

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 #3

December 3, 2021

122. Clause 2 (sub-clause 2.1)
Minimum of five years’ experience providing services like those described in the Scope of Work

We understand that expertise in web-portal & CMS of any category/ verticals will be considered. Please clarify?

Response: Yes, please provide any expertise in web-portal and CMS design and build. Please also provide any experience on projects in the nonprofit and education space.

123. Clause 2 (sub-clause 3.2), Point no. 9
Integrate a career exploration/pathway tool, currently in discovery

It is mentioned as under discovery, please define the role of Respondent in this pathway tool?

Response: The selected vendor would be expected to complete the integration component as we are currently exploring other partnerships for the development of the tool.

124. Clause 2 (sub-clause 3.3), Point no. 5
Develop capability to import and export data from and to Azure data pipeline by calling API (Application Programming Interface) services. (Custom Software Development)

As there is two way inflow & outflow of data from portal to Azure, then there need to be development of API in consultation with Azure for access/update. Please clarify? And coordination with Azure will be taken up by THECB.

Response: THECB Azure environment already exists and is maintained by THECB ISS Vendor role is developing the mechanism to import and

export data relevant to My Texas Future from existing Azure environment. THECB ISS will partner in providing specifics.

125. Clause 2 (sub-clause 3.3), Point no. 12
Account for application integrations, including but not limited to, single sign on (SSO), ApplyTexas, WorkinTexas, financial aid resources, ADVi chat bot, a customer relationship management software, career exploration/pathways tool and databases. (Technology/Content Integration)

We understand, these are the existing applications that are in operation and the Respondent only need to take care-of integrations. Your clarification please?

Response: Yes, the selected vendor is only expected to integrate these tools.

126. Clause 2 (sub-clause 3.3), Point no. 15
Microsoft Azure cloud, using cloud-native architecture and processing tools

Please clarify, that our developers need to develop in the live mode inside the Azure cloud?

Response: Development will happen in Azure cloud. Development, QA, and Production environments are available.

127. Clause 5 (sub-clause 5.2) Payment Terms and Award Summary

Please clarify on the payment milestones and what percentage (%) will be invoiced by the time.

Response: See sections 5.1 and 5.2 of the RFO, which outline the process for defining deliverables and payment for completed deliverables.

128. Is THECB firmly committed to a milestone-based payment approach, or are you open to negotiating alternatives (e.g. a Time & Materials approach to payment/billing)?

Response: THECB is committed to a milestone-based payment approach.

129. Is there an expectation that suppliers have experience in the US/Texas, or would you be open to receiving responses from suppliers with experience in the UK public sector?

Response: We are open to vendors regardless of their experience location.

130. RFO/Document Location/Cell Reference 3.1

Is there an existing tool/portal that captures some of the objectives that My Texas Portal is set out to achieve?

Response: A prototype has been developed which will be shared with the selected vendor; however, we expect a completely new website to be designed and built.

131. RFO/Document Location/Cell Reference 1. Introduction

60x30TX plan: has it already been refreshed? Is the expectation that the vendor will develop the refreshed plan, or just use it as an input into portal design/strategy?

Response: The refreshed 60x30TX plan is in process and will be an input into portal design/strategy.

132. RFO/Document Location/Cell Reference 1. Introduction

Has THECB identified an existing portal (from another State, org, etc.) that inspired this request?

Response: We have not found a portal that accomplishes the same goals, but have been impressed by Tennessee Reconnect and CompeteLA for how they engage human advisors, BigFuture for their reach, and Roadtrip Nation for their user-focused engagement.

133. RFO/Document Location/Cell Reference 3.1

Specifically, what ethnographic and DEI (Diversity, Equity, Inclusion) experts does THECB have access to? Is there an expectation that the selected vendor should provide these experts?

Response: We expect the selected vendor to leverage their own experts related to DEI.

134. RFO/Document Location/Cell Reference 3.1

What are the roles on the THECB side whom will be primarily engaged with the project?

Response: Product Manager/Owner, Partnership management, technical contact within THECB ISS and executive sponsor.

135. RFO/Document Location/Cell Reference 3.1

What is the number of stakeholders and SMEs associated with the project that would be beneficial to interview and discuss project requirements? What will their availability be during the project timeline?

Response: Likely ten (10) to twenty (20), but with a low degree of confidence. If the answer affects vendor pricing, please include ranges in your proposal. Availability cannot be guaranteed, but this project is of high priority to THECB, and all efforts will be made to ensure availability.

136. RFO/Document Location/Cell Reference 3.1

What resources are available in terms of recruiting/finding target audiences?

Response: THECB has conducted polling and interviews with the intended audience and user research related to the prototype which we will share with the selected vendor. Any additional research will be led and conducted by the selected vendor. Selected vendor will be able to leverage THECB's contact database to recruit users for research.

137. RFO/Document Location/Cell Reference 3.1

What strategies have been used in the past to gather this kind of information? What was the success of those efforts?

Response: See the response to question number 136.

138. RFO/Document Location/Cell Reference 3.1

Have "internal and external" stakeholders (higher ed institutions, etc.) already been identified?

Response: No.

139. RFO/Document Location/Cell Reference General

How many other parallel projects are in flight with THECB? Which, if any, are most related to this effort? Are any of them building out a design or component system?

Response: See the responses to question numbers 23 and 59.

140. RFO/Document Location/Cell Reference General

Is there a required design toolset that THECB uses for their projects?

Response: THECB will share its branding guidelines, but we anticipate that the selected vendor will provide recommendations on the portal design.

141. RFO/Document Location/Cell Reference General

What are the current brand standards for THECB, where can they be found?

Response: See the response to question number 50.

142. RFO/Document Location/Cell Reference General

Has the THECB team identified other examples of sites/experiences that are relevant to their future vision and/or similar in nature?

Response: See the response to question number 30.

143. RFO/Document Location/Cell Reference General

Are there any design resources on the THECB side that will need to be considered for involvement when thinking about our project plan?

Response: We will share all previously performed non-confidential research and resources with the selected vendor for consideration, but we expect the selected vendor to design the student portal as part of this RFO.

144. RFO/Document Location/Cell Reference General

Is there currently an owned User feedback tool like Usertesting.com that THECB leverages? Would using one be an option?

Response: No, there is not an owned resource, but we are open to recommendations from vendors. Previous THECB projects have used various options.

145. RFO/Document Location/Cell Reference General

Is there an existing framework in place for prioritizing user feedback into an existing workstream?

Response: We expect the selected vendor to determine this framework, while accounting for the personas and feedback that THECB has gathered from previous research (which will be provided).

146. RFO/Document Location/Cell Reference Section 3.3

Can the portal be released in a phased approach (Minimum Viable Product "MVP," Phase 1, 2, 3 etc.)?

Response: We are open to recommendations from vendors on phasing, provided the identified delivery date (August 2022) includes the features listed in the RFO.

147. RFO/Document Location/Cell Reference Section 3.5

Is the formal launch intended to be an MVP release?

Response: The formal launch date must include the items identified in the RFO. Our goal is to iterate and build beyond this feature set, to include additional features for this audience and additional audiences.

148. RFO/Document Location/Cell Reference General

Can this project be worked in an agile framework? What is the preferred Software/solution delivery lifecycle?

Response: We intend for this project to be developed using an Agile framework. THECB is agnostic on Kanban, Scrum, or other methods of development, as long as the work includes iterative development and the ability for the rapid gathering and incorporation of user feedback.

149. RFO/Document Location/Cell Reference General

Are API contracts already in place with the systems that will need to integrate with THECB systems?

Response: Yes.

150. RFO/Document Location/Cell Reference 11. Proposal Evaluation Criteria

The evaluation criteria call out both the "Project Work Plan" and "Timeline" however these items are not identified as part of either PDF to be submitted. We believe that the "Plan" is our approach and timeline, but the actual project plan is a milestone after project is started. Please advise how/where these should be shared with THECB. Please clarify if you are expecting vendors to provide a draft project plan as part of our proposal?

Response: We anticipate that in the response to the Scope of Work, required under Section 10.2 of the RFO, proposals will include a draft project plan addressing their approach to the project and estimated timeline.

151. RFO/Document Location/Cell Reference Section 3.3, For Technology & Engineering #5

Does the agency expect the vendor to build the data pipeline(s) for aggregating data from the data sources to support data needs of this portal? If yes, how many data sources are expected to be integrated to meet the needs? How often the data should be refreshed? Does the agency need to review the data before the data is published to the website?

Response: This varies by data source and use. Some data already exists within THECB, and necessary APIs exist for access. Other data sources could be of value (for instance, labor market analytics) and would need to be sourced and accessed from other parties. Selected vendor and THECB will collaboratively agree on what data to use and the appropriate access mechanism and refresh time.

152. Can you please share an anticipated budget range for this work so that we can ensure we are proposing the appropriate scale of engagement?

Response: This is a competitive solicitation, and we are unable to provide budget information.

153. Can you share any information about the product owner and decision making team we'll be working with?

Response: The Product Management team is drawn heavily from the group that built Texas OnCourse (primarily in-house). Decision-making will be focused on one key executive, empowered through a governance structure that we are finalizing now with a singular vision and quarterly objectives and key results.

154. Internet Explorer is included in the list of supported browsers in 3.3, *Technology & Engineering*. Would THECB be open to removing this from supported browser requirements? Microsoft is largely removing support of it by June of 2022 and supporting it may restrict the ability for your new site to leverage more recent web technologies.

Response: Agreed.

155. Are we correct in understanding that you expect the new site to be built on the WordPress CMS?

Response: Yes.

156. Can you provide more detail on the data services center the site will need to be built in? This will help us understand how much variance from our standard tooling we'll need to accommodate?

Response: THECB runs primarily in an Azure cloud and uses cloud-native tools to store data and serve it to validated clients.

157. Will THECB provide development and staging environments as well as production? If not, will they have technical staff to assist with integration from our development environments into the Data Services Center hosted site?

Response: The selected vendor will need to create any development and staging environments for the portal itself. THECB will provide technical staff to support connections into parallel environments for data access.

158. Can you provide any additional information about how you anticipate the ADVi chatbot to be integrated with the site? Is it an embeddable feature, or will it need to be added to the site code?

Response: We are interested in proposals and conversations with vendors to determine the right answer here, which will certainly require additional user research and iterations.

159. Is the expectation that audiences will be able to connect with human advisors through the portal? What is the size/capacity of that human advisor team?

Response: That is the expectation. Size/capacity will need to be determined. The selected vendor is not responsible for recruiting/staffing the human advisors, but THECB and the selected vendor will need to align on the product experience that will inform how THECB funds and implements advisors.

160. Can you provide a rough number of other design experts contracted on parallel projects? This is helpful from a budgeting perspective to ensure adequate collaboration time.

Response: We are concluding an engagement with a user research design firm at roughly the same time as this contract will commence, with the goal of their research being valuable to the selected vendor. The conclusion of their engagement includes a deliverable for handing off to selected vendor, and they have expressed willingness to meet with the selected vendor for a warmer handoff.

161. How much, if any, video production or content writing by the vendor is anticipated as part of this project?

Response: Video production is not a requirement of the RFO, but vendors are welcome to propose video as part of their submission. Vendors are responsible for the creation of content, including any new writing as necessary.

162. Is any content migration or loading from the vendor team in scope for this project?

Response: There is little to no required content migration. Content can of course be leveraged from other THECB assets if helpful.

163. What CRM do you currently use?

Response: Please see the response to question number 16.

164. Will the in-development brand standards be complete before the start of the project? Or at least before the second portal design phase?

Response: Yes.

165. Can you share more details on the SSO integration. What is the protocol used? Does it use Azure AD or another off-the-shelf platform, or is it custom?

Response: THECB uses Azure AD B2C for SSO.

166. Are we correct in understanding that the selected vendor will be responsible for building the career exploration/pathways tool?

Response: Please see the response to question number 29.

167. Do you have expectations on the size of the user testing panel?

Response: No hard expectations. We expect to align on a set of personas and ensure that those personas are properly represented in testing.

168. Can we assume that THECB will assist in recruiting user testing panel members?

Response: THECB will assist by providing access to contact lists and use of brand (as helpful), with the expectation that the selected vendor will do the active recruiting.

169. What is driving the requested project launch by August 2022? Depending on how much research needs to be conducted and decision making processes at THECB, 6-7 months for a project of this scale can negatively impact the quality of the final product.

Response: Please see the response to question number 52.

170. Is it expected that the awarded vendor will be contracted for support/enhancements after the conclusion of the build?

Response: The contract period will be as outlined in the RFO. Any additional contracts will be considered separately.

171. Is a time and materials contract type acceptable?

Response: THECB is committed to a milestone-based payment approach. We expect a fixed price contract with all costs considered in the budget proposal.

172. 2.2.1 Company Profile requests management team resumes. Does this reference company management or the team that is responsible for managing the project?

Response: This references the team managing the project specifically, along with any members of management accountable for project delivery and schedule.

173. 2.2.2 Key Staff and Qualifications of Key Staff states “Evidence of qualifications must be included in the Company Profile.” Is it sufficient to just provide these staff qualifications in the Key Staff and Qualifications section, and not duplicate it in the company profile?

Response: Yes.

174. The Proposal Evaluation Criteria references a Project Work Plan. Section 10.2 states that the first PDF should include “2. Scope of Work”. Is the response to the Scope of Work section equivalent to the evaluation criteria for the Project Work Plan?

Response: Yes.

175. The Proposal Evaluation Criteria references Experience and Qualifications. Can you confirm that this aligns with the Minimum Eligibility Requirements that we need to respond to in the first PDF?

Response: Yes, this is correct.