

# 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 #4

December 3, 2021

176. *Project Specific Questions*

Section 3.1. How much time and consultation do you expect to need from Respondent as THECB develops the career exploration/pathway tool, so this tool can be integrated into the My Texas Future portal?

**Response: We anticipate consultation with the selected vendor to focus on the integration timeline and strategy of the tool into My Texas Future, based on factors such as meeting user needs and speed to launch.**

177. *Project Specific Questions*

Section 3.1. In addition to ADVi, what other THECB-curated college and career advising resources are required for integration into the My Texas Future portal? How deep of an integration does each one need?

**Response: Our goal is to create a singular experience for users. Our requirement is to have My Texas Future launched by August 2022. We will work together to determine what additional resources best balance those pushes, noting that the launch date cannot be shifted.**

178. *Project Specific Questions*

What other parallel projects is THECB working on or hiring out to another vendor that will influence or be inputs to this project? What dependencies will the Respondent need to be aware of and worth within?

**Response: Please see the response to question number 160.**

179. *Project Specific Questions*

Section 3.2 states “THECB has conducted extensive research on the intended users, tools needed for them to succeed, and their preferred experience.” Can you provide us with this research so that we can use it to craft our proposal?

**Response: We will provide the selected vendor with all non-confidential research after contract execution.**

180. *Project Specific Questions*

Section 3.3 states “Respondent will utilize and/or align with THECB’s project management practices and templates, including project planning and tracking. The final practices will be agreed upon by the Project Team.” - Do you have examples of the templates, planning, tracking requirements? Can you provide more details about your expectations here?

**Response: THECB uses industry standard software and processes and is happy to consider vendor suggestions for ways to operate.**

181. *Project Specific Questions*

Section 3.3 Technology & Engineering. There are several integrations listed, along with language indicating that additional integrations will need to be accounted for in the response. Please provide a list of the expected third-party or legacy applications the new system will need to interface with. How deep of an integration does each one need? As much detail as possible about the method of each integration will help greatly with our response.

**Response: Data and SSO integration with THECB’s Azure environment will be required for basic portal functions. Additional third-party data integrations will be included as project timelines and priorities allow, in collaboration between THECB and selected vendor.**

182. *Project Specific Questions*

Section 3.3 Technology & Engineering. Could you provide more information about the Azure data pipeline and the type of information that will need to be imported and exported?

**Response: Full technical specifications will be provided to the selected vendor, along with personnel partnership from THECB ISS staff. Data includes information on institutions and users.**

183. *Project Specific Questions*

Section 3.3 Technology & Engineering. Internet Explorer is listed under the browser compatibility section. Since Internet Explorer will no longer be supported by Microsoft, could you confirm that you want the portal to be compatible with Internet Explorer 11 as well as the Microsoft Edge browser? Addition of full Internet Explorer compatibility will increase the project scope.

**Response: We do not need to support Internet Explorer.**

184. *Project Specific Questions*  
Section 3.3 Technology & Engineering mentions WordPress as THECB's CMS. Is the utilization of WordPress required for this project?

**Response: Yes.**

185. *Project Specific Questions*  
Section 3.5 Timeline. Is August 5, 2022 a critical due date? What event is driving the due date?

**Response: Yes. Agency prioritization, funding availability, and parallel projects are the driving factors.**

186. *Project Specific Questions*  
Who will be responsible for the system administration, server configuration, and network configuration duties within the THECB DCS environment since the new portal will need to run in that environment?

**Response: THECB.**

187. *General Questions*  
On many projects we recommend a Research and Discovery phase in order to properly scope a Website Implementation. This is a paid engagement, but generally ends up uncovering valuable information, as well as saving time and money in the long run. It includes deliverables like stakeholder interviews, an audience survey, a content audit, and a technology review, among other items. How would your organization react to us proposing a paid Research and Discovery phase before committing to any kind of implementation?

**Response: This is our only RFO for this project. We are certainly supportive of research and discovery to inform the work and would welcome a comprehensive proposal that includes it as a first phase followed by design and delivery with launch on the timelines included in the RFO.**

188. *General Questions*  
Will the system store any personally identifiable information? If so, will this data be stored locally or with another provider?

**Response: All PII will be stored by THECB in accordance with THECB policies.**

189. *General Questions*

Will new content need to be written for the new site? If so, how much help are you expecting from your chosen partner? Do you need content strategy, copywriting, or copy editing services?

**Response: New content will be needed. The selected vendor will be required to provide a content strategy and execution, as outlined in the RFO.**

190. *General Questions*

If content will be provided by your chosen partner, please give an estimate for how many pages of content will need to be written or edited.

**Response: This will be determined by the selected vendor and THECB as part of the design and delivery.**

191. *General Questions*

How many unique content types or page layouts should be included in the scope? If you don't know for sure, even a ballpark guess would be helpful. A simple site will consist of 4-6 unique page layouts, a site of medium complexity will consist of 6-12 unique page layouts, a complex site will consist of 12-20+ unique page layouts.

**Response: This will be determined by the selected vendor and THECB as part of the design and delivery. We are open to alternate options as part of your proposal.**

192. *General Questions*

Will content need to be presented in languages other than English? If so, which ones?

**Response: Targeting a diverse range of users is crucial for this project. We therefore anticipate some Spanish will be required, but a full Spanish version of the site is not a requirement.**

193. *General Questions*

If multiple languages are needed, who will provide the translated content and should the translated content be human-translated or will a machine translation (such as Google Translate) suffice?

**Response: The site architecture should be built with translation capabilities.**

194. *General Questions*

Related to accessibility, is general adherence to WCAG and Section 508 guidelines acceptable, or do you need formal accessibility testing and/or a WCAG conformance certification (for example, WCAG 2.1 AA certification)?

**Response: Certification of accessibility is required, as outlined in sections 3.3 and 3.4 of the RFO.**

195. *General Questions*

What other functionality will the new site need to include? Besides those described in the RFP, are there any features or functions on the current site that need to be available on the new site?

**Response: The RFO, plus addendums, and this Q&A, are comprehensive.**

196. *General Questions*

Once the project has started, what will the makeup of the decision-making committee be like? Will decisions be made by a large group, a small committee, or a single person?

**Response: We are working to empower a single executive sponsor to support key decisions but know that there is only so much streamlining that can happen.**

197. *General Questions*

What level of training will you require after the website project is complete? Will you just need content contributor training on the CMS or will you need a deeper, more technical developer training?

**Response: We require technical training, as outlined in section 3.4 of the RFO. The exact scope of this can be determined in collaboration once vendor is selected.**

198. *General Questions*

Is there anything about your organization that might make this project difficult?

**Response: We are a state government body tasked with spending taxpayer money in a prudent way.**

199. *General Questions*

Please provide general budget guidelines. Even a rough ballpark estimate or range would be very helpful. Do you imagine this project to be \$100k, \$500k, or \$1M+?

**Response: Please see the response to question number 5.**

200. *General Questions*

Please confirm the due date, time, and preferred submission method of the proposal.

**Response: Please see sections 9 and 10 of the RFO.**

201. *General Questions*

Will proposals be evaluated digitally, or will they be printed for evaluation?

**Response: Some evaluators may choose to print responses while others may prefer digital review.**

202. *General Questions*

Is it acceptable to share documents and attachments using Google?

**Response: No, please see section 10 of the RFO**

203. *General Questions*

How many vendors have submitted questions in response to this RFP?

**Response: We are not able to disclose this information, but we will share all responses to questions received.**

204. Is there a target budget for this project? If so, what is the budget?

**Response: Please see the response to question number 5.**

205. Does THECB prefer (a) off-the-shelf platform with configurability or (b) a custom-programmed solution with unique features?

**Response: We are open to proposals that meet the RFO requirements, though given our existing scan of the marketplace, we are doubtful that an off-the-shelf platform will do so.**

206. Does THECB have a list of requirements or use cases for the *My Texas Future* portal? Is there an existing data flow diagram and can it be shared?

**Response: See the RFO document for requirements. An exact technical diagram for integrating with THECB systems will be provided upon contract execution.**

207. To what extent does THECB anticipate implementing these potential components of the learner lifecycle:
- a. Model career plans that learners can track, change and compare
  - b. Learning goals with ordered, prerequisite and required/optional components
  - c. Learners mapping custom pathways
  - d. Micro-credentialing, with micro-credentials building to larger learning goals
  - e. Access to institution certificate/degree programs and course catalogs within the portal
  - f. Applying to and enrolling in specific course or training programs with institutions
  - g. Links to job boards
  - h. Employer content that learners/job seekers can incorporate into their plans
  - i. THECB administration dashboards, reports and tools to monitor the portal utilization and interpret its effectiveness

**Response: We are excited about all of those components. Given the tight timeline that this project must be delivered on, we are most interested in prioritizing those components that add direct value to end users and least excited about those components that are administrative, or which are not validated as adding value to users via testing and research. Deciding that hierarchy will be a collaborative exercise between THECB and selected vendor.**

208. How are advisers assigned to learners?

**Response: Undetermined at this time. Please see the response to question number 159.**

209. The RFO states that Phase 3 (Development & Build) will be driven by the preceding phases (Discovery and Design). Given that the design will drive scope and cost, what are THECB's expectations for how to price Phase 3? Would a range be appropriate to reflect the span of implementation possibilities from minimum-viable-product to very feature-rich?

**Response: We are open to proposals that include ranges, but note that given how the state procurement process works we will need to contract for a specific proposal with a specific not to exceed value. We are sympathetic to the point about the difficulty of nailing a build scope given uncertain discovery and design and plan to work collaboratively with selected vendor to jointly prioritize resources and features.**

210. The project schedule includes *Provide Comparison Tool* (5/5/2022). Is this the same item as #6 under For Technology & Engineering? Why is this component called out separately from the rest of the solution?

**Response: Please see the response to question number 99.**

211. Are there any key dates in the organization or other efforts that may impact the *My Texas Future* portal project?

**Response: Almost certainly, but we have done our best to outline what we can in the RFO.**

212. The RFO states “Align with relevant stakeholders and evaluate existing inputs, including but not limited to other ongoing THECB projects”. What other projects are included beyond the “career exploration/pathway tool”?

**Response: Please see the response to question number 177.**

213. Are there any special circumstances or "hot buttons" of which we should be aware?

**Response: Almost certainly, but we have done our best to outline what we can in the RFO.**

214. What THECB resources will be available during the project?

**Response: Please see the response to question number 134.**

215. Has THECB identified a project lead to own, drive, and track the project’s progress while monitoring design choices for feasibility and usefulness to core users? (This is more of a Product Manager role, not necessarily THECB Project Manager.)

**Response: We are currently hiring for this role, with a resource identified if we are not able to onboard someone in time.**



216. We understand that the long-term vision is to serve a diverse audience. What user roles are envisioned for the initial launch beyond adult learners and higher education advisors?

**Response: Those are the roles identified for the initial launch.**

217. How many advising, support, administration and other staff will need to be trained in the new solution?

**Response: We will focus on a train the trainer model, with vendor training key THECB personnel.**

218. How is learner-specific input collected (e.g., prior education, credentials, work experience)? Is the system expected to synchronize with other systems of record?

**Response: My Texas Future will integrate with THECB's SSO and CRM to ensure data synchronization.**

219. Are there any historical data load requirements?

**Response: All requirements are in the RFO.**

220. We understand that the *My Texas Future* portal will launch by August 2022. What are the expectations for future phases of the project to incorporate additional features and enhancements?

**Response: Future phases are not covered in this RFO, though our goal is for this work to be flexible enough to allow for them.**

221. What are the expectations for post-launch support by the Awarded Respondent?

**Response: After handoff, bug fixes, and training as outlined in the RFO, THECB will maintain the site post-launch.**

222. We understand the RFO's preference for Microsoft Azure cloud, using cloud-native architecture and processing tools. Does THECB have flexibility to consider Amazon Web Services as an option?

**Response: No.**

223. In Section 8 of Attachment C - Anticipated Contract (pg. 28), there is a reference to several documents that were not provided on the TxSmartbuy website.

Is it possible for you to provide the referenced attachments for our review during the RFP window?

1. Certification Regarding Disclosure of Lobbying Activities (Attachment A) and Disclosure of Lobbying (Attachment A1);
2. Certification Federal Funding Accountability and Transparency Act (FFATA) (Attachment B); and
3. Certification Regarding Debarment and Suspension (Attachment C).

**Response: Yes, the documents will be posted on THECB’s website and on the Electronic State Business Daily (ESBD) for reference only.**

### **RFP Section / Language**

#### Section 3 Scope of Work

The RFO indicates the Discovery and Strategy phase of the project will need to align with “ongoing THECB projects, relevant ethnographic research, technology analyses, as well as statewide data.

224. Can THECB provide any additional details on the most relevant projects this effort will need to consider?

**Response: Please see the response to question number 160.**

225. In terms of the ethnographic research, in what form does this currently exist? E.g. published research findings, supporting data in a consumable format, user/audience personas or other artifacts?

**Response: Please see the response to question number 160.**

226. In terms of the technology analyses, does this include documentation of necessary system integrations, data flow requirements, and technical environments to inform the discovery and technical architecture design?

**Response: Yes.**

227. What types of state-wide data sets (e.g. enrollment data, secondary/postsecondary institution and student data, Texas economic/workforce data, etc.) and is this already in a consolidated and consumable data format?

**Response: All of those data sets are indeed available and in a consumable format.**

228. In terms of stakeholder alignment, document and data sharing to inform the discovery process, are the relevant stakeholder organizations already engaged in the My Texas Future planning effort? And can it be assumed that these organizations will provide ready access to the information and data upon project start?

**Response: We have already begun a governance process to involve relevant stakeholder organizations. We cannot promise easy compliance with the second question, but will certainly work together on it.**

### **RFP Section / Language**

#### Section 3 Scope of Work

In terms of Portal Design, the RFO mentions “desired outcomes” for users interacting with the My Texas Portal and the embedded career exploration/pathway tool.

229. Besides the overarching objectives of the THECB 60x30TX strategic plan described in the RFO, has THECB identified and defined a more granular set of KPIs that should be considered and “built into the portal design”? If so, can those be provided to inform our approach?

**Response: We are in the process of identifying OKRs and KPIs, which will be discussed with selected vendor upon contract execution.**

### **RFP Section / Language**

#### Section 3 Scope of Work

For the Portal Development & Build, the RFO indicates this will occur within THECBs Data Services Center (DSC) system environment

230. Since this will be built within the THECB DSC environment, should we assume that hosting services and associated costs will be provided by THECB to support the project, and include the following”
- Development, Testing, & Production environments?
  - API Services, and what technology is presently used?
  - MS PowerBI or other analytic tool/licenses to support analytics and reporting?

**Response: Yes, though we expect the selected vendor to calculate those costs as part of the technical architecture.**

231. Does this DSC environment already contain the other systems and associated data identified in the RFO that need to be integrated and supported via an Azure data pipeline?

**Response: Yes, though there are additional third-party data sets that may be valuable and can be collaboratively scoped and prioritized as part of the engagement.**

232. Are there existing data sharing agreements in place to support the data integrations needed to support the My Texas Future portal build, or will that need to be put in place as part of this project?

**Response: Data sharing agreements are in place for core data elements. Please see the response to question number 231.**

### **RFP Section / Language**

Section 3.1 Discovery and Strategy

Engage with THECB Tr-Agency Workforce Initiative partners

233. Is there already an established organizing structure for engaging this group of stakeholders, in particular the involvement of the Tri-Agency partners?

**Response: Yes.**

234. If so, how frequently does this Tri-Agency partner group meet? Are meetings to be virtual due to Covid, or can these interactions be a combination of virtual and face-to-face?

**Response: Governance process is still being discussed. Meetings are currently virtual, but face-to-face is possible, especially for key discussions.**

235. Can we assume that THECB will have assigned project staff to assist in coordinating group and individual meetings?

**Response: Yes.**

### **RFP Section / Language**

Section 3.1 Discovery and Strategy

3.1.4 states “Collaborate with THECB staff on a product strategy for integration of a career exploration/pathway tools, which is currently in the discovery phase

Our initial impression from the RFI was that the My Texas Future Portal design and build would include the career exploration/pathway tools as part of a seamless “total” solution.

236. Is it correct that THECB is planning to procure this separately, and that it is currently in the discovery process of evaluating career exploration/pathway platforms to support this requirement?

**Response: Yes, THECB is currently exploring options that best serve the needs of Texas students. We are working collaboratively with another state agency in an effort to optimize both time and resources.**

237. How far along is THECB in this discovery process, and how might it be possible for our firm to be included in its evaluation of existing career exploration/pathway capabilities, specifically designed to support the target populations of the My Texas Future Portal?

**Response: THECB is currently exploring options that best serve the needs of Texas students. We expect to work closely with the selected vendor as this process advances, particularly as we consider how best to integrate into My Texas Future.**

238. What is the current planned timeline for finishing THECBs discovery process, issuing an RFP, and finalizing evaluating and selection of the career exploration/pathway tool? Is it anticipated that will be done prior to the end of this Phase 1 My Texas Future portal development project?

**Response: Please see the response to question numbers 236 and 237.**

239. When does THECB currently plan to have the career exploration/pathway tool operational for integration within the My Texas Future portal? Prior to the August launch date, or in a future phase?

**Response: Please see the response to question numbers 236 and 237.**

240. Can we provide additional information with our proposal detailing a “total solution” that would result in a more seamless user experience, as well as reduced technical complexity and cost?

**Response: Yes.**

## **RFP Section / Language**

### **Section 3.1 Discovery and Strategy**

3.1.6 involves a plan and process for leveraging the ADVi virtual advising chatbot

241. Our understanding is that this is already operational and would like to know what other THECB sites or systems this integrated with at present?

**Response: ADVi is built and operated by Mainstay, using a knowledge database informed and updated by THECB.**

### **RFP Section / Language**

Section 3.1 Discovery and Strategy

3.1.6 other curated college and career advising resources and human advising supports

242. Besides integration of the ADVi virtual advising chatbot, are there other example forms of virtual advisement capabilities (i.e. virtual advising sessions, community forums, etc.) that have been identified by THECBs strategic advising working group that should be considered to inform our solution approach and design?

**Response: Several states have virtual advising capabilities in place. We recommend review of Tennessee Reconnect and CompeteLA.**

### **RFP Section / Language**

Section 3.1 Discovery and Strategy

3.1.7 asks for “rough proposals for future phases of development for additional audiences”

243. Has THECB already identified an initial set of “future phases” for extending the portal design to additional audiences? If so, what are those and over what general timeframe are they desired to occur?

**Response: We do not have specifics at this time.**

244. Is it currently planned that the resulting contract be leveraged to provide for optional future years contracting for the same vendor to continue this effort?

**Response: Any future solicitation will be separate.**

### **RFP Section / Language**

Section 3.2 Portal Design

The RFO indicates that extensive research on the intended users and preferred experience has already been done, and that the awarded vendor will leverage and expand upon this existing human-centered design research.

245. Was this previous human-centered research supported by an outside vendor, and if so who was that and should they be considered and “incumbent” under this My Texas Future portal effort?

**Response: Yes, the human-centered research was supported by an outside vendor. Please see the response to question number 160. There is no incumbent for this solicitation.**

246. Our assumption is that these existing human-centered design artifacts and research findings will be provided to the My Texas Future Portal vendor in a usable form, and what specific design tools were used to create them?

**Response: Yes, please see the response to question number 160.**

247. Are any of these existing design artifacts presently available for vendors to evaluate to help inform our proposed design approach?

**Response: No.**

### **RFP Section / Language**

#### Section 3.2 Portal Design

3.2.4 states “Complete/acquire necessary visual design elements...”

248. To what extent did the preceding human-centered design efforts address a branding strategy and preliminary visual design for the My Texas Future portal?

**Response: Very lightly, and with very low expectation of fidelity.**

### **RFP Section / Language**

#### Section 3.2 Portal Design

3.2.5 states “Incorporate user identity management that connects to a broader THECB customer relationship management (CRM) tool”

249. What CRM platform is in place at THECB today that the My Texas Future portal will need to connect and integrate with?

**Response: Please see the response to question number 16.**

250. In terms of incorporating user identify management, is it envisioned users of the portal will create accounts and profiles within the portal application, or is it envisioned that user account details and relevant PII will be managed within the CRM or other THECB system?

**Response: Vendor will integrate with THECB SSO and CRM.**

**RFP Section / Language**

Section 3.3 Portal Development and Build

The RFO details an August deadline for launching the My Texas Future Portal

251. Is there something in particular that is driving the current portal launch date? E.g. in-year funding execution, THECB or state legislative drivers, or start of new academic calendar year?

**Response: State funding.**

252. If there are delays in evaluating and awarding the resulting contract, will the project schedule and the August launch date be adjusted?

**Response: Unknown.**

**RFP Section / Language**

Section 3.3 Portal Development and Build

For Project Management

253. Will THCB have a full-time or part-time assigned project manager/product owner dedicated to the My Texas Future phase 1 project effort? If not full-time, what percentage of their time will be allocated to supporting this effort?

**Response: Yes, full-time.**

**RFP Section / Language**

Section 3.3 Portal Development and Build

For Technical Engineering

Item 4 manage and integrate databases with calculated metrics; integrating CRM software and other existing state tools/artifacts

254. What specific calculated metrics are involved with this?

**Response: Specific KPIs to be determined collaboratively.**

255. Our assumption is that this will entail a collaborative effort between the vendor and THECB's CRM system and system owner, and that the vendor's responsibility will be centered around managing databases and metrics pertaining to the My Texas Portal system and their interaction with other THECB systems and data, is that correct?"



**Response: Correct.**

**RFP Section / Language**

Section 3.3 Portal Development and Build

For Technical Engineering

Item 5 / 6 import and export data from and to Azure data pipeline by API

256. What API service(s) does THECB already have in place supporting the Azure data pipeline?

**Response: Data integrations for key components.**

257. Is this Azure data pipeline already in place and supporting the known systems identified within the RFO that will need to be integrated and using shared data?

**Response: Yes, for internal data.**

**RFP Section / Language**

Section 3.3 Portal Development and Build

For Technical Engineering

Item 6 Interactive tool that integrates data provided by THECB

258. For relevant Texas institution and program data, how frequently is this updated and refreshed by THECB?

**Response: Varies by data source/type. Vendor will not need to update or refresh the data.**

259. Is the functionality being described for this capability intended for internal THECB stakeholders or end users of the portal, or both?

**Response: Both, with a primary focus on end users.**

260. If for internal THECB stakeholders/users, will this tool require any form of user access controls?

**Response: Internal users will access via existing SSO.**

**RFP Section / Language**

Section 3.3 Portal Development and Build

For Technical Engineering

Item 8 State accessibility requirements

261. Does the THECB DSC and supporting IT environment / organization have in place testing tools to conduct accessibility and usability, or will the vendor need to provide this?

**Response: THECB ISS has preferred accessibility testing tools.**

**RFP Section / Language**

Section 3.3 Portal Development and Build

For Technical Engineering

Item 14 THECB has identified WordPress as its content management system.

262. The RFO states that WordPress has been identified as its CMS, however, is it possible to propose an alternate “headless CMS” solution that may better support both content management and APIs delivering content?

**Response: WordPress is a requirement.**

**RFP Section / Language**

Section 3.3 Portal Development and Build

For Testing and Quality Assurance

263. Does the THECB DSC environment include any specific automated testing tools that are in place to support testing and quality assurance?

**Response: No, none of our testing is automated. We have WebInspect, which does scans but it is started manually.**

**RFP Section / Language**

Section 5.1 Pricing

Pricing must be all-inclusive, covering all services required to provide all deliverables as described in the RFO, including travel expenses, personnel costs, etc.

264. Should the offerors pricing input for items such as travel, be included within its total bid price, or travel estimates itemized and re-imbursed based separately based upon actual completed travel?

**Response: Yes, we anticipate pricing should consider all costs, inclusive of travel and other expenses.**

265. The present pricing guidance appears to want itemized pricing based upon the deliverables list in Section 3.4, which while associated with the project phases, in

some cases are not readily translated into itemized costs/pricing. Is it possible to provide pricing inputs broken out by Phase, with relevant deliverables associated with each phase and price?

**Response: Yes.**

266. We are assuming THECB desires pricing to be submitted on a firm-fixed-price (FFP) basis, is that correct?

**Response: Yes, this is correct.**