

# TEXAS HIGHER EDUCATION COORDINATING BOARD

## Request for Offers (RFO) ApplyTexas Development

RFO No. 781-3-28085

Questions and Answers  
October 12, 2022

1. Has funding been allocated? If so, how much is the anticipated value of the resulting contract?

**RESPONSE:** Yes, funding has been allocated. This is a competitive solicitation; we are unable to provide the anticipated value of any resulting contract.

2. What is the contract term of this project? Base term and renewal?

**RESPONSE:** Please see section 6 of the RFO. The Contract Term will be negotiated prior to execution of any awarded contract.

3. Can you provide any additional information on the Texas.gov payment processing capabilities?

**RESPONSE:** Please see: <https://bit.ly/3Vk3tdM>; and: <https://bit.ly/3ChMHD5>.

4. Do you have a preference for vendor hosted vs. THECB hosted solutions?

**RESPONSE:** No preference.

5. In order to properly plan and budget for a data migration, it would be helpful to know more about the current state of the data. Can you provide any extra info that

would help us understand the volume, complexity, and current organization/structure of the existing data?

**RESPONSE:** The current system is using the Postgresql-flavor of Amazon Aurora on AWS to store:

- Applicant and application data (54 tables)
- Administrative parameters for the customization of applications (30 tables)
- Imports of FAFSA and TASFA data
- Institution of Higher Education and High School Counselor authorizations
- Lookup values (e.g., high schools, colleges, counties, regions, countries) (25 tables)

Those tables total more than 100 GB. The application is also using DynamoDB to store application data that has been formatted in EDI and Cognito to manage access for the three end user portals.

The application is using a serverless Amazon Aurora implementation of Postgres to store archived applicant and application data:

- 2200 administrator authorization records
- 2900 counselor authorization records
- Over 1.6 million active applicants
- Almost 2.5 million active started applications
- Over 1.7 million active submitted applications
- 17.1 million archived applicant accounts
- 15.1 million archive applications

6. The requirements refer to “other data sources” - can you be more specific about what these sources are?

**RESPONSE:** To be decided between the selected vendor and THECB. Potential sources include IPEDS, CredentialRegistry, and data within Tri-Agency data stores.

7. Will any preference be given to Texas-based companies?

**RESPONSE:** Preferences are established by Texas statute, to the extent applicable to this solicitation. Respondent must claim any applicable preference(s) in its proposal by making the appropriate preference on the preference form included in the solicitation (Attachment B).

8. Does the student select institutions specifically or is it for all institutions associated with ApplyTexas?

**RESPONSE:** The students choose the institutions to which they will apply.

9. Does ApplyTexas currently use/leverage an ETL tool for integrations and/or is this an option to accommodate the many identified integrations (SIS, CRM, etc.)? If so, which tool is used? If not, is ApplyTexas open to the use of an ETL tool?

**RESPONSE:** We have a strong preference to use an ETL tool. The current application supports a variety of custom integrations but does not use an ETL tool. It does provide a data extract to the THECB data warehouse.

10. Does the ApplyTexas application have direct or indirect connections to the Common Application process?
- If so, could that data from the Common App be referenced alongside the information from ApplyTexas?
  - If not, is there an interest in collaborating data within the CRM for ApplyTexas?

**RESPONSE:** There is no current connection between ApplyTexas and the Common Application. THECB is open to potential connections, subject to meeting privacy requirements.

11. What tracking metrics are being used currently for student applications?
- Admissions?
  - Acceptance by Student?
  - Matriculation?

**RESPONSE:** All three of those data points are currently tracked.

12. Are there any marketing projects planned for advertising ApplyTexas or other engagement campaigns?

**RESPONSE:** Yes, there is a marketing and communications function for ensuring that Institutions of Higher Education (IHEs), K12, and students are aware of ApplyTexas.

13. What is the current communication plan for applicants that have submitted an application?
- Does each school communicate or are there universal communications?

**RESPONSE:** ApplyTexas confirms receipt, at which point each school takes over communication to its applicants and matriculants.

14. Based on information presented in the RFO, please confirm THECB's desire to have the new ApplyTexas system built as a custom development effort versus utilizing a configurable COTS regulatory management solution.

**RESPONSE:** THECB is open to off-the-shelf solutions as long as they meet all requirements in the RFO.

15. Can THECB identify specific standards for security and encryption stated within requirement 3.2.2.4 of the RFO?

**RESPONSE:** THECB Security follows NIST/TXRAMP/TCF/FIPS standards.

16. Requirement 3.2.1.16 implies the implementation of the new ApplyTexas system to be completed by July 1, 2023. Given the scope and the complexity of the project, this may not be feasible. What is driving the specified timeline?

**RESPONSE:** That is when the application cycle for opens for students applying during school year 2023-2024.

17. Is THECB open to a proposal that extends beyond 12 months for initial system implementation?

**RESPONSE:** Compliance with the RFO's timeline will be preferred; however, Respondent should submit realistic timelines for the scope of its proposed solution(s). Respondent's proposed timeline(s) will be considered as a part of THECB's Evaluation Criteria listed in section 11 of the RFO.

18. Requirement 3.2.2.6 implies the vendor is to provide a "network of helpdesks" directly to users, including students. Please elaborate on THECB's vision for this requirement, including potential personnel, hours of availability, etc. that would help vendors properly scope this requirement and subsequent costing.

**RESPONSE:** The current help desk is supported by three full-time staff covering Monday-Friday from 8:00 a.m.-6:00 p.m. during typical operation. At the beginning and end of application cycles, the team provides evening and weekend coverage, which extends to 24-hour coverage leading into December 1.

19. What costs has THECB incurred for the initial set up, ongoing maintenance, hosting, software licensing, support, and enhancements (i.e., "change orders") over the lifetime of the current systems to be replaced by the new solution?

**RESPONSE:** This question is outside of the scope of this RFO.

20. What presentations, software demonstrations and/or estimates / quotes has THECB programs received related to the ApplyTexas project and from whom?

**RESPONSE:** This RFO forms the basis for awarding the next phase of the ApplyTexas project.

21. For data conversion requirements, please inventory all data sources, file formats, and size of the current data sets to be converted and migrated into the new ApplyTexas system, including systems identified in requirement 3.2.2.4.

**RESPONSE:** See question 5

22. What is THECB's budget for the new solution and what does the budget intend to cover?

**RESPONSE:** See question 1

23. What has THECB budgeted for both initial system implementation (through July 1, 2023) and ongoing licensing, support, and maintenance?

**RESPONSE:** See question 1

24. What, if any, amount of the budget is subject to expire by a certain timeframe and when? Such as in the case of any grant(s) associated with the project. Please elaborate.

**RESPONSE:** See question 1

25. Please provide an approximate number of standard email/letter templates that will be used by THECB that are to be integrated and automated by the system.

**RESPONSE:** Fewer than twenty-five (25).

26. How many different or distinct application types will be supported in this solution? Please provide a comprehensive list.

**RESPONSE:** There are eleven (11) application types: two-year, US freshman, US graduate, US transfer, international freshman, international graduate, international transfer, readmit, transient, dual credit, and scholarship.

27. Please identify ALL other systems that the new solution will need to integrate with (i.e. payment processor, other systems such as financial, etc.) along with an inventory of which interfaces will need to be wither a one-way (import or export) or two-way data exchange?

**RESPONSE:** Please see the RFO text for a comprehensive list.

28. Please provide the annual number of applications currently processed by THECB?

**RESPONSE:** See question 33.

29. Please provide a breakdown of the number of State employees that will be using the new solution by THECB Program and role.

**RESPONSE:** ApplyTexas needs to be flexible to support a variable number of employees with different roles.

30. Given the complexity of the RFO, extensive requirements, etc. can the State extend the proposal due date by at least 2-4 weeks?

**RESPONSE:** No.

31. Will selected vendor have the opportunity to provide exceptions and/or alternative contract language during contract negotiations, or will vendors need to provide those within their respective proposals?

**RESPONSE:** Please provide all known exceptions with the proposal.

32. Can THECB provide an inventory of all the reports that need to be replicated within the new system?

**RESPONSE:** Specific reports to be worked out between THECB and selected vendor. Current reports include:

- Nightly report of ADVi (chatbot)-applicable data sent to THECB
- Nightly report of submitted application data sent to THECB data warehouse
- Daily application counts
- Monthly report of the number of times individual counselors logged in over previous month and year
- Monthly report of the number of individual applicants from Texas high schools over the current academic year (8/1 - 7/31) broken down by high school and grade level
- Monthly report of the number of applications from Texas high schools over the current academic year broken down by high school and grade level
- Weekly report of the number of applicants from Texas high schools broken down by high school and grade level over one of the two active ApplyTexas cycles (Summer through the following Spring)

- Weekly report of the number of applicants from Texas high schools broken down by high school and grade level over the other of the two active ApplyTexas cycles (the following Summer through the following Spring)
- Daily reports of admissions applications and FAFSA applications for Dallas Promise/Commit

33. How many total admissions applications have been processed annually on average for the last 3 years? What is the breakdown by applications to undergraduate, graduate and community college schools?

**RESPONSE:**

2022-23 cycle (incomplete) started/completed:

- Two Year: 733,832 / 642,736
- Undergraduate: 1,134,170 / 735,575
- Graduate: 189,137 / 130,403
- Scholarship: 46,306 / 31,483

2021-22 cycle started/completed:

- Two Year: 720,497 / 657,099
- Undergraduate: 1,023,425 / 740,234
- Graduate: 193,667 / 140,677
- Scholarship: 58,401 / 30,584

2020-21 cycle started/completed:

- Two Year: 727,176 / 664,559
- Undergraduate: 1,097,994 / 793,568
- Graduate: 167,338 / 121,092
- Scholarship: 57,504 / 29,191

2019-20 cycle started/completed:

- Two Year: 824,364 / 765,180
- Undergraduate: 1,120,112 / 800,995
- Graduate: 156,719 / 112,261
- Scholarship: 108,169 / 50,395

34. Can you provide the number of campus-based tools to which integration is required (i.e., how many are using Slate, TargetX, and other CRMs) and clarify if integration

to the campus SIS is required and for which SIS and how many? (i.e., how many are using Banner, Workday, PeopleSoft, Colleague)?

**RESPONSE:** Only Slate integration is a requirement. Additional integrations are preferred. We do not have data on SIS/CRM/ATS share within IHEs, but are willing to work with selected vendor to survey institutions to better understand usage.

35. Are the items listed for the Counselor Portal (i.e., to help students complete the ApplyTexas app, upload of coursework and GPA, FAFSA and TESFA integration) already in use or is this portal a new item? If it already exists, can we obtain a Demo of the Counselor Portal so we can see how it is being used today and what is included? Could we also receive system and user documentation?

**RESPONSE:** The Counselor Suite exists today. To see a walkthrough of functionality, go here: [https://www.youtube.com/watch?v=x55y\\_qqu21A](https://www.youtube.com/watch?v=x55y_qqu21A).

36. For single sign on, what tools are included, for what use cases, and in support of what users' experiences? Is it a must to be Azure based?

**RESPONSE:** SSO must be Azure AD-based to enable students to move among THECB properties efficiently.

37. In terms of legacy data, how far back in time is historical data required, what is the expected use for this data, and for what users' experience is this to be used?

**RESPONSE:** Two years storage of student data and IHE questions.

38. Is the Texas Higher Education Coordinating Board looking to use the same model for private colleges?

**RESPONSE:** ApplyTexas will provide an equitable experience for all participating public and private institutions of higher education.

39. What is the budget for this project and what is the source of funding? Do participating colleges pay a fee? Is a portion of the application fees paid by students used to support ApplyTexas? Is Texas Higher Education Coordinating Board open to other funding sources versus what is currently in place?

**RESPONSE:** See question 1. THECB receives funding from many sources and is open to additional funding. Currently, there is a prescribed methodology for the cost of ApplyTexas under Title 19 Texas Administrative Code § 4.11(h)(1)-(4).

Participating institutions may charge a reasonable fee for the filing of the application. Operating costs are paid for by all institutions required to use the state's common application plus independent and health-related institutions that



contract to use ApplyTexas. Each participating institution pays a portion of the cost based on the percentage of its enrollment compared to the total enrollment of all participating institutions based on the certified enrollment data of the most recent fall semester.

40. Can the Texas Higher Education Coordinating Board extend the submission date to 11/9 to allow for a cohesive response inclusive of answers to questions?

**RESPONSE:** No.

41. Can you provide details on the payment processing through Texas.gov? Is it mandatory that we use this payment processor or is Texas Higher Education Coordinating Board open to other commercially used entities that are also PCI compliant?

**RESPONSE:** See question 3. Use of payment processing through Texas.gov is mandatory.

42. Is linking to institution & employment data simply that, or will the vendor be responsible for creating this information with the participating colleges?

**RESPONSE:** Vendor is not required to generate additional data. The outcome here is to connect to existing data sets.

43. What is the use case for a downloadable, fillable PDF? How many such applications are submitted each year?

**RESPONSE:** Students and families without computers or internet access need a way to submit applications. We do not track paper applications and, thus, are unable to provide this information.

44. Will Texas Higher Education Coordinating Board consider a phased approach? Will the Texas Higher Education Coordinating Board consider an approach where a vendor provides the application portal to start and integrates with existing items in use today while developing replacements/enhancements over a longer period?

**RESPONSE:** All requirements and timing are laid out in the RFO.

45. Would you please provide a better sense of deliverables and timeline of the entire project. Various dates are listed through the document as deadlines in March, May, July, and September of 2023 as we want to ensure a clear understanding of what is needed on each of those dates.

**RESPONSE:** See relevant sections of RFO.

46. Would you be open to a vendor proposed development cycle and go live date if it was longer than that discussed in the rfo but needed for a comprehensive result?

**RESPONSE:** No.

47. Can we get details of the single sign on functionality desired with Azure/AD? What users (e.g., school staff, high school counselors, students) would be included in this identity management?

**RESPONSE:** Students are the primary users, with use by K12 and IHE staff as well so that they can access other THECB properties efficiently.

48. What specific historical data does the team expect to migrate?

**RESPONSE:** Application data, including student applications and IHE questions.

49. Is it THECB's preference or intention to a.) have the awarded vendor host and maintain the ApplyTexas system, or b.) host and maintain at THECB, or c.) host and maintain on a state campus?

**RESPONSE:** THECB's preference is either (a) or (b).

50. Which of the following student applicant types will be included? 2-year, 4-year, Graduate, Certificate, Transfer, from Freshman, Transient, Readmit, International, Adult, Online, credit seekers, or other?

**RESPONSE:** See question 26.

51. Who are the members of the ATAC (ApplyTexas Advisory Committee)?

**RESPONSE:** See here: <https://www.highered.texas.gov/about-us/advisory-committees/applytexas-advisory-committee/>.

52. Do individual schools control their open/close dates for their individual application(s)?

**RESPONSE:** Yes.

53. What is the Number of started applications per year? Number of completed/submitted applications per year? Number of unique applicants per year?

**RESPONSE:** See question 33.

54. Is there a standard integration to SIS in Texas high schools, or a centralized system, to integrate data? Counselors, FAFSA use?

**RESPONSE:** There is not—the selected vendor and THECB will work together to identify priority SISs for integration.

55. Who staffs the Helpdesks? What is their function?

**RESPONSE:** See question 18.

56. Should the awarded provider serve commercially available software that does not require development, would THECB still expect to own the intellectual property?

**RESPONSE:** THECB expects to own the intellectual property to any developed code or product. Existing patterns and libraries that are licensed or used via open-source protocols will obviously not be THECB property.

57. Should the awarded provider serve commercially available software that does not require development, would THECB still expect to own the intellectual property?

**RESPONSE:** Vendor submitted a repeat question, see question 56.

58. What is the current annual schedule and format to accept updates in the current system?

**RESPONSE:** Updates to application questions/format are received in the spring and loaded for a changeover in the summer.

59. What is the purpose of the fillable PDF? Is this for each institution, by degree? Please describe this requirement in more detail

**RESPONSE:** See question 43.

60. Does the company bidding on this contract need to be from Texas?

There are a few items requested

- Texas Tax ID
- Texas Family Code
- Texas Govt code

**RESPONSE:** See question 132.

61. Is there a current system to match potential students with career interests and corresponding programs/requirements across the State of Texas?

**RESPONSE:** The development of My Texas Future, for launch Fall 2022, aims to meet this need.

62. How much (if any) interaction does THECB anticipate users, IHE's, and K-12 institutions will have with one another? If so, in what format? SMS? WhatsApp? Email?

**RESPONSE:** Today ApplyTexas does not facilitate any of these connections or interactions, but THECB could certainly see value in these connections and is open to proposed solutions.

63. How much of the FAFSA/TAFSA information will high school counselors need/have access to? Will this include only submission status or will there be an indicator that a student qualifies for significant financial assistance (ie: Pell) while protecting income privacy? (Context: Many times students, and especially their parents, do not think they will qualify for anything and do not apply, or do not understand when they get the results, therefore they often need guidance).

**RESPONSE:** THECB is interested in counselors having as much access to FAFSA/TAFSA data as is allowable under privacy regulations. Through an agreement with the Department of Education, THECB is able to provide a student's name, date of birth, FAFSA completion status, submission date, processed date, and if a student is selected for verification in the ApplyTexas Counselor Suite.

64. Does THECB anticipate additional support for first generation or ESL students from high school counselors or IHE's?

**RESPONSE:** That kind of support could be very helpful and THECB is interested in hearing more about any proposal.

65. Does THECB anticipate support for parents of high school students? Particularly those who are first generation or ESL students? (According to EAB in the senior year of high school parents are 75% more likely to have the final say on where a student attends.)

**RESPONSE:** That kind of support could be very helpful and THECB is interested in hearing more about any proposal.

66. Does THECB anticipate a need for connections to faculty advisors or student success advisors from IHE's either now or in the future? (For example, to describe program requirements/career outcomes etc.)

**RESPONSE:** Those connections could be helpful, and could certainly be a part of an ApplyTexas that helps propel students to high-quality programs.

67. Does THECB anticipate events management (virtual or otherwise) for example, college and career fairs, informational sessions regarding FAFSA/TAFSA, program/institution specific informational webinars, etc.?

**RESPONSE:** Those sorts of events are desirable as they help support different user groups. ApplyTexas will integrate with My Texas Future for K12 students, which will be in parallel development. The selected vendor will be required to work with the My Texas Future vendor to ensure coordination of services and functionality. For example, it may be the case that events management is a function within My Texas Future.

68. What levels of support for applicants in the application process does THECB anticipate requiring?

- a. Will there be different groups/support areas for specific application areas (Financial Aid, Scholarships, Admissions Criteria)?

**RESPONSE:** Beyond the Helpdesk itself, THECB seeks an ApplyTexas application that itself helps propel students through product design to high-quality programs where they are likely to succeed and gain a credential of value. Specific design on financial aid versus scholarships versus admissions criteria will be decided between THECB and selected vendor.

69. Is there a planned system of record for applicant information?

**RESPONSE:** ApplyTexas is the system of record.

70. Are applicants able to make edits to their applications after submission?

**RESPONSE:** Not currently.

71. Can IHEs or K-12 Partners make edits to applications or append documentation to them?

**RESPONSE:** Outside of recommendation letters, no.

72. Salesforce (Licensing) Questions

- a. How many users of the 3 groups are anticipated for this solution?
- Applicants

- Institutions of Higher Education
- K-12 Partners

**RESPONSE:** Hundreds of thousands of students apply through ApplyTexas. One hundred eighteen (118) IHEs use ApplyTexas. There are 3,000-3,500 high schools in Texas. Each of these institutions can have multiple users.

- b. What is the count of internal users (THECB Staff) that would need access to this solution?

**RESPONSE:** Enough to maintain the system.

- c. Will the User Groups of IHEs and/or K-12 Partners require multiple users per institution or partner organization?
- Will there be any shared access to data across these users/accounts?

**RESPONSE:** Some institutions may require multiple users, and some may share access.

- d. Can THECB share the historical volume of monthly/annual inbound requests for support through the Helpdesk?

**RESPONSE:** See question 18.

- e. How many staff are currently supporting Helpdesk operations today?

**RESPONSE:** See question 18.

- f. Does the THECB expect the vendor to provide staffing & administration for Helpdesk services?

**RESPONSE:** Yes.

73. RFO SECTION NUMBER – 3.1.7

RFO PAGE NUMBER – Page 4

TEXT OF PASSAGE BEING QUESTIONED – If proposing a new system to be hosted by THECB, develop the site within the Microsoft Azure cloud, using cloud-native architecture and processing tools.

QUESTION – Can THECB confirm if ApplyTexas is currently hosted on prem at UT? If not hosted on prem, which cloud service provider is currently used?

**RESPONSE:** ApplyTexas is currently hosted on Amazon Web Services (AWS).

74. RFO SECTION NUMBER – 3.1.9

RFO PAGE NUMBER – Page 4

TEXT OF PASSAGE BEING QUESTIONED – Provide the option of customer support via live telephone conversations and other means, including email with a one (1) business day response time and an online knowledge base. THECB may opt to contract for this service separately. Respondent should provide pricing specific to customer support.

QUESTION – Can THECB confirm the volume of current support inquiries via email & phone? Who currently support these efforts? Are customer support logs available to review?

**RESPONSE:** The current help desk supports email queries but not phone calls. Daily averages are one hundred (100) Applicant contacts, ten (10) Higher Education contacts, and five (5) High School Counselor contacts. Peak times are busier.

75. RFO SECTION NUMBER – 3.2.1.1

RFO PAGE NUMBER – Page 5

TEXT OF PASSAGE BEING QUESTIONED – Synthesize existing data and research on what works for propelling learners to apply and matriculate to programs with high completion rates into a product strategy.

QUESTION – Will THECB provide the data and research to be synthesized, or will we be gathering the material? Is THECB open to utilizing the existing research to launch further research efforts?

**RESPONSE:** THECB is happy to point selected vendor in the general direction of existing research, but expects vendor to discover and consolidate findings. THECB is very interested in further research efforts.

76. RFO SECTION NUMBER – 3.2.1.6

RFO PAGE NUMBER – Page 5

TEXT OF PASSAGE BEING QUESTIONED – Propose a consolidation of data elements and questions, if possible, that speed student completion while maintaining IHEs' ability to complete their work and meet their mission.

QUESTION – Will THECB facilitate communication with IHEs to ascertain their needs/goals, in order to facilitate this ask?

**RESPONSE:** Yes.

77. RFO SECTION NUMBER – 3.2.1.13

RFO PAGE NUMBER – Page 6

TEXT OF PASSAGE BEING QUESTIONED – Develop a content strategy that prioritizes equity and Search Engine Optimization (SEO).

QUESTION – Does content need to be translated into additional languages (other than English) by the Awarded Respondent?

**RESPONSE:** This is not a requirement, but THECB is open to proposals for Spanish-language translation.

78. RFO SECTION NUMBER – 3.2.2.2

RFO PAGE NUMBER – Page 6

TEXT OF PASSAGE BEING QUESTIONED – THECB is interested in delivery mechanisms that automatically integrate data into common CRMs and Student Information Systems (SISs) via Application Programming Interface (API).

QUESTION – Can THECB confirm that no front-facing portal is expected to be developed for IHE users? Only an API?

**RESPONSE:** The current application supports a front-facing portal for IHE users called the Administrator Suite. Application delivery is currently supported via the National Student Clearinghouse, which delivers files to schools in EDI format. The current version of ApplyTexas provides a desktop application written in Java to allow IHEs to view EDI files and convert them into plaintext. That format conversion is currently being incorporated into the Administrator portal and the Java application will be retired.

79. RFO SECTION NUMBER – 3.2.2.10

RFO PAGE NUMBER – Page 7

TEXT OF PASSAGE BEING QUESTIONED – Provide set-up and training for all participating institutions served through the ApplyTexas system.

QUESTION – Can THECB confirm the expected subject matter of the training (e.g., how to use the content management system (CMS), site strategy, writing for web, marketing, etc.)? How does THECB define “set-up” (e.g., creation of CMS roles, provisioning individual user access, etc.)? Can THECB confirm the expected number of IHEs participating and requiring support with set-up and training?

**RESPONSE:** Webinars have traditionally been utilized for training, but THECB is open to other proposed methods of training.

80. RFO SECTION NUMBER – 3.2.2.12

TEXT OF PASSAGE BEING QUESTIONED – Propose content and programmatic updates to other Tri-Agency (THECB, Texas Education Agency, and Texas Workforce Commission) digital properties that reference or support ApplyTexas.

QUESTION – Will the Awarded Respondent need to work with Tri-Agencies to obtain their approval of proposed content updates or will THECB coordinate the effort?

**RESPONSE:** THECB will coordinate this effort.



81. REFERENCE – Section 1. Introduction, P. 1  
QUOTE – The technology stack of ApplyTexas is currently hosted and maintained by an outside institution, the University of Texas at Austin, under contract with and at the direction of THECB.  
QUESTION – Describe the technology stack currently hosted by the University of Texas at Austin in support of the ApplyTexas system.

**RESPONSE:** See question 5.

82. REFERENCE – Section 1. Introduction, P. 1  
QUOTE – THECB's new strategic plan, Building a Talent Strong Texas, sets a goal that at least 60% of working-age Texans (25-64) will attain a postsecondary credential of value by 2030. Texas institutions of higher education will propel graduates into lasting, successful careers that equip them for continued learning and greater earning potential, with no or 2 manageable debt. Higher education institutions will accelerate research, development, and innovation to ensure Texas remains competitive into the future  
QUESTION – What are the current limitations or areas of improvement for the ApplyTexas system in support of the newly defined THECB goals?

**RESPONSE:** This is the basis for issuing the RFO. The selected vendor will receive research conducted on current pain points for users within the ApplyTexas tool.

83. REFERENCE – 1. Introduction, P. 1  
QUOTE – a network of Helpdesks designed to respond to the needs of applicants, institutions, and high school counselors  
QUESTION – How many “networks”? How many agents? How many calls/tickets logged each month? What hours and what days do the agents work?

**RESPONSE:** See question 18.

84. REFERENCE – 1. Introduction, P. 1  
QUOTE – a network of Helpdesks designed to respond to the needs of applicants, institutions, and high school counselors  
QUESTION – Do you want to consolidate/reduce the number of Helpdesks in the network? What is that number? Do you want to provide 24/7 support with this initiative?

**RESPONSE:** No preference on number of Helpdesks, as long as coverage is provided. Support can be provided during working hours.

85. REFERENCE – 1. Introduction, P. 1  
QUOTE – a goal that at least 60% of working-age Texans (25-64) will attain a postsecondary credential of value by 2030

QUESTION – What is the current %? Has that trended up or down over the past 5 years?

**RESPONSE:** This is not within the scope of the RFO.

86. REFERENCE – 2.2 Qualifications, P. 3

QUOTE – Management Resumes

QUESTION – What do you mean by Management Resumes? Will a Project Manager resume be sufficient?

**RESPONSE:** All Management Team resumes are required.

87. REFERENCE – Section 3.2 Deliverables and Service Requirements, P.4

QUOTE – ...the state must have an ApplyTexas system that better serves three key groups of users: applicants, institutions of higher education, and K-12 partners. T

QUESTION – What is the number of admission applications per year

What is the number of scholarship applications per year

What is the number of institutions of higher education

What is the number of K-12 Partners# of portals in place today

What is the number of users per role, students, counselors, administrators, partners (higher ed and K-12)

**RESPONSE:** See questions 5 and 33.

88. REFERENCE – Section 3.1.5, P. 4

QUOTE – Integrate Identity and Access Management with THECB's Azure AD/Azure AD B2C architecture.

QUESTION – Is THECB's Azure AD/Azure AD technology currently being used for identity and access management across all current ApplyTexas users? (Applicants, users from institutions of higher education, users from K-12 Partners)

**RESPONSE:** No, see question 5.

89. REFERENCE – Section 3.1.9, P. 4

QUOTE – Provide the option of customer support via live telephone conversations and other means, including email with a one (1) business day response time and an online knowledge base. THECB may opt to contract for this service separately. Respondent should provide pricing specific to customer support.

QUESTION – Please provide clarification around the expectations of this? How many telephone calls are done each month currently? What other “means” or channel are used today? How many each month? What is the current response time?

**RESPONSE:** See question 74.

90. REFERENCE – Section 3.2.2.2, P. 5

QUOTE – Synthesize existing data and research on what works for propelling learners to apply and matriculate to programs with high completion rates into a product strategy

QUESTION – Please provide clarification around the expectations of this? What analytics have been previously implemented? Can you provide documentation on previous results?

**RESPONSE:** There has been significant research and documentation on what works for propelling learners to apply and matriculate to programs with high completion rate. THECB is happy to point selected vendor towards the highest-quality research, but selected vendor will be responsible for creating a cohesive strategy for driving equity.

91. REFERENCE – Section 3.2.1.7, P. 5

QUOTE – Implement controls to reduce false negatives

QUESTION – Can you provide an example of a false negative? How many per month?

**RESPONSE:** A student filling out the FAFSA might select the wrong high school, which causes an error in matching the student data in the ApplyTexas Counselor Suite. A partner has estimated the false negative rate at 15%.

92. REFERENCE – Section 3.2.1.8, P. 5

QUOTE – Build an integration with key district Student Information Systems to allow importing of existing records such as grade point average (GPA) and course history.

QUESTION - What are the key district Student Information Systems the new ApplyTexas solution should integrate with?

**RESPONSE:** To be agreed upon between THECB and selected vendor.

93. REFERENCE – Section 3.2.1.10, P. 5

QUOTE – Propose strategies to create common student identifiers that allow for real time data exchange across Texas systems, including potentially aligning with Ed-Fi version 3 (information available here: <https://techdocs.ed-fi.org/>).

QUESTION - Is there currently a unique identifier used as a standard method of connecting data in the ApplyTexas solution?

**RESPONSE:** Currently, there is not a way to connect student ApplyTexas records to other data sources across the Tri-Agency systems.

94. REFERENCE – Section 3.2.1.13

QUOTE – Develop a content strategy that prioritizes equity and Search Engine Optimization (SEO).

QUESTION - What current technologies are being used? Do you want to leverage the current technology or has the decision been made to move in another direction?

**RESPONSE:** There are no current tools dedicated to SEO.

95. REFERENCE – Section 3.2.2.2, P. 6

QUOTE – Allow for delivery of data directly into application management tools used by IHEs, namely Slate, Workday, and Salesforce.

QUESTION - Explain integration requirements of ApplyTexas with Slate, Workday. Real time? Bi-Directional?

**RESPONSE:** Real time is not required. There is no current requirement for bi-directional, but THECB is open to proposals for use of return data.

96. REFERENCE – Section 3.2.2.6, P. 7

QUOTE – Maintain a network of Helpdesks designed to respond to the needs of applicants, institutions, and high school counselors.

QUESTION - Is the intent to outsource the helpdesk? Is this for functional or technical support? What are the expectations?

**RESPONSE:** Vendor will maintain the helpdesks to support the needs of users, both technical and functional.

97. REFERENCE – Section 3.2.2.6, P. 7

QUOTE – Maintain a network of Helpdesks designed to respond to the needs of applicants, institutions, and high school counselors.

QUESTION - Describe capabilities of current network of Helpdesks designed to respond to the needs of applicants, institutions, and high school counselors.

**RESPONSE:** See question 74.

98. REFERENCE – Section 3.2.2.7, P. 7

QUOTE – Support IHEs on integration and data transition through September 30, 2023.

QUESTION - What is the volume of historical data expected to be maintained in the new/enhanced ApplyTexas solution?

**RESPONSE:** The previous year's application data.

99. REFERENCE – Section 3.2.10, P. 7

QUOTE – Provide set-up and training for all participating institutions served through the ApplyTexas system.

QUESTION - What is your current in-house salesforce admin/ development capability?

**RESPONSE:** The THECB technology team owns and maintains the current Salesforce environment and instances. As new development work is needed vendors are sometimes engaged.

100. REFERENCE – Section 3.2.2.10, P. 7

QUOTE – Provide set-up and training for all participating institutions served through the ApplyTexas system.

QUESTION - What are your current internal training capabilities? Is there an existing training/learning function?

**RESPONSE:** An annual summer training for administrative and technical users is provided along with regular meetings of the ApplyTexas Advisory Committee. THECB is open to proposals on more comprehensive training options.

101. REFERENCE – Section 3.2.2.3, p. 6

QUOTE – Allow for delivery of data directly into application management tools used by IHEs, namely Slate, Workday, and Salesforce

QUESTION - What are the existing integrations today – anything beyond Slate, Workday and Salesforce?

**RESPONSE:** There is no current integration into these systems.

102. REFERENCE – Section 3.2.2.3, p. 6

QUOTE – Allow for delivery of data directly into application management tools used by IHEs, namely Slate, Workday, and Salesforce

QUESTION - What middleware is currently in use?

**RESPONSE:** There is no current integration into these systems. THECB is open to middleware proposals as part of a proposed solution.

103. REFERENCE – Section 5.1, p. 9

QUOTE – Respondent's pricing must be all-inclusive, covering all services, costs, and fees required to provide all deliverables described in this RFO, including personnel costs and all other necessary expenses required in the performance of the contract or purchase order.

QUESTION - Is the expectation that licenses will be included in this cost – is this is a single source contract for both licenses and services?

**RESPONSE:** Yes.

104. REFERENCE – N/A

QUOTE – General

QUESTION - Are expectations that services will be delivered remote / hybrid / in-person ?

**RESPONSE:** No expectations.

105. REFERENCE – N/A

QUOTE – General

QUESTION - Can the RFP submission date be extended?

**RESPONSE:** No.

106. REFERENCE – N/A

QUOTE – General

QUESTION - What is the current number of Salesforce Licenses?

**RESPONSE:** Enough to cover project needs.

107. REFERENCE – N/A

QUOTE – General

QUESTION - How is Salesforce currently being used (describe use cases)

**RESPONSE:** For customer relationship management across THECB.

108. REFERENCE – N/A

QUOTE – General

QUESTION - What is the current number of Salesforce instances?

**RESPONSE:** Enough to cover project needs.

109. REFERENCE – N/A

QUOTE – General

QUESTION - What is the current approach for customer support via live telephone for AppyTexas?

**RESPONSE:** Existing vendor manages live telephone support, which should be offered as a separately priced option as per section 3.1.9.

110. REFERENCE – Attachment A

**QUESTION** - What are the tools that are currently being used by THECB to manage project documentation and to ensuring documentation of development for later use and updating?

**RESPONSE:** THECB uses Azure DevOps for workflow management and version management.

111. Can you provide respondents with a comprehensive list of use cases that include must-haves and should-haves? If so, when should respondents expect to receive them?

**RESPONSE:** See section 3 of the RFO for a list of requirements.

112. What are the processes for sourcing and approving all functional, technical, and design requirements for the project?

**RESPONSE:** THECB is interested in a collaborative Agile relationship with selected vendor that involves iterative development and progress. More generally, see section 3.3 of the RFO.

113. What are the processes for defining and accepting delivery of services and go-to-market activities?

**RESPONSE:** See question 112.

114. Are there specific requirements for the sequencing, labeling, and inclusion of questions in the application form?

**RESPONSE:** Questions will be decided by THECB, with input from selected vendor and the ApplyTexas Advisory Committee.

115. What are the key district SIS systems with which the project must integrate? If so, do any of these SIS integrations currently exist?

**RESPONSE:** THECB has no current SIS integrations—other members of the Tri-Agency community may have developed integrations. Specific integration targets will be decided between THECB and selected vendor based on trading off value to the project and time required.

116. What SIS data elements are currently exchanged with ApplyTexas? If so, how is that data exchanged?

**RESPONSE:** None are directly shared today.

117. Can you elaborate on the difference in requirements for sharing data with application management tools (3.2.2.3) vs CRMs and SISs (3.2.2.2)? What data needs to be delivered to each of the systems and for what purposes will such data be used?

**RESPONSE:** Data integration with IHE systems (application management tools, CRMs, SISs) will make the process of reviewing applications more efficient for IHE staff. The specific data points and integrations will be decided among THECB, selected vendor, and the ApplyTexas Advisory Committee. Data integration with K12 systems (such as SISs mentioned in section 3.2.1.8) support more streamlined data gathering of student information to save students time.

118. What student data elements does ApplyTexas share with IHE and what actions trigger that sharing of data?

**RESPONSE:** Student information necessary for reviewing applications is shared with IHEs upon the student applying.

119. Are there any existing integrations with IHE that must be supported?

**RESPONSE:** Yes, see section 3.2.2 of the RFO.

120. Are there any branding requirements or preferences for the application and the user experience?

**RESPONSE:** Quoting section 3.2.1 of the RFO: Awarded Respondent will develop or update a human-centered design that makes applying to programs easy and intuitive, while allowing students to discover high-quality programs where they are likely to succeed.

121. Does THECB have any requirements or preferences for the continued use of the ApplyTexas brand?

**RESPONSE:** Use of the name is required; the specific design and brand can be changed.

122. General Questions - Formatting Requirements

Are there any formatting requirements for the required documents (font, font size, page limitations, margins).

**RESPONSE:** See section 10 of the RFO.

123. Pg 3 Section 2.2.1

- *Organization chart;*



Is the request for an Organizational Chart of the organization or of the project?

**RESPONSE:** Both.

124. Pg 3 Section 2.2.1

- *Management team resumes;*

Is the request for the resumes of the team intended to manage the project? Or for the management team of the full organization?

**RESPONSE:** Both.

125. Pg 3 Section 2.2.1 and 2.2.2

2.2.1

- Key personnel resumes, illustrating the qualifications of each individual to perform the services described in this RFO;

2.2.2 *Key Staff and Qualifications of Key Staff*

Proposed key staff must have the appropriate background skills, knowledge, experience, and training. Evidence of qualifications must be included in the Company Profile.

Is there an intended difference between “staff” and “personnel”? Both are called out for resumes and qualifications descriptions -if they are not synonymous, please define the RFO’s meaning of each category.

**RESPONSE:** No distinction.

126. Pg 4 Section 3.1.4

*“Ensure payment processing goes through Texas.gov, which achieves Payment Card Industry Data Security Standard (PCI DSS) compliance.”*

Will THECB accept a PCI compliant solution for payment processing other than texas.gov?

**RESPONSE:** No.

127. Pg 5 Section 3.2.1.8

*“Build an integration with key district Student Information Systems to allow importing of existing records such as grade point average (GPA) and course history.”*

Is THECB willing to consider a common solution for SIS integration, or is it only interested in customized solutions for each K-12 district?

**RESPONSE:** Common integration directly with SISs is preferred, and likely the only reasonable alternative given the number of districts in Texas.

128. Pg 6 Section 3.2.1.11

*“Integrate with THECB’s customer relationship management (CRM), Salesforce, to allow for real time reporting.”*

What reports are supported with this integration?

**RESPONSE:** Reports as defined and agreed to by THECB and selected vendor.

129. Pg 7 Section 3.2.2.6.

*“Maintain a network of Helpdesks designed to respond to the needs of applicants, institutions, and high school counselors.”*

Will THECB consider a centralized Helpdesk function or will it require a Helpdesk dedicated to THECB? To each Texas institution?

**RESPONSE:** Centralized is fine.

130. Pg 7 Section 3.2.2.5

*“Continue to accept annual updates to IHE-specific application settings in a similar format and schedule as the current system.”*

What is the current format and schedule?

**RESPONSE:** IHEs submit application changes annually, due by May.

131. Pg 7-8 Section 3.2.3.1

*“Provide functionality equivalent to the current Counselor Suite, allowing counselors to:*

- *View a list of students at their school who have started or completed a FAFSA and Texas Application for Financial Aid (TASFA); and*
- *Create reports on student admission applications and FAFSA and TASFA filing status.”*

Where does FAFSA and TASFA data originate? How is that data kept current? Is there an integration with FAFSA and or TASFA?

**RESPONSE:** FAFSA data is provided to THECB through an agreement with the Department of Education. THECB receives FAFSA data daily. Previous year’s data remains on the Counselor Suite site until the first report of the new year is available, typically around mid-late October. Online TASFA is in development and TASFA data will be maintained by THECB. Integration will be within the Azure cloud.

132. Pg 10 Section 5.4 Item 7 and Attachment B

Is a Texas Tax ID required in order to submit a proposal? Is it recommended? Can a respondent initiate the process of acquiring a Texas Tax ID upon award?

Is an applicant required to be on the Texas vendor list (CMBL)? Is it recommended? Can a respondent initiate the process of being added to the CMBL upon award?

**RESPONSE:** A Texas Tax ID is not required to submit a proposal. A Texas Tax ID number will be required from the awarded respondent prior to contract execution. Respondents are not required to be on the CMBL.

133. Pg 16 and Attachment E - *Conflict of Interest*

Please can THECB provide some scope on its definition of a “conflict of interest”

**RESPONSE:** See Attachment E for more details.

134. Attachment B Pg 2 Item 2 Texas Family Code

*“Pursuant to Texas Family Code § 231.006(c), Respondents are required to include the name and social security number of each person with at least a 25 percent ownership interest of the business entity submitting the Proposal.”*

Since nonprofit organizations have no owners, please provide instructions on how THECB would like that type of entity to respond to this required question.

**RESPONSE:** Nonprofit organizations are not required to complete this information.

135. Would THECB be open to an initial proposal for discovery, design, iterative prototyping/POCs and mobilization (Phase I), and then following that engagement, a well-informed development and delivery proposal (Phase II)?

**RESPONSE:** THECB is open to all proposals that meet the delivery timing requirements of the RFO.

136. Per 3.1.9 – Will THECB accept proposals that do not provide pricing for customer support? (“THECB may opt to contract for this service separately. Respondent should provide pricing specific to customer support.”)

**RESPONSE:** No.

137. Per 3.1 – What is the size of the data required to migrate from the existing system to a new system? (“If proposing a new ApplyTexas system, Respondent should submit a detailed plan for managing the migration of current data user experiences into the new system with its proposal.”)

**RESPONSE:** See question 5.

138. Per 3.1 – Will THECB accept proposals that do not provide hosting services for the ApplyTexas solution? (“and possibly host and maintain ApplyTexas.”)

**RESPONSE:** The solution must meet the requirements of the RFO, which give an option for a vendor-hosted or THECB-hosted solution. A successful proposal must do one or the other.

139. Per 3.1 – Will THECB accept proposals that do not provide maintenance for the ApplyTexas solution? (“and possibly host and maintain ApplyTexas.”)

**RESPONSE:** See question 138.

140. Per 3.1.9 - We would not be positioned to provide “...customer support via live telephone conversations and other means, including email with a one (1) business day response time and an online knowledge base.” Would this be a disqualifier or impact the scoring of our response?

**RESPONSE:** Subcontracting this service is an option to all vendors

141. Per 3.1 - “If proposing a new ApplyTexas system, Respondent should submit a detailed plan for managing the migration of current data user experiences into the new system with its proposal. The plan should demonstrate an understanding and commitment to creating equitable advising experiences for student populations who have traditionally been underserved.” What material is available to help us understand the scope, nature, and complexity of this legacy migration?

**RESPONSE:** See question 5.

142. Per 3.1.1 - “Work with THECB to follow a process for engineering that involves regular updates and feedback from a small number of THECB staff. “Please indicate what THECB staff resources will be attached to this engagement and what their planned involvement will be?

**RESPONSE:** A Product Manager will be regularly involved to help prioritize development and represent the voice of the user and THECB; a Project Manager; a liaison to the THECB IT team will help coordinate development and alignment to existing infrastructure; and two-three (2-3) senior leaders will provide feedback.

143. Per 3.2 - “Awarded Respondent will create an improved user experience for the ApplyTexas system for three user groups: applicants, institutions of higher education (IHEs), and K-12 partners.” What work if any has been done to benchmark or interview existing users / user groups to understand gaps and or areas for improvement in the existing user experience(s)?

**RESPONSE:** Extensive user research has been done with an outside UX research vendor. The key findings as well as data will be provided to selected vendor.

144. Per 3.2.13, 3.2.1.16, 3.2.3.3 there are three separate launches for each of the user groups. Would an approach of an initial public launch with minimal viable product (MVP) and then subsequent feature launches be accepted?

**RESPONSE:** Yes, as long as it meets the requirements of the RFO.

145. Per 3.2.1 “Respondent will develop or update” existing integration, and functional components exist in the current ApplyTexas system, can a system technology, architecture and integration diagram and documentation be provided for review during the response period?

**RESPONSE:** This will be provided to selected vendor.

146. Per 3.2.1.5 “Propose additional data elements, if any, that would add value to IHEs and support more equitable outcomes for students.” What existing data elements are available and are there any studies or research that identify data or process gaps to meet the desired outcome?

**RESPONSE:** There is significant academic research on driving more equitable outcomes. Additionally, the user research referenced in question 143 will be available. Existing data elements are the questions in the current application.

147. Per 3.2.1.6 “Propose a consolidation of data elements and questions, if possible, that speed student completion while maintaining IHEs’ ability to complete their work and meet their mission.” What existing data elements are available and are there any studies or research that identify data or process gaps to meet the desired outcome?

**RESPONSE:** See question 146.

148. Per 3.2.1.8, 3.2.1.11, 3.2.2.2, 3.2.2.3. There are multiple system integration points referenced in the RFO. What are the current and planned list of integrations, their system types and data flow? Has THECB already adopted and implemented any elements of the Ed-Fi Alliance’s body of standards and technologies?

**RESPONSE:** The integrations are the ones listed in the RFO. THECB is very interested in Ed-Fi standards and would appreciate any recommendations or proposals that bring THECB into greater alignment.

149. Per 3.2.2.6 – Is the vendor expected to provide help desks to each K-12 school district? Or to provide tools available to K-12 helpdesks? Would THECB contract for these help desks separately? (“3.2.2.6 Maintain a network of Helpdesks designed to respond to the needs of applicants, institutions, and high school counselors.)

**RESPONSE:** User support does not need to be specific to any district. THECB may contract for this separately, but is interested in proposals from vendors as part of this RFO for how they would manage this process.

150. Per 3.2.2.10 – How many institutions are served through the ApplyTexas System? (“3.2.2.10 Provide set-up and training for all participating institutions served through the ApplyTexas system.”)

**RESPONSE:** See question 87.

151. Per 3.2.3.3 – Does THECB expect a proposal for training and adoption support for K-12 partners? (“3.2.3.3 Complete development on components of Counselor Suite by March 3, 2023, to the extent reasonably feasible, to give time for training and adoption”)

**RESPONSE:** That would be a helpful component to the proposal.

152. Per 5.1 – Will THECB accept a proposal for services only, and contract for required licenses separately? (“Respondent’s pricing should include both upfront development costs as well as any applicable estimated one-time or ongoing licensing or maintenance fees or costs. If the solution will result in an added internal cost for THECB, Respondent’s pricing should note that as well.”)

**RESPONSE:** Yes, though the proposal should include the cost of those required licenses.

153. Per 5.1 – Will THECB provide information on the licenses currently held within the organization so that vendors can provide any additional internal costs? (“Respondent’s pricing should include both upfront development costs as well as any applicable estimated one-time or ongoing licensing or maintenance fees or costs. If the solution will result in an added internal cost for THECB, Respondent’s pricing should note that as well.”)

**RESPONSE:** There are no existing licenses which must be carried over into the new solution.

## **Business**

154. It is mentioned “The goal of the project is to offer a centralized means for both Texas resident students and non-Texas resident students to apply to the many outstanding postsecondary institutions available in Texas.”, we would like to understand the root-cause based on which THECB would like to modernize their legacy application. Please provide list of challenges and difficulties being faced

both at the admin side and as well as the public facing web application side that is leading to this application modernization initiative.

**RESPONSE:** See the RFO for more details.

155. Consider the functional or business requirement of current AS-IS state of the application is not shared as part of this RFO and its difficult to understand the depth of the project in the absence of functional details. Therefore, we would like to request for the following for our better understand on the application scope and flow, level of data exchange required at each integration point, etc. Please share the requested details.

- a. Demo of existing application
- b. Share System diagram for AS-IS state.
- c. Share existing application technology stats.
- d. Database Size and file storage size
- e. Rate of new records and total size of the record created monthly
- f. Share the complexity with the current data, that vendor need to be sure to consider during the migration/ETL process.

**RESPONSE:** Information on all of these will be available to selected vendor for their use. Note that the RFO seeks a new solution.

156. Referring to Attachment B, section 4, as this opportunity is for providing IT Solution and Services, please suggest which preference is applicable here for a vendor to select.

**RESPONSE:** Respondents are not required to claim a preference. If a Respondent believes a preference is applicable, Respondent should mark the applicable preference in its response.

157. Referring to Attachment C, we would like to understand the minimum HUB subcontractor goal is applicable for this opportunity, where the subcontractor will be responsible to deliver part of work as per the defined minimum HUB subcontractor goal. Please suggest.

**RESPONSE:** For this solicitation, there is no set HUB goal.

158. Referring to section 2.1, to qualify as per the qualification criteria, the vendor should have 10 years of experience in modernizing legacy application and providing support to maintain such modernized applications or should have experience developing Azure Cloud based solutions using Cloud native services. The

application can be of any business use case or for any specific domain Is this correct understanding?

**RESPONSE:** Yes.

159. Referring to page #20, section “Response to Scope of Work under Section 3. and all subsections of Section 3.”, there are around 40 to 50 items as sub section points and sub-points. THECB’s expectation here’s is that the vendor to provide Narrative for each point listed or to summarize the narrative around the overall solution specific to the Parent Point 3.1, 3.2.1, 3.2.2, 3.2.3 Please confirm.

**RESPONSE:** Summarize the narrative around the overall solution.

160. We would like to confirm that the following paragraph is only applicable to the key staff that vendor will be proposing not to the Vendor who have experience working with THECB on different engagements. Please confirm.

*THECB may not enter a contract with a person it has employed within the past twelve (12) months. Persons who have been employed by THECB or by another state agency in Texas more than twelve (12) months but fewer than twenty-four (24) months ago shall disclose in the proposal the nature of previous employment with the state agency and the date the employment ended.*

**RESPONSE:** This does not apply to individuals or vendors that THECB has contracted with as independent contractors. It only applies to individuals THECB has employed directly.

161. Referring section 11, page #23, we would like to understand if the evaluation criteria for the Cost Component does not include Cloud infra cost as this will be THECB hosted environment and the selected vendor will just provide the ongoing support to the deployed application.

**RESPONSE:** Proposal should include costs, including for THECB hosted solutions.

162. We assume, THECB has their Cloud infra-Admin to manage the Cloud infra for the proposed to be deployed application. The vendor is not responsible to provide infra-admin as an on-going support. Please confirm.

**RESPONSE:** Correct, for a THECB hosted solution.

163. Please clarify is THECB is inclined towards a Custom Build Cloud Native solution or looking for a product/COT’S solution configured and customized as per THECB’s



need? Please share thoughts as there's huge difference between developing it from scratch compared to configuring and customizing.

**RESPONSE:** THECB is open to any proposal that meets the requirements of the RFO.

164. As we understand THECB is looking for a phase wise roll out, Applicants: Jul 2023, IHE & K-12 Partners: Mar 2023, overall contract end date: Sep 2023. Therefore, we would like to understand for the ongoing maintenance support, THECB is looking for a monthly cost or quarterly cost. Please suggest.

**RESPONSE:** THECB is open to either option as a proposal.

165. Considering the current application was developed and is managed by THECB inhouse team. Therefore, we would like to understand, what level of support will be provided by THECB inhouse team during the development process. What to expect, please share more details.

**RESPONSE:** The current application was developed and maintained through a contract between THECB and The University of Texas at Austin. UT Austin ApplyTexas staff will be available to support in the transition.

166. Considering based on the Q&A responses a lot of assessment and analysis will be done as we do not have the BRD or FRD for the existing application, a good of time would be required for the vendor to frame their response. Therefore, we would like to request 2 weeks of proposal submission extension. Please consider.

**RESPONSE:** THECB will not be able to extend the deadline.

## Technical

167. Is the Current implementation architecture/technical documentation along with UI screenshots available? Can you please share this with us.

**RESPONSE:** Yes, and this will be available to the selected vendor.

168. What is the current implementation technology stack of the multiple applications that make up the ApplyTexas app ecosystem (admissions, scholarships, counsellor suite)?

- a. Can you please elaborate the backend and frontend technology stacks and versions of these,

**RESPONSE:** See question 167.

169. Where is the ApplyTexas site hosted? On-prem, AWS cloud, Azure cloud?

**RESPONSE:** AWS, but please note the requirements in the RFO around Azure cloud.

170. Is a single database used for all the ApplyTexas applications?

**RESPONSE:** Yes.

171. What is/are the database(s)?

- a. How many tables are there and how many stored procedures?
- b. What is the Data size if migration required.

**RESPONSE:** See question 1 for available public information.

172. What is the current reporting system?

- a. Are any 3<sup>rd</sup> party tools used?

**RESPONSE:** There is no current reporting system.

173. Do you use any SSO system needs to be implemented for user login and personas?

- a. If so, what kind.
- b. Is this a custom implementation?

**RESPONSE:** Azure AD.

174. How does the current system manage three user groups. How is Authorization Implemented?

- a. applicants, institutions of higher education (IHEs), and K-12 partners.
- b. If possible, please provide test credentials for each kind of user, otherwise share Screenshots for different user groups.

**RESPONSE:** a) AWS Cognito. Additionally, K-12 counselors are authorized by designated Education Service Center representatives. b) Will be provided to selected vendor.

175. *The RFO says, “Ensure payment processing goes through Texas.gov, which achieves Payment Card Industry Data Security Standard (PCI DSS) compliance.”*

- a. Which is current Payment system /3<sup>rd</sup> party used?

**RESPONSE:** Texas.gov.

176. *The RFO says “Integrate Identity and Access Management with THECB’s Azure AD/Azure AD B2C architecture”*

- a. Is Azure AD currently being used? If not, which authentication mechanism is used for the current system?

**RESPONSE:** Yes.

177. Which are the supported Browsers/versions?

**RESPONSE:** There is not an existing requirement. Specific support is to be worked out between selected vendor and THECB.

178. Are the current applications responsive?

**RESPONSE:** Yes.

179. Does the enhanced application need a responsive UI for mobile devices browsers?

**RESPONSE:** Yes.

180. Do we need to create a notification mechanism for the sending e-mails?

**RESPONSE:** It is unclear what this question is asking—there are emails which must be sent as part of the process.

181. As per our understanding all the page data are static. Please confirm.

**RESPONSE:** THECB is open to proposals on client- versus server-side design and data display.

182. Do we need to provide the internationalization/localization Support in the application?

- a. If yes, can you explain in what modules/scenarios.

**RESPONSE:** No.

183. Do the applications support usability & Accessibility (ADA compliance)?

- a. Please share restraints, mandates, or brand /usability / accessibility / screen resolution guidelines to be followed for the new site?

**RESPONSE:** Under Texas Government Code, Chapter 2054, Subchapter M, and the Texas Department of Information Resources’ (DIR) implementing rules, THECB must procure Electronic and Information Resources (EIR) that comply with the Accessibility Standards defined in Title 1, Texas Administrative Code §§ 206.50-.056 and 213.10-.22 and in the Worldwide Web Consortium and WCAG

2.0 AA technical standard as applicable, and when such products or services are available in the commercial marketplace or when such products are developed in response to procurement solicitations.

184. *The RFO says “Propose a technical solution for the ApplyTexas system that includes a service orientated architecture with THECB-approved security controls in place. The proposed technical solution will be subject to THECB acceptance.”*
- a. Is the Current implementation SOAP based or REST API based?
  - b. How many different services available?

**RESPONSE:** See question 167.

185. What are some of third-party systems, that the applications integrate with?

**RESPONSE:** Student data is posted to the National Student Clearinghouse’s SPEEDE Server.

186. How do the applications integrate with third part systems (if any). Is it file based integration, API based integration, etc? Pleas elaborate.

**RESPONSE:** Applications are currently loaded as files onto a server for download by IHEs.

187. *The RFO says “Use and provide THECB with access to workflow management tools (THECB uses Azure DevOps Services) and other means of ensuring documentation of development for later use and updating. Any additional fees for these tools should be included in Respondent’s proposed pricing.”*
- a. What are the existing Azure DevOps services THECB is using?
  - b. Apply Texas is currently hosted on Private/Public/Hybrid cloud? Please elaborate which components are hosted and where?

**RESPONSE:** a) This question is unclear—THECB uses Azure DevOps. b) ApplyTexas is currently hosted in AWS, but note RFO requirements about Azure cloud.

188. *The RFO says “Implement controls to reduce false negatives in student data through auto-completion based on other data sources.”*
- a. Can you please example of other data source?

**RESPONSE:** Other Tri-Agency datastores such as TEA or outside data sources such as Student Information Systems.

189. *The RFO says “Build an integration with key district Student Information Systems to allow importing of existing records such as grade point average (GPA) and course*

*history. allow importing of existing records such as grade point average (GPA) and course history.”*

- a. Import from which data source? Is it from any website/web API, PDF doc, Excel sheet or any API interface is available to get the required information?
- b. How many such endpoints are there?

**RESPONSE:** a) Import from key district Student Information Systems. b) Varies based on SIS.

190. *The RFO says “Integrate with THECB’s customer relationship management (CRM), Salesforce, to allow for real time reporting.”*

- a. Is the CRM integrated with the current system? If yes, how is the data pushed and fetched?
- b. What exact data is integrated with CRM? Please elaborate.
- c. Do we need to push the collected data to Salesforce along with the system’s own database through the salesforce API?
- d. This CRM will be used for reporting only or for analysis as well? If analysis is required, what would be recommended reporting/analytics software (tableau or Power BI or some other software)?
- e. How many reports exist (if any)
- f. How many new reports need to be generated. Please categorize them as simple, medium, complex - complexity.

**RESPONSE:** a) Not currently. b) N/A. c) Need to push relevant user data. d) Open to proposals on how to do analysis and which tools to use. e) N/A. f) To be determined between selected vendor and THECB.

191. *The RFO says “Create asynchronous support articles to support student usage.”-*

- a. We are assuming Documentation needs to be created?
- b. Is the documentation in the form of word doc, or wikis/blogposts?
- c. How much documentation is required? Is this article count quantifiable?

**RESPONSE:** a) Yes. b) Open to proposals—should be accessible by students (i.e., not Word doc). c) Enough to support student usage.

192. *The RFO says “Include a prominent link to comparative employment data, including institution data (costs of tuition, graduation rate, other), in compliance with Texas Education Code § 7.040.- “*

- a. Should we Just need to provide hyperlink to an external website and redirect? Please elaborate.

**RESPONSE:** Correct.

193. *The RFO says “Deliver student application data to IHEs using a format that is agreed upon with THECB. Currently data is delivered using the Electronic Data Interchange (EDI) format (via a National Student Clearing House SPEEDE Server), which requires manual conversion by many institutions. THECB is interested in delivery mechanisms that automatically integrate data into common CRMs and Student Information Systems (SISs) via Application Programming Interface (API).-”*
- a. *How many formats are currently available for EDI?*
  - b. *Could you please provide some samples used currently for EDI?*

**RESPONSE:** a) Transmission follows a common format defined by the National Student Clearinghouse. b) Will provide to selected vendor.

194. *The RFO says “Allow for delivery of data directly into application management tools used by IHEs, namely Slate, Workday, and Salesforce.”*
- a. *Do we need to push the data through their API’s, any current implementation? Any idea if they have exposed something like this?*
  - b. *Do we need to expose the API endpoints from our system as well which will be consumed from other parties?*

**RESPONSE:** a) Yes, through their APIs, of which they have existing integrations. b) Potentially, though no current implementation is planned.

195. *The RFO says “Ensure all student data, including data imported from the Texas Education Agency and other state systems, meet the highest standards for security and encryption. “*
- a. *Please outline the no of endpoints from which data will be imported and details about the data formats?*
  - b. *Also please outline no of endpoint these data need to be pushed? Will it be only Salesforce or the system’s own database or both? Any other place.*
  - c. *Data needs to be stored in the encrypted format?*

**RESPONSE:** a) THECB is open to proposals on this. b) THECB is open to proposals on this. c) Yes.

196. *The RFO says - Continue to accept annual updates to IHE-specific application settings in a similar format and schedule as the current system. -What are the IHE-specific application settings and format?*
- a. *Please also elaborate about the current system schedule?*

**RESPONSE:** IHEs provide feedback and updates annually to their applications.

197. *The RFO says - Maintain a network of Helpdesks designed to respond to the needs of applicants, institutions, and high school counselors. -*

- a. Will it be simple e-mail communication only or do you want a structured tool for helpdesk? Please elaborate.
- b. How many users will be using the helpdesk to process tickets.

**RESPONSE:** a) See RFO for more information, including live support. b) See question 18.

198. *The RFO says - Develop, maintain, and publish a series of regular reports designed to reflect data including, but not limited to, the numbers of applicants, applications completed, and the distribution of activities by high school, district, region, and institution.*

- a. Please provide some sample reports.
- b. Will ApplyTexas systems own reports, if yes how it is different from Salesforce report?
- c. Please provide the approximate report count and their complexity level.

**RESPONSE:** a) Will be developed between THECB and selected vendor. b) Reporting through Salesforce is an acceptable solution as long as all data are available. c) Will be developed between THECB and selected vendor.

199. *The RFO says - Provide reporting capabilities that allow IHEs to monitor the student application process and perform data analytics on application patterns. Reporting should at least cover the existing system's tools, but THECB is interested in adding additional value to IHEs here.*

- a. Is Analytics through Tableau or Power BI or some other tool? Is there any preferred tool?
- b. What existing system tools need to be covered by reporting? Please elaborate.

**RESPONSE:** a) No preferred tool. b) See RFO for scope of reporting.

200. *The RFO says - Provide a downloadable and fillable Portable Document Format (PDF) copy of ApplyTexas applications.*

- a. Will the downloadable form be exact replica of page print or some modification/customization required?
- b. Will these fillable forms need to be imported in the system through some document management system?
- c. Are there any existing document management systems in place?
  - i. If so, What all types of documents are stored and need to be stored in future?
  - ii. If yes, how many documents are currently stored there?
- d. After importing the form, will these data be entered by some manual process?

**RESPONSE:** a) Needs to allow students to complete the application on paper. b) Yes. c) Paper forms need to be processed into the system. d) THECB is open to proposals on how best to get the data from paper into the database.

201. Is Current “Counsellor suite” tools a separate application or part of the web Application?
- a. What is its Current Application architecture diagram,
  - b. Can you share any screenshots and technical documentation, etc to understand the current system.

**RESPONSE:** a) See question 81; b) Will be provided to selected vendor.

202. Counsellor suite reports and data management:
- c. Please outline the number of reports required for counsellors?
  - d. How many reports are available with current implementation?
  - e. Are new reports required? If yes, how many?
  - f. Will it be a part of CRM/Salesforce or systems own database?
  - g. Do you have any reporting tool/infrastructure recommendations?

**RESPONSE:** c) To be determined between THECB and selected vendor, with feedback from users. d) See [https://www.youtube.com/watch?v=x55y\\_ggu21A](https://www.youtube.com/watch?v=x55y_ggu21A). e) To be determined between THECB and selected vendor, with feedback from users. f) THECB encourages using Salesforce where possible. g) THECB is open to proposals.

203. The RFO says “Propose a technical solution for the ApplyTexas system that includes a service orientated architecture “
- a. Is the current system not service oriented? How is it built now and what are the challenges?
  - b. Is the Current system altogether one application - or it is a group of application and tools used to communicate with each other with some manual intervention?
  - c. Is the application ecosystem integration completely API based?

**RESPONSE:** a) Will be provided to selected vendor. b) Current system is a single application. c) No.

204. Are all the ApplyTexas app ecosystem applications (admissions, scholarships, counsellor suite) custom developed or some of them are COTS? Please elaborate.

**RESPONSE:** All are currently custom developed.



205. Will the existing vendor give the new vendor any Knowledge Transfer to take over and maintain the systems?

**RESPONSE:** Yes.

206. Are Unit Test cases (unit test code) already developed for the applications?

**RESPONSE:** There are test cases developed – THECB assumes more will be needed.

207. How does the build and deploy process work for the current applications?

**RESPONSE:** There are development and staging servers used to validate work underway before pushing live.

208. How many users currently use the systems?

**RESPONSE:** See question 5.

209. Are there any peak times that these systems get used?

**RESPONSE:** Usage increases leading up to admission deadlines.

210. What is the network traffic/bandwidth usage across the ApplyTexas app ecosystem applications (admissions, scholarships, counsellor suite)?

**RESPONSE:** See question 5.

211. If we are to propose a completely new system – can you, please share the existing comprehensive list of features and functionality that are in place across the applications?

**RESPONSE:** See RFO for requirements

212. What is the budget for this project?

**RESPONSE:** See question 1.