# 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 #5
### December 3, 2021

267. How many fulfillers will be using the system?  A agent/fulfiller is a person working for Texas Higher Ed who would be using the portal and underlying system to support the end users? (Users – students, faculty, advisors, using the portal are free of charge.)

    **Response: Unknown.**

268. How many managers would be using the system in order to run reports and view metrics (read only access)?

    **Response: Unknown.**

269. Will you be publishing an amendment of all of the questions submitted?  If so, will you be distributing them to those asking questions or posting them on a website?

    **Response: We will post all responses to questions on THECB's website and on the Electronic State Business Daily (ESBD).**

270. 1.0 Introduction:  What is the scope of the current audience versus the future defined audience? Besides secondary and post-secondary users, have any other future defined audiences been identified?

    **Response: No other future audiences have currently been defined.**

271. 1.0 Introduction:  What role (if any) would awarded respondent need to play regarding the initial fieldwork and analysis in understanding the challenges of the economically disadvantages students?

**Response: Please see the response to question number 160. The selected vendor will need to consolidate existing research and analysis and conduct any additional research to inform the strategy and design.**

272. 3.0 Scope of Work: We have the framework in place to support the Discovery and Strategy, Portal Design, and Portal Development and Build phases for My TX Future. To meet the extensive integration needs and aggressive formal launch date of August 5, 2022, is THECB open to using our pre-built modular elements to support the build?

    **Response: Yes, please detail in your response.**

273. 3.0 Scope of Work: Please expand upon the career exploration/pathway tool which is currently in the discovery phase.

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

274. 3.1 Discovery and Strategy: Would integration with ApplyTexas satisfy the enrollment/reenrollment functional capacities envisioned for the My TX Future Portal?

    **Response: Our goal is to meet user needs—we would certainly anticipate that easier onboarding/access to ApplyTexas would have a positive impact on users.**

275. 3.1 Discovery and Strategy: What are some examples of the existing advising tools and resources THECB would like to leverage within the portal?

    **Response: ADVi and Texas OnCourse are existing THECB resources. Also, please see the response to question number 242.**

276. 3.1 Discovery and Strategy: Is ADVi (virtual advising chatbot) fully functional, requiring purposeful integration only?

    **Response: Yes.**

277. 3.2 Portal Design: What Customer Relationship Management (CRM) tool is THECB currently using?

    **Response: THECB does not currently leverage a CRM. We are currently exploring options for integration.**

278. 3 Portal Development and Build: Are you open to leveraging our current workflow management tools, which include Microsoft Project and Gantt charts?

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

279. RFO Section Number 3.1, Page 3
Will THECB confirm if there is research data available on the human advisor group and if it can be available for review? Will users from this group be available for user interviews? Roughly how many users of this type are expected?

**Response: Existing human advisors (affiliated with ADVi) will be available for interviews. The current number is low single digits. We have some research on human advising, but there is a significant library of public research that supports the importance of the work.**

280. RFO Section Number 3.2, Page 4
Will THECB confirm the Customer Relationship Management (CRM) tool currently implemented/used at THECB now?

**Response: Please see the response to question number 277.**

281. RFO Section Number 3.2, Page 4
Will THECB provide access to the high-level findings / insights for users preferred experience?

**Response: Yes, we will share all non-confidential research and resources with the selected vendor.**

282. RFO Section Number 3.2, Page 5
Will enrollment take place in the My Texas Future portal, or elsewhere? Further, are any monetary transactions expected to take place in the portal?

**Response: Enrollment will not take place within My Texas Future, nor will any monetary transactions occur.**

283. RFO Section Number 3.3, Page 7
Will THECB share the agency's enterprise architecture design vision mentioned?

**Response: Yes.**

284. Are you able to support us in recruiting qualifying respondents from underrepresented backgrounds?

**Response: Please see the response to question number 136.**

285. What ethnographic research has already been conducted and would be available for us to leverage? When was it conducted? What were its desired learning objectives? What populations were studied?

**Response: See the response to question number 160. We will share all relevant information with the selected vendor.**

286. How are advisors interacting with current or potential students on THECB-owned and operated properties today?

**Response: Advisors currently interact through ADVi for THECB-mediated advising. Schools, workforce boards, and beyond are also leveraged more generally.**

287. Is it possible to begin the strategy and design phase earlier? Even a week or two earlier will make a difference.

**Response: Yes.**

288. Will the portal need to include a Learning Management System? Or is it just a resource to identify education and training options that would take place off the platform?

**Response: The portal does not need to include an LMS. We are open to proposals that do include one.**

289. Is there a version of the "My Texas Future" portal live currently? If so, is this the URL? https://thecb.bowtiebi.com/

**Response: The referenced URL is the prototype website.**

290. Are you expecting respondents to reply to the Project Scope outlined in Section 3 as well as the Project Deliverables outlined in Section 3.4 as part of the proposal response?

**Response: The same responses can be used.**

291. Who is responsible for content creation (specifically written content)? Will we be expected to create or modify existing content?

   **Response: The selected vendor is responsible for sourcing all content, which can include existing content or newly created content.**

292. Can you confirm the budget allocation THECB has set aside for this engagement?

   **Response: Please see the response to question number 152.**

293. What metrics are used to measure higher education attainment progress (e.g., credits, degrees, student loans, etc.)? How is that data collected and broken down? What metrics are most relevant to the success of the My Texas Future portal?

   **Response: The question of how best to measure attainment progress is an excellent one, and there is no clear consensus answer. We are currently focused on students receiving a credential of value in the labor market. THECB is in possession of significant data on institutions and students and can make data dictionaries available to the selected vendor upon contract execution. We are currently going through an Outcome and Key Results (OKR) process with the wider stakeholder group to align on answers to the third question. We are interested in bringing that alignment to an open discussion with the selected vendor where the research and development priorities can be worked through together to align on the right product-specific OKRs and Key Performance Indicators.**

294. How have participants in previous research studies for THECB been incentivized to participate? Are there restrictions legal or institutional for the types of incentives that we can provide to encourage participation in research studies?

   **Response: Previous research participants have been paid for their time. We will work with the selected vendor and THECB's legal team to ensure compliance.**

295. Is there an existing understanding of the student journey within THECB (either for existing or stopped out and re-entering students)?

   **Response: Please see the response to question number 160, which has focused on several personas of the student journey.**

296. You mention that engaging advisors from "within THECB and potential partner capacity and resources" will be critical to the success of a strategy for My Texas future. Who are these potential partners? Can we learn more about who these advisors are and the roles they play within THECB and its partner organizations today?

    **Response: Most crucially it is the other state agencies: The Texas Workforce Commission and the Texas Education Agency. Additional partners include institutions of higher education, employers, and non-profits focused on college success, such as the College Advising Corps.**

297. Can you tell us what Accessible education platforms this is likely to interface with? And which accessible plug-ins you're currently prioritizing?

    **Response: The platform must meet the accessibility standards outlined section 3.3 of the RFO.**

298. What platform is the current experience on and is there a wish to stay on that platform or change?

    **Response: There is not a current platform being adapted.**

299. What is the tech stack you're envisioning for this portal?

    **Response: Vendors will provide a proposal for tech stack, as per section 3.4 of the RFO.**

300. What kind of advisor educating are you planning to do on the platform? Looking to understand if this would likely be a list of inclusion and accessibility best practices or if it's going to be more along the lines of inclusion and accessibility lesson planning.

    **Response: Human advisors will be separately trained and selected for their expertise in the college going process. Any training required by the selected vendor will be platform-specific on navigating the site.**

301. Will this portal need to accommodate for multiple languages? If so, how many? Are you expecting to integrate a translation integration (e.g., Google Translate)?

    **Response: Please see the response to question numbers 192 and 193.**

302. Can a user apply to a program through the portal? Can they apply for a job through the portal?

   **Response: We do not anticipate users applying to programs or jobs through the website.**

303. Can you tell us more about the ADVi (virtual advising chatbot), and any other THECB-curated college and career advising resources that exist today? What is the vision for that capability?

   **Response: My Texas Future should be a single location that users can access what they need, as outlined in the RFO. Additional tools, such as ADVi, Texas OnCourse, and other THECB resources, should support this vision and be incorporated as useful and feasible.**

304. Can you tell us more about the Tri-Agency Workforce Initiative, in which THECB is partnering with the Texas Education Agency and Texas Workforce Commission)? What are the initiative's stated goals? How are responsibilities split between the agencies?

   **Response: See https://triagency.texas.gov/.**

305. How much time is needed by your team to provide feedback on work-in-progress deliverables? How much time is needed to provide approvals?

   **Response: We are currently working to align internal stakeholders so that once the selected vendor has been onboarded, we are positioned to move as quickly as possible on feedback and approvals. We anticipate being able to give feedback on work-in-progress within twenty-four to forty-eight (24-48) hours. Approvals on finalized architecture and design should be given a week.**

306. How many day-to-day stakeholders will be involved?

   **Response: We are working to empower a Product Manager and single executive sponsor to streamline decisions and engagement.**

307. Is there an existing brand system, or one being developed for My Texas Future?

   **Response: Our marketing team will provide branding guidelines to the selected vendor.**

308. Can a user apply for financial aid/scholarships/college/certificate program/job/ through the portal?

**Response: No.**

309. Can you describe a successful partnership from a past project and what aspects made that project a win - in contrast any partnerships that didn't work and why?

**Response: Each project is reviewed independently based on its requirements and criteria. We recommend that each vendor present its strongest proposal addressing each element within the RFO.**

310. Are there any other 3rd party partnerships owned by THECB that [vendor] would be asked to interface with that are not listed in the RFP - example "Texas Education Agency" and "Texas Workforce Commission". We're used to coordinating efforts with multiple vendors while working with a client. Additionally, having visibility into 3rd party initiatives, such as a marketing campaign launches or content strategy improvements related to SEO help direct some of our efforts so we are optimizing all angles of our relationship.

**Response: There are no parallel vendor engagements planned alongside this work. Partnerships with the Texas Education Agency and Texas Workforce Commission will be crucial as they are key stakeholders in this work. THECB will be responsible for a governance structure that includes and engages them.**

311. Are there any existing THECB source codes/apps in existence already?

**Response: Yes, see Texas OnCourse as one example.**

312. Are there any considerations on technology? Any frameworks to avoid or that are definitely preferred?
    ◆ Referring to page 7, #14: *Propose and gain THECB acceptance for the My Texas Future technical stack, including database components and more. THECB currently uses JavaScript on its existing websites and has identified WordPress as its content management system. (Technology).*
        • **Is THECB set on building on Wordpress, or using PHP, or is the CMS tech stack open for recommendation?**

**Response: THECB has selected WordPress as a CMS. Beyond that we are open to vendor proposals for tech stacks and frameworks.**

313. Do you have any HTML/FE coding standards you would like to see adhered to?

   **Response: No.**

314. What is the regular pace of touchpoints with THECB-employees currently? (Is there a high-touchpoint time period we should be aware of? Regular quarterly check-ins? Strategic planning sessions? etc)

   **Response: We are open to proposals on the pace of touchpoints. We are currently working to empower a small group of staff so that touchpoints are streamlined and efficient.**

315. Have you considered a web and app multi-platform approach to My Texas Future, or did the responsive web-only engagement come out of research and testing?

   **Response: Our read of the research suggests that native apps perform poorly at engaging students for transactional tasks.**

316. What kind of access will be available for any student user testing and feedback in the UX Discovery phase? Do you see this being facilitated by [vendor] or in-house?

   **Response: The selected vendor will facilitate user testing and feedback during Discovery and be able to call upon THECB contacts, mailing lists, and brand to support.**

317. Is the MyTexas Future brand / logo a target for a branding concept workshop, or is that brand element locked?

   **Response: It is not locked.**

318. Are there any visual assets available (logo, icons, images, photos of the researchers, videos, graphics)? If not, are you looking for [vendor] to work with you on a full design system for the portal?
   ◆ Is there interest in expanding upon your existing 60x30TX brand?
   ◆ Are there any guidelines around choosing stock photography?
   ◆ Does THECB have any guiding principles in place that drive design?

   **Response: We are finalizing branding guidelines for THECB as a whole, which will be available to the selected vendor by the time of contract execution. We expect the selected vendor to be responsible for a full design system for the portal, subject to the THECB branding guidelines.**

319. We have worked with US ADA Compliance guidelines many times. As your/any products live today, do you have any compliance testing or design standards already in place that you can share with us? Also, is there any government review or approval process that we will participate in in order to ensure specific guidelines are met?

**Response: Please see section 3.3 of the RFO.**

320. What are the key indicators of success for this project (like the 60x30TX goals)? Aside from the deliverables, are there measurable outcomes or KPI's you will be tracking as new versions of the platform(s) and net-new features are introduced. *Examples:*
    ◆ *Increasing usage of of the My Texas Future apps on a weekly or monthly basis by X%*
    ◆ *Onboarding X number of new users to by the end of the 5 year engagement and beyond*

**Response: Please see the response to question number 293.**

321. What platform are you currently pulling data and analytics from?

**Response: Internal tracking and CRM.**

322. What do you have in existence already in terms of data reporting?

**Response: Internal tools.**

323. What kind of live data are we collecting? Are we seeing aggregated data across users / student groups or high level benchmarking?
    ◆ Do you have a Google Analytics account? If so, who currently manages your Google Analytics account, maintenance and setup for any custom funnels or reports that need to be tracked?
    ◆ If recommendations for funnel improvements are made, will we be able to consult with the implementation team before we begin design to assess feasibility and desire to update any changes related to Google Analytics?

**Response: We are open to proposals and discussion of what data to collect and how it can inform a site that better serves students. THECB uses Google Analytics, managed by our Marketing Team, and is open to adaptations for this project.**

324. How will social media accounts (THECB & potential users') need to be integrated, if any?

    **Response: We are open to vendor proposals on this topic.**

325. Is any part of THECB digital landscape capable of multilingual translation at the moment?

    **Response: THECB has assets in Spanish, but nothing that allows for live translation.**

326. Is there a desired advisor recruitment growth number [vendor] will be held against?

    **Response: The selected vendor will not be responsible for advisor recruitment.**

327. Does the Board have a budget or budget range for this project?

    **Response: Please see the response to question number 152.**

328. Is there something specific driving the delivery date for the new portal?

    **Response: State budgeting.**

329. Is the requirement to "Develop the site within the Microsoft Azure cloud, using cloud-native architecture and processing tools" a mandatory requirement?

    **Response: Yes.**

330. Would it be acceptable to build the site on another platform and deliver the code to be pushed to your Azure server?

    **Response: Yes, though note that the selected vendor will be responsible for the transition and ensuring successful deployment.**

331. Are you able to list your current hosting environment's CPU and RAM allocation?

    **Response: N/A, no current site to compare.**

332. What do you estimate your monthly CDN usage to be?

**Response: N/A, no current site to compare.**

333. How much bandwidth does your site typically send each month?

**Response: N/A, no current site to compare.**

334. Total amount of disk storage you will need.

**Response: Unknown.**

335. How many sites will be included?

**Response: Unknown.**

336. Average page views per month the site receives?

**Response: N/A, no current site to compare.**

337. What is the anticipated budget for this project?

**Response: Please see the response to question number 152.**

338. When is the THECB expecting to make an award?

**Response: As soon as possible.**

339. How long does it usually take to negotiate a contract after an award is made?

**Response: Different projects require different amounts of time.**

340. Does THECB currently have a statewide CRM in place? If so, which CRM will need to be integrated with My Texas Future?

**Response: No.**

341. What data needs to be specifically integrated with the CRM?

**Response: Usage data from My Texas Future, for instance search history and careers of interest.**

342. Related to state accessibility requirements, does THECB intend to conduct and pay for accessibility scans and testing? Additionally, will the solution need to be WCAG compliant, or working towards AA compliance?

    **Response: Please see section 3.3 of the RFO.**

343. In regard to providing a plan to engage human advisors, is the expectation to engage with academic advisors on college and university campuses? If not, will THECB be directly employing/contracting advisors?

    **Response: THECB currently identifies, manages, and employs advisors for ADVi, the virtual chatbot. However, we are open to new strategies that leverage other pools of advisors (i.e., from institutions and/or workforce boards) to support a more scalable model.**

344. Will human advisors be mandated to use the My Texas Future portal?

    **Response: No.**

345. The solicitation references integration with a career exploration/pathway tool that is currently in discovery. Has a tool already been identified for career exploration/pathway? Is this one tool, or separate tools for career exploration and career pathways? What is the functionality? Is THECB building an in-house solution for career exploration/pathway?

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

346. What level of engagement will be expected with local employers?

    **Response: Determining the value of this site to employers (and the value of employers to the site) will be an important element of the discovery process.**

347. Are you open to proven solutions that meet the requirements of the RFO, but do not require a new UI/UX design?

    **Response: Yes.**