor to provide visuals, photography, etc. for the student portal.

51. Will any existing information need to be migrated for this portal/project? If so, can you provide any specific numbers of what needs to be done?

Response: No. THECB will provide data files as needed.

52. With respect to the launch deadline, why is August 2022 a significant date? In other words, is the deadline flexible? What happens if you miss this deadline?

- a. Please note: the RFO has the selected vendor coordinating with the THECB Tri-Agency Workforce Initiative partners. Stakeholder management is critical for the perception of success within THECB and its partners. Stakeholder buy-in requires input gathering and listening to feedback. This takes time in terms of calendar days, and only allowing for 7 months on a

significant, greenfield project adds substantial risk of delivering disappointment if we don't make time to listen to the stakeholders."

Response: The deadline is firm as it is directly tied to other projects and a particular funding stream.

53. With respect to the milestone deadlines listed in Section 3.5 — the timeline makes a number of assumptions about how quickly a vendor needs to move to design comps. How flexible is that timeline?

Response: There is flexibility in the milestone dates, provided the final delivery date remains intact.

54. Who are the people on your core team? What are their roles and responsibilities? What percentage of their time will be dedicated to this project? What superpowers/abilities can we leverage on this project?

Response: We have people across several departments who will be working closely with the selected vendor; however, we anticipate guidance from the selected vendor as to who and which roles are needed to support this project. We are open to specific recommendations.

55. Is there an incumbent vendor responding to this opportunity?

Response: No.

56. Please tell us about the stakeholders at your organization, how large is the stakeholder group?
- a. Is there a RACI chart or steering committee set up to manage them?
 - b. How do you envision the selected partner interacting with your stakeholders?

Response: We are seeking input from a vendor on how best to structure interaction with internal and external stakeholders. We will share additional details on the team and the associated RACI chart with the selected vendor.

57. What is the budget for this project? Knowing your budget is critical to help us right-size the project plan.

Response: Please see the response to question number 5.

58. So we can plan our resources accordingly, what is your timeline for selecting finalists? When do you expect to schedule presentations?

Response: Please see section 9.2 of the RFO for THECB's calendar of events.

59. Are there any initiatives happening that this project is dependent on or related to (i.e, are they also doing a rebrand exercise or some other initiative that this project might need to wait for?)

Response: There are several inter-related projects across the agency that support similar student groups; however, these projects should not adversely impact the timeline. Similar teams will be working across this project, the College & Career Advising project, and the CRM project. This will allow us to ensure that we are working collaboratively and staying on track.

60. Can you please confirm that My Texas Future is a new property? What is its anticipated URL?

Response: Yes, the My Texas Future is new, and the URL has already been purchased by THECB.

61. This project will require significant resources from THECB in terms of cost, attention, and opportunity cost. Why is this project important? What research has THECB done, or feedback you have received from your users, that makes THECB believe that My Future Texas is an important initiative that will help drive the 60x30TX plan?

Response: Please see the introduction included in the RFO.

62. Has any user research been done to inform this RFO? Is the team open to user research during discovery phase to validate the user needs and priorities?

Response: Yes, user research has already been conducted and we would be open to additional testing, provided it does not adversely impact the stages and delivery date.

63. With respect to the milestone deadlines listed in Section 3.5 – the timeline makes a number of assumptions about the selected vendor's process. How flexible is your milestone timeline?

- a. For example, you have a milestone of ""Deliver Design Mock-ups"" set for March 15, 2022. That's roughly 7–8 weeks from contract award, and likely only 5 weeks from project kickoff. In order to create effective designs, you need strategy and IA need to be established before you start creating page comps. It's exceedingly unlikely that a large organization with significant stakeholder groups — like THECB — will be able to get to completed design comps in five weeks. We would recommend resetting the expectation to 3–4 months.

Response: We are open to a suggested timeline from the vendor, provided it does not compromise the final delivery timeline.

64. WordPress is typically hosted on a LAMP/LEMP stack, and Azure only has a 1% market share. Why was Azure chosen for the hosting platform? And, is there an opportunity to host this WordPress site on a more widely supported environment?

Response: Azure is the cloud environment used by the agency. Auto-scaling and load balancing are just a few of the benefits of running WordPress in Azure. In addition, the agency is required by statute to run and host its websites in the state data center services environment.

65. The RFO refers to "audiences" (plural), but only identifies "adult learners" as a primary audience. Further, Section 3.4 of the RFO requires that respondents "Provide a proposal for how to sequence future phases of work to expand the audience of the My Texas Future portal beyond adult learners."
 - a. Please list all the audiences THECB has currently defined. And, please list — separately — the audiences that THECB is looking to reach.

Response: Adult learners encompasses a large group, including those who have stopped out, veterans, families of veterans, etc.

66. FERPA compliance is listed as a requirement on this project. Other than meeting WCAG 2.1 AA, are there any other compliance requirements?

Response: See the response to question number 73 regarding security requirements.

67. Why was WordPress selected as the CMS technology of choice for THECB?

Response: THECB is moving towards a common CMS across the agency. WordPress has already been implemented and is being leveraged in various ways.

68. Can you describe what you envision will be the top 3 to 5 user journeys an adult learner might take within the new My Texas Future portal? We are interested in what might motivate an adult learner to your new portal. Please don't include utility journeys, like retrieving a password.

Response: We are working with a vendor who is creating this content. It will be completed mid-December and will be shared with the selected vendor.

69. With respect to your adult learners, can you please break down the percentages of users seeking a (1) certificate, (2) associate, (3) bachelor's, or (4) master's degrees? If this isn't a good way to categorize/prioritize audiences within adult learners, how does THECB categorize your adult learner audiences?

Response: Please see the response to question number 65.

70. What CRM is THECB using for "identity management."

Response: Please see the response to question number 16.

71. Are there any additional integrations with other websites or applications?

Response: Please refer to sections 3.2.5, 3.2.7, and 3.3 (Technology & Engineering) in the RFO.

72. Are there any preferred languages or technology stacks that are preferred on the back-end, if the need arises? (e.g. LAMP stack, IIS and .NET, etc.)

Response: The preference would be “.Net and C#.”

73. Are there any defined security standards that you need to meet with this project, or are you okay going with our recommendations? (e.g. Content-Security-Policy standards, intensive code-review processes, etc.)

Response: Yes.

- **Ensure that web application development is based on secure coding guidelines, such as the guidelines published by the Open Web Application Security Project (OWASP);**
- **Ensure proper information security controls are in place, such as Title 1 Texas Administrative Code Chapter 202, Texas**

Cybersecurity Framework standards, and other applicable laws, including FERPA;

- **Vendor staff will have to complete the required cybersecurity training before obtaining access to the agency's system and data; and**
- **The new system will have to pass a web application penetration test before go-live. All critical-, high-, and medium-level vulnerabilities identified during the test must be remediated prior to the go-live, unless an exception is approved and granted by the agency's Information Security Officer (ISO) or the agency Chief Information Officer (CIO).**

74. Is hosting in scope of this project?

Response: No.

75. Does THECB intend to utilize any additional external APIs or data feeds (courses, faculty profiles, events, research publications, etc.) on the portal?

Response: It is possible that other external APIs will be leveraged, such as mapping or the CIP/SOC crosswalk.

76. Does THECB intend to use Wordpress as the CMS for the portal?

- If not, does the THECB have a preference for a particular CMS platform? Is there a preference for open source (e.g. Drupal) or proprietary (e.g. Cascade or Modern Campus) CMS?

Response: Yes.

77. Is there any existing content that will need to be migrated into the portal?

- If so, approximately how many pages of content and how many files will need to be migrated?

Response: No.

78. Is content creation in any form expected to be in scope for this project? (e.g. copywriting, videography, photography). If yes, please specify.

Response: Yes, we expect the selected vendor to include photography/graphics/videography in the scope of the project. Additionally, we anticipate a need for high level copyediting of web

content to align with quality UI/UX standards, but we do not expect the selected vendor to perform substantial custom content development, i.e., producing new articles.

79. Can THECB please specify content strategy expectations beyond the detail provided in 3.1?

Response: We have outlined the content strategy expectations in section 3.1 of the RFO.

80. Who on the client team will ultimately be responsible for the creation of new content and the consolidation/editing of existing content?

Response: We anticipate a need for high level copyediting of web content to align with quality UI/UX standards, but we do not expect the selected vendor to perform substantial custom content development, i.e., producing new articles.

81. How large will the CMS user base be (i.e. number of users)?

Response: THECB currently has 50 content managers/contributors within the agency.

82. How large does THECB anticipate the portal to be (total number of pages and files)?

Response: We are open to size, provided it meets the requirements of the RFO.

83. Is it expected that design workshops will be completed virtually or in person?

Response: We are open to either virtual or in-person workshops, understanding that virtual provides easier scheduling opportunities.

84. How many templates does THECB anticipate to be in scope for this portal?

Response: We anticipate the amount needed to meet the needs of the project as outlined in the RFO.

85. Is the THECB open to a modular design system and pattern library?

- If not, is there an existing design system and pattern library to pull from?

Response: Yes, we are open to recommendations from the vendor.

86. Will portal modules (like an event calendar) need to be included in our design process?

Response: No.

87. Are there any other anticipated modules or integrations that the THECB wants to implement in this portal? (this can influence our the design approach)

Response: Please see the response to question number 71.

88. Should vendors include pricing for videography, photography in the production costs of their bid?

Response: Yes.

89. Does the THECB have branding guidelines?

Response: Yes, these will be shared with the selected vendor.

90. Is it expected that design workshops will be completed virtually or in person?

Response: See the response to question number 83.

91. What is the desired timeline for this project?

Response: Please refer to the timeline provided in the RFO.

92. What is the approximate budget for this project?

Response: Please see the response to question number 5.

93. Are we correct in saying that THECB expects the pricing proposal to be deliverable based as opposed to service based? As such, vendors shall use the deliverables listed in section 3.4 as guidance on how to format their pricing proposal.

Response: Yes.

94. Shall vendors also present the approximate total bid for this project as a sum of all deliverable costs?

Response: Yes.

95. As a project schedule is provided in section 3.5, are vendors correct in assuming that a project schedule is not required as part of their response?

Response: Yes.

96. Is stakeholder engagement anticipated to be conducted remotely? Otherwise, shall vendors price out travel expenses?

Response: Yes, remote meetings are anticipated. And all expenses should be considered in the total bid for the project.

97. Are vendors in section 10.2.4 THECB states “The letter must also include ‘full acceptance of the terms and conditions described in this Request for Offers’” but then states any “any exceptions to this RFO must be specifically noted in the letter.” As such, if vendors desire to suggest amendments to the terms, are they permitted to do so without declaring full acceptance of the terms? And, if so, will they still be deemed responsive?

Response: Pursuant to section 10 of the RFO, the transmittal letter must include “full acceptance of the terms and conditions described in this Request for Offers.” Possible amendment(s) to any terms and conditions of the anticipated Contract may be discussed with the selected vendor during the contract formation stage.

98. Regarding point 13, under the heading ‘For Technology & Engineering’ (page 7). Could you please clarify how you expect the Awarded Respondent to meet this requirement? E.g. will there be a requirement to undertake manual data-loading?

Response: Selected vendor will connect to existing the THECB SSO pattern and call user ID data as needed so that user work in the portal (such as searches) can be connected to their account. No manual data-loading will be required.

99. '3.5 Project Schedule' references a 'Comparison Tool'. Please could you confirm what this is, as it doesn't appear to be mentioned elsewhere in the documents?

Response: This is the career exploration/pathways tool as referenced elsewhere. The goal is to build a way for users to explore careers and educational pathways and compare their options. This may be accomplished with a new offering built from scratch for My Texas Future, or by incorporating an existing prototype that THECB has been developing.

100. '3. Scope of Work' states that portal development and build should be completed 'Within THECB's Data Services Center (DCS) system environment, engineer and build a product in parallel with design research...'. Is the expectation here that the Awarded Respondent will just use THECB's tools or work physically within THECB's environment?

Response: We expect the selected vendor to use relevant THECB tools.

101. What is the minimum percentage of this contract that should be subcontracted through the HSP?

Response: Please see the response to question number 21.

102. Section 3.1.4 Will THECB accept pre existing tools that have been developed and that can be customized to meet the exact criteria and needs of the request?

Response: Based on our initial landscape analysis, we do not anticipate an out of the box solution; however, we are open to vendor recommendations.

103. Section 3.1.6.1 Currently, ADVi's text-message-based response is designed to only chat with those who have identified as students - High School and current college students. Other options that include Former College Student, Parent or Guardian, High School Counselor, Other - is there an opportunity to improve the ADVi tool to better align with the platform?

Response: THECB is currently running a campaign for individuals with some college and no credential. There is flexibility in defining the campaigns as we see fit, with different audience groups as the target.

104. Section 3.1.6.1 How will THECB be restructuring ADVi to be able to address the main audience of adults who have stopped out of higher ed, displaced workers, military personnel, and family? "

Response: THECB is currently running a campaign for individuals with some college and no credential. There is flexibility in defining the campaigns as we see fit, with different audience groups as the target.

105. Section 3.1.6.2 Which entity will be managing/employing "human advisors" and student counselors? Will the Awarded Respondent be responsible for sourcing advisors and training?

Response: The awarded respondent will not be responsible for sourcing advisors and training. THECB currently hires and manages virtual advisors. We are open to exploring a different approach to this model which may leverage the capacities of other entities with vested interests to support the target users of My Texas Future.

106. Section 3.1.7 Will the proposals for future phases of development for additional audiences be awarded to the same respondent who is awarded the first phase project without contest?

Response: Each solicitation is reviewed independently.

107. Section 3.1.7 If respondent's tools already have future phases in the current core product, can the respondent provide this information?

Response: No, we ask that you respond only to the provisions within the RFO.

108. Section 3.2 Can the extensive research on the intended users, tools needed for them to succeed be shared with respondents prior to the RFO submission date?

Response: No, we will be sharing all research and resources with the selected vendor.

109. Section 3.2 What staffing resources will THECB make available to the awarded recipient, if any, from colleges and institutions, THECB and any other stakeholders? Who shall be responsible for utilization once the product is implemented.

Response: We will provide all research and resources to the selected vendor. We fully expect the selected vendor to engage with various internal and external stakeholders, inclusive of those at state institutions

110. Section 3.2.1 Who are the other design experts contracted by THECB that the Awarded Respondent can expect to collaborate with and what capacity?

Response: Please see the response to question number 23 for additional information on the other initiatives. We will provide introductions to our current partners to the selected vendor, along with all content created by these vendors.

111. Section 3.2.8 Is THECB open to working with, modifying or adapting preexisting platform design (commercially available), schema and user interface and experience to expedite design phase?

Response: Yes, we are open to recommendations from vendors.

112. Section 3.3.2 Will THECB be reliant on Awarded Respondent's subscriptions to third party tools like Jira? If so, this should be incorporated into the proposed budget.

Response: Please include any and all anticipated costs in the budget proposal.

113. Section 6 If there is an existing platform that is proprietary but that accomplishes all of THECB's goals, can the awarded respondent account for ongoing hosting, maintenance and licensing of the technology post September 30, 2022? How do we price out a licensing fee?

Response: No.

114. Section 6 Who will be operating the platform after the contract completion date of September 30, 2022?

Response: THECB.

115. Section 6 Upon product deliverance, what are the implementation opportunities for AR. (marketing, hosting, and maintenance)

Response: Our internal marketing team will be leading the Go To Market strategy.

116. The THECB RFI stated that the platform must be launched by April, 2022. What was the significance of the April, 2022 date?

Response: Please refer to the dates and timeline included in the RFO, which calls out an August 2022 launch date.

117. Regarding a milestone delivery component (Comparison Tool) is not defined in the RFO outside of the deliverable deadline table: Can you elaborate on what the Comparison Tool entails, what its functionality needs to be within the framework of the RFO?

Response: Please see the response to question number 99.

118. Are there currently outside partners or affiliations that can be anticipated to have involvement with this project?

Response: Please see the response to question number 23.

119. What are your Go to Market strategies once the product has been delivered?

Response: Our marketing team will work collaboratively with the selected vendor to ensure the strategies align with the My Texas Future launch. THECB will share the proposed outreach strategies with the selected vendor.

120. What level of institutional involvement can we anticipate to have presence on the platform? How many anticipated users should be accounted for. All schools, all CTE programs, and a number of higher learning institutions?

Response: The website should support all adult learners across the state upon launch with a plan to support expansion to all students.

121. Section 3.5, is there a legislative mandate or other reason for the published schedule? Would THECB be willing to consider an alternate schedule of deliverables to achieve a formal launch prior to the end of the fiscal year based on a project start date of January 24, 2022?

Response: Please see the response to question number 52.