

Texas Higher Education Coordinating Board

Request for Offer (RFO)

Data Modernization Initiative Public Portal

RFO No. 781-2-25825

Questions and Answers No. 2

January 7, 2022

1. I am interested in submitted a response to RFO #781-2-25825 Data Modernization Initiative Public Portal. In section 2.02.1 Active Department of Information Resources Vendor – it reads that the respondent must be an active DIR vendor. How can we apply to become a DIR vendor?

Response: An Addendum has been posted correcting 2.02.1 Minimum Eligibility Requirements.
2. In regards to Section 2.02.1 it specifically states you must have a current DIR account etc. When researching how to become DIR it is given to the entity by submitting a response to a current RFP, RFO, etc. If we do not have a current DIR and cannot provide the necessary info in 2.02.1 are we not eligible to respond to this since it must already be established.

Response: An Addendum has been posted correcting 2.02.1 Minimum Eligibility Requirements.
3. Whether companies from Outside USA can apply for this? (like, from India or Canada)

Response: Provided the contractors are based in the United States and authorized to do business in Texas, the company may be international.
4. Whether we need to come over there for meetings?

Response: No, you will not need to be in person for meetings. THECB will be able to hold meetings virtually.
5. Can we perform the tasks (related to RFP) outside USA? (like, from India or Canada)

Response: The contractors will need to be based in the United States, all work will need to be performed in the United States, and all data associated with the project, including back-ups, must be maintained in the United States.
6. Can we submit the proposals via email?

Response: Yes, please see section 9.02 of the RFO, pg. 17.

7. Can you please indicate the estimated budget for this project so that we can best scale a solution that meets THECB's expectations?
Response: The THECB cannot provide budget information for this procurement.
8. Given the holiday, will THECB please consider extending the proposal deadline by seven working days?
Response:
New proposal due date: January 19, 2022, 11:30 p.m.
Please see revised timeline on Addendum No. 2.
9. Is there protected data or PII on the portal?
Response: Protected data or PII (personally identifiable information) data will not be provided through this portal.
10. What level of expected technical involvement for the selected vendor in making data improvements for the interim strategy of displaying data on current sites?
Response: The selected vendor is expected to meet the deliverables set forth in Section 3.04 of the RFA regarding displaying the data on the current THECB sites until such sites are retired.
11. Is it expected that the selected vendor will be involved in maintenance and updates of the new portal post-release? Or will THECB staff take over technical maintenance and updates? If so, what technical skills does THECB have available?
Response: THECB staff will take over technical maintenance and updates for the portal post-release. The selected vendor is responsible for providing technical documentation and training as specified in Section 3.05.
12. Can you please indicate the state of data on the external sites? How much data cleanup is anticipated?
Response: Minimal data cleanup is anticipated as the data marts used for public portal reporting are in place and undergoing quality assurance testing at this time.
13. 3.01.08. Can you provide additional information on expected vendor tasks or the goal here? Are all dashboards required by state statute? Are there potentially required dashboards that don't exist?
Response: Please refer to the RFO for specifics on vendor tasks, deliverables, and purposes to be met through this work.
14. 3.02.04. Based on our experience with Wordpress, we wouldn't recommend it as a platform for managing complex data visualizations. It would be an excellent platform for managing associated content, but does not provide good support for complex visualizations. Are you open to a two part application with Wordpress for the CMS and data dashboards built in a separate application?
Response: Proposals may provide for alternative approaches and all proposals will be evaluated in accordance with criteria set forth in section 10 of the RFO.
15. Are data dashboards going to be built in PowerBI? How much vendor involvement in creation of actual dashboards do you expect?

Response: PowerBI is the selected tool for data dashboards as set forth in the RFO.

16. What do you currently use for analytics?

Response: THECB currently uses SiteImprove and intends to deploy both SiteImprove and Google Analytics moving forward.

17. Do you expect site search to return details from within dashboards?

Response: The site search should use report metadata to return results at the report level as set forth in section 3.03.02.

18. The provided list of WP plugins suggests that the current site is built using “site-builder” plugins and functionality. For scalability, accessibility and design customization reasons, we recommend building the site layout using a custom theme and Gutenberg blocks. Is THECB open to this approach?

Proposals may provide for alternative approaches and all proposals will be evaluated in accordance with criteria set forth in section 10 of the RFO.

19. Can you provide THECB’s web traffic expectations?

Response: By optimizing the user experience and increasing the accessibility of our data and data visualizations, we hope to greatly increase web traffic.

20. 3.03.10.3 Given the upcoming phase out of Internet Explorer, would THECB be amenable to removing it from the list of supported browsers? Also, given the current lack of a Windows mobile device, is it acceptable to remove that from the list of supported devices?

Response: THECB will continue to support Internet Explorer so the site will need to support that browser as set forth in section 3.03.10.3 of the RFO.

21. 3.03.17 Will the vendor be responsible for any compensation or recruitment costs associated with user testing?

Response: Any compensation or recruitment costs for user testing will be the responsibility of the vendor.

22. Can you share the number and URLs of the current data websites?

Response: THECB data websites are listed at <https://www.highered.texas.gov/data-reports/>.

23. Can you provide technical details of how and where the data that will be incorporated into dashboards and visualizations is stored? And the format?

Response: The data source will be stored in Azure. Power BI is our selected reporting tool and is connected to the data sources in Azure to display reports and build dashboards.

24. Can you provide the THECB’s existing brand guidelines?

Response: THECB recently underwent a rebranding and is finalizing its brand standards, which will be provided to the vendor at the commencement of the work.

25. Can you share the type of data you anticipate being visualized?

Response: See <http://www.txhigheredaccountability.org/acctpublic/> for a general idea of data of the type of data the agency handles. See the answer to Question 22 for the list of existing websites.

26. How often do you expect the data to be synchronized? (i.e., daily, weekly, live?)

Response: Most data will be synchronized in real time.

27. Page 3. Users who access.... Who are the users? Can you provide a list of the existing websites and web applications?

Response: The users accessing this site include students and families, policy makers, researchers, higher education leaders, general public, and others. See the answer to Question 22 for the list of existing websites.

28. Page 5. 3.01.04 Can the priority user personas be defined in the format of Agile User Stories? i.e. As a <role>, I want <goal>, so that <benefit>

Response: Yes, priority user personas can be defined in the Agile format.

29. Page 6. 3.02.04 Will THECB fund any costs associated with the WordPress CMS hosting, tools, and associated plug ins?

Response: THECB will fund costs associated with WordPress CMS hosting, etc.

30. Page 6 3.02.14 Is there a preferred software for the prototypes?

Response: THECB does not have a preferred software for prototyping and expects the vendor to be responsible for this. THECB is not responsible for procuring any additional software to assist the vendor to complete prototyping work.

31. Page 7. 3.03.02 Does THECB has existing data dictionaries of THECB's websites and applications data sets/data elements including Business Definitions?

Response: No formal data dictionary exists.

32. Page 8. 3.03.05 Does THECB expects the contractor to pay for any services associated with the THECB's Microsoft Azure Subscription or will THECB directly pay Microsoft for any monthly Azure Services?

Response: THECB will pay for services associated with THECB's Microsoft Azure subscription.

33. Page 8. 3.03.08 Are the dynamic data tables expected to be AA compliant?

Response: Yes. AA compliance is required as set forth in section 3.03.08.

34. What is THECB's philosophy on the following?

a. AI, Data Science?

b. Data governance on visualizations?

c. Provisioning?

Response: THECB seeks to provide useful insight and data to key stakeholders to inform decisions and improve outcomes for students, within appropriate governance and in accordance with privacy, confidentiality, and security laws and best practices. A formal project is underway to create a formal data architecture model and establish a formal enterprise-wide data governance program.

- 35.** What are the expectations about secure (non-THECB data). TWC, TEA, IPEDS, Clearinghouse?
Response: Use of additional data sources is governed by data sharing agreements with the agencies providing data. Expectations for the use of this data will be developed with the selected vendor and in accordance with existing agreements.
- 36.** Does THECB have an established platform for conducting market, user, and organizational research as described in 3.01.03? If so, what is the platform? If not, what are THECB's preferences for conducting the research?
Response: THECB does not have an established platform for market, user, or organizational research and is open to vendor recommendations.
- 37.** How many reports have been identified as priority data reports in 3.01.06?
Response: The estimated number of reports is 30-40.
- 38.** How many internal and external data dashboards will be part of 3.02.14?
Response: The number of dashboards is unknown at this time.
- 39.** There do not appear to be any requirements on the data used for the reports. What are THECB's data preparation needs for these data dashboards? Will the data already be properly structured for reporting purposes? Does the data require any cleansing or transformations? Are the desired metrics available and integrated within the source data?
Response: Several data marts are being created to support data dashboards. Metrics such as those currently provided at <http://www.txhigheredaccountability.org/acctpublic/> are in the process of being automated and will be made available.
- 40.** Would THECB please consider extending the deadline for the response submission by two weeks? Proposed deadline January 21, 2022.
Response: The new proposal due date: January 19, 2022, 11:30 p.m. Please see revised timeline on Addendum No. 2.
- 41.** How does the THECB consider software/strategies outside of the RFO but consistent with software currently in place at the THECB?
Response: Proposals may provide for alternative approaches and all proposals will be evaluated in accordance with criteria set forth in section 10 of the RFO.
- 42.** In item 3.03.04 on page 7, reference is made to a short list of web applications. Are respondents limited to using only that list, or may it be supplemented with other cloud-native tools?
Response: Proposals may provide for alternative approaches and all proposals will be evaluated in accordance with criteria set forth in section 10 of the RFO.
- 43.** Can you disclose a budget range or budget cap for this project?
Response: See answer to Question 7.
- 44.** Is there an incumbent on this project? If so, will they be bidding on this project and how long have they had the contract?

Response: There is no incumbent on this project. This is new work for THECB.

- 45.** What was the investment in the previous website since it was launched? How many iterations of changes have already been done and to what extent, kindly share more information?

Response: THECB is looking to more strategically invest in its digital product offerings to better meet the needs of its users. Our current digital landscape reflects a complex web of digital spaces that hasn't been updated in many years.

- 46.** What subsystems currently exist/ what types of systems are currently integrated which are in scope for us (i.e., Reporting, payment, CRM etc.)?

a. Kindly share their URLs if available public?

b. What use cases are supported by each integration?

Response: See answer to Question 22.

- 47.** Considering the current pandemic situation, as most out our staffs are working from remote locations, may we request you to consider providing and extension of 2 weeks from the date of its current submission.

Response: Timelines may be negotiated with the potential vendor during contract negotiations.

- 48.** What is the duration for which the Maintenance & support phase is required after development?

Response: The maintenance and support phase should not extend past Sept. 30, 2022.

- 49.** What is the estimated Team size & details during the maintenance & support phase?

Response: The scope, expected activities, and the deliverables are listed on page 10 under 3.05.

- 50.** What is the SLA for the Maintenance & support phase for unified experience site?

Response: As stated under 3.05 on page 10: "Awarded Respondent will establish and document processes for content updates and modifications at an agreed upon date during the project."

- 51.** It is mentioned at Page – 3, last paragraph, that there are multiple sources across the various online access and submission points having multiple reports in various formats. We would like to know about the multiple data sources and technology stack/tools being used by these websites.

Response: THECB's existing application portfolio is made up of ColdFusion and .Net C# applications. Backend database: SQL and MySQL. Content management systems: Mura, FarCry, and WordPress.

- 52.** Please provide the Web Site details & URL to be considered for revamp for Unified experience ?

Response: See answer to Question 22.

- 53.** How Many Pages/Reports (Simple , Medium & Complex) for each Site/Application are to be developed & Revamped and as part of the Unified Experience of the new Portal ?
Response: This will be based on the vendor's discovery and recommended strategy as provided in section 3 of the RFO.
- 54.** The following is Out of Scope . Please confirm
a) To change any Data Model for the existing sites/Web Portal.
Response: The vendor team will follow the THECB data model and architecture design principles.
b) Availability in languages other than English.
Response: THECB is open to providing a Spanish version of the site if that can be accomplished within the project timeline.
- 55.** Please confirm if the following assumption is True or not
THECB assumes question No. 55 is tied to questions Nos. 56 and 57. If assumption is correct, please find answer under No. 56 and No. 57.
- 56.** Data Cleansing & Data Migration shall be out of scope and THEECB shall provide us the Data to be consumed in required format for Unified User Experience.
Response: This is correct, data cleansing and migration are out of scope.
- 57.** For Unified experience , there is no need to provide any API as part of the Vendor scope for retrieving the data from multiple websites/Web Portal
Response: the vendor should be able to leverage existing API's provided by the agency IT team to retrieve data from multiple sources.
- 58.** Are there defined user-profiles (personas) for the Web App? Please elaborate on the typical app user and their needs.
Response: See the answer to Question 27 for a list of user groups. User personas do not exist for these groups.
- 59.** Do you have preferred tools for managing the software development process?
o Jira? Microsoft TFS? Git?
Response: THECB uses Azure DevOps.
- 60.** Do you have a preferred software development methodology? o Waterfall, Agile, Hybrid-agile, or others.
Response: THECB utilizes the Agile development methodology.
- 61.** Are there documentation requirements that must be met for the application, processes, and/or technical requirements?
Response: Architectural design documentation and technical documentation are required, along with training guide, process documentation, and other documentation that will help knowledge transfer.
- 62.** Do you have any preference of any Web Analytics Tool?
Response: See answer to Question 16.
- 63.** What is the current user traffic/day ? Number of total and unique visitors by day, week, and month?

Response: This information will be provided to the selected vendor as part of the discovery process.

64. Does the scope includes the Data Migration from all the existing sites/portal to the new or Unified site . If yes , What is the Size of Data to be migrated for each Web Site & Web Portal ?

Response: See answer to Question 56.

65. How many new reports(Simple , Medium , Complex) are to be developed as part of new Unified experience?

Response: THECB has not identified new reports at this time. See answer to Question 22.

66. Please provide the High Level Architecture diagram & Technical Stack of the systems in place which are to be provided unified experience?

Response: the agency's existing application portfolio is made up of ColdFusion and .Net C# applications. Backend database: SQL and MySQL. Content management systems: Mura and FarCry.

67. How many web sites and Web Portals are to be integrated with the Unified Web Portal ?

Response: See answer to Question 22.

- o Please provide the details of Web Portals(Internal & Public sites)

<https://www.highered.texas.gov/data-reports/>

- o What is the technology stack behind these Source websites & Web Portals?

Response: THECB's existing application portfolio is made up of ColdFusion and .Net C# applications. The backend databases are in SQL and MySQL. The current content management systems include Mura, FarCry, and WordPress; however, the agency is moving toward consolidating all content management in WordPress.

- o How many reports(Simple , Medium , Complex) in each Website/Webportal are Self service Driven through Data Visualization Tools & How many are being managed through CMS.

Response: The majority of the existing reports are generated by WebFOCUS and custom applications.

- o What is the data format(Excel , JSON , API exposure) in which the Unified Portal gets the data from multiple Website/Web Portals ?

Response: The unified portal will access data by calling API services.

- o For data migration, please suggest from how many past years data should be considered for content migration?

Response: See answer to Question 56.

- o Are you performing data calculation and data filtration mechanism while generating the reports at websites?

Response: Yes, in some cases data calculations and filtration is performed while generating the reports.

68. Do you want to support containerization and Multi Tenant Architecture ?

Response: THECB is not using containers at this point. Architecture design for the future site will be addressed during the planning and design phase of the project.

69. Please provide the details on the current No of users for each web site / Web Portal . database size, number of documents and total document size to be migrated for each website/Web portal ?

Response: Current utilization metrics will be shared with the selected vendor. This portal is a redesign of data provisioning so a direct migration from existing sites is not contemplated.

70. Do you have any preference on the CMS workflow for publishing the page content and reports at live website? If , Yes please provide the details.

Response: THECB uses WordPress as its content management system and prefers to use the WordPress workflow plugin.

71. Could you please provide the specifics on Cloud native deployment which are preferred or Mandatory for the Unified portal to be deployed ? This is required for estimate purpose.

Response: The agency is using Azure cloud and the WordPress instance is hosted in Azure. We prefer to use cloud native services and components.

72. There are plenty of WordPress plugins name mentioned at page 8, section 3.03.03. Where and at which WordPress website are you using them? Kindly clarify.

Response: THECB is currently redesigning two of its websites in WordPress with various use of the plugins listed, however, the sites are not yet publicly launched.

73. Are you looking for WordPress based solution only or open for custom build solution as well?

Response: See answer to Question 14.

74. Please share the details around current login system being used by the THECB, is it custom build or LDAP or Azure AD or SAML based authentication, etc.?

Response: THECB uses Azure AD for user access management and authentication.

75. Is there any specific feature work needed for THECB website or any areas behind the login which we cannot currently see?

Response: There are no areas relevant to this RFO behind the login.

76. Whose responsibility is content creation and other media assets like videos etc. at new website?

Response: THECB will be responsible for content other than data visualizations to be developed as part of this RFO. However, vendor will provide all graphical assets outside of THECB logo files, but assets must align with brand standards.

77. Will THECB be responsible for procuring the hosting environments i.e. – production, staging and testing etc. and awarded vendor will help in deploying the new website within your hosting environment/cloud?

o What hosting environment is expected to be used?

Response: The vendor will be responsible for hosting the environments up until deployment, when everything will be transferred to THECB's permanent hosting environment.

78. Please confirm the time zone and language for training.

Response: The training will take place in the Central Time Zone and in English.

- 79.** Please share the details of various entities who will be using the application and backend such as admin or other users.

Response: See answer to Question 27 for information on users. Other users include administrators.

- 80.** Do you have an admin backend in place or you want us to create it from scratch?

Response: WordPress, as the content management system, has an administrator built in. If other solutions are proposed, administrator credentialing will need to be discussed.

- 81.** Will there be any Signup/Login requirements for the mobile app users?

Response: There are no signup or login requirements for users.

- 82.** Do you want the vendor to propose all open source tools or can they propose paid/licensed tools for visualization, report, etc?

Response: The vendor is free to propose tools, however, THECB has selected WordPress as the content management system and PowerBI for reporting and dashboards.

- 83.** Will the mobile app support portrait/landscape orientations?

Response: Yes, the mobile version should render in both portrait and landscape orientations.

- 84.** Will the vendor be expected to perform a full user-centered design (UCD) process (e.g. create personas and user scenarios, conduct user interviews, create prototypes, user testing, etc.)?

Response: THECB desires a user-centered design process that informs product development.

- 85.** Are there design standards that the UI/UX team should follow?

Response: See response to Question 24.

- 86.** Will THECB provide all of the graphical assets (e.g. logos, icons, etc.)?

Response: The vendor will provide all graphical assets outside of THECB logo files, but assets must align with brand standards as set forth in section 3.02 of the RFO.