

Texas Higher Education Coordinating Board

Request for Proposal (RFP)

Human-centered Research and Experience Design for College & Career Advising in Texas

781-1-25209

Questions and Answers #2

August 18, 2021

Question 24:

Will we have the ability to ask additional questions prior to distributing our proposal? (New questions always come up, particularly when trying to optimize our approach)

The deadline for questions was August 13, 2021. If there are questions that need clarifying, the THECB may choose to revise a Questions and Answers doc on the ESBD and THECB website.

Question 25:

When will we have access to your prior research?

THECB will share research findings from our current evaluators as it becomes available. As soon as we finalize the agreement with the contractor, we will share all research that has been conducted.

Question 26:

What is the team's familiarity with human centered design thinking frameworks and processes? (ex: double diamonds, card-sorting, five whys, formative evaluation)

Texas OnCourse has leveraged HCD in developing and delivering products, with the product management team often leading the efforts. Additionally, the THECB team has participated in HCD workshops, so most of the team has an understanding of the value.

Question 27:

How have socialization processes worked in the past? What is the typical review process, in terms of audiences/gates and timing? What is the process for approval and how does that relate to socialization?

- Our process is based on regular socialization with a client's working team, to provide regular transparency and avoid "big reveals." In the context of socialization, does your team have a "pre-read" culture or expectation, where presentations are distributed early for review before meeting? For clarity, extensive pre-read requirements can be supported, but will

influence the engagement schedule. (i.e. additional time added to support pre-reads)

Depending on the milestone, the socialization process will vary. We anticipate working very closely with the contractor team with regular checkpoints established during contract negotiation. In sum, we do not anticipate extensive delays that would influence the engagement schedule due to gates within the agency. We may build in additional review time for significant contract milestones where executive sign-off is required.

Question 28:

Besides the tech assessment, are you purely looking for a digital solution?

No, we are looking for a holistic strategy that does not solely rely on technology, but instead incorporates technology as part of the solution.

Question 29:

From the requirements for *Phase 3: Strategy Design & Implementation*, (e.g. 3.03.3 and also your comments to date), our understanding is that the strategy solution should include Service Design aspects in addition to the digital/technical solution. Can you confirm?

Correct, it may include service design, or other methods to ensure all Texas students can access high quality college and career advising and self-service tools to prepare for and attain high value credentials and careers. This particular point 3.03.3 refers to ensuring the proposed strategy will continue to resonate with key stakeholders by systematic engagement through a facilitated network. This is a lesson learned from other initiatives we implemented.

Question 30:

For 3.03.2 are you describing both establishing a change management protocol and process in addition to an experience measurement and analysis strategy (continuous testing and analysis)? Does anything currently exist to service these needs across tri-agency partners? Can you provide your current change management protocols/process and measurement/testing strategies from tri-agency partners as part of alignment during the engagement?

At the core of this is a clear causal pathway for what we believe will happen due to our work. With any theory of change there are assumptions built in that we want to be able to test against as the work progresses. This will allow us to make modifications when new findings challenge our original assumptions. The tri-agency working group does not currently have a clearly defined theory of change, and the aim is for the outputs of this engagement to be relevant across all agencies. Upon contracting, we will provide all relevant protocols and strategies and collaborate with the selected contractor to align on process and measurement.

Question 31:

What kind of program office structure are you establishing to wrangle and align stakeholders across the tri-agencies, business, and key organizations? How will our team integrate with them?

The Governor established the [Tri-Agency Workforce Initiative](#) which formalized the working relationships between Texas Education Agency, Texas Higher Education Coordinating Board, and Texas Workforce Commission. The contractor will be invited to meetings as appropriate to provide updates. Staff from THECB will facilitate the integration of the contractor's work with the aims and functions of the working group.

Question 32:

What types of status or other reporting are required during the engagement by the Board or other groups? Are there additional Federal reporting requirements given the funding source for this engagement?

There are no any additional formal reporting requirements than are specified in the RFP.

Question 33:

Do you have an existing common data schema for passing information between platforms for the tri-agencies, businesses and organizations?

THECB is engaging in a holistic data modernization effort. More information on these efforts is publicly available through updates to the Board. Additionally, the contractor will have direct access to key members of the data modernization team.

Question 34:

Do you have an existing middleware layer that platforms use to interconnect between the same?

THECB is engaging in a holistic data modernization effort. More information on these efforts is publicly available through updates to the Board. Additionally, the contractor will have direct access to key members of the data modernization team.

Question 35:

Do you have platforms across the tri-agencies, business and organizations that currently share data, or operate as an ecosystem?

THECB is engaging in a holistic data modernization effort. More information on these efforts is publicly available through updates to the Board. Additionally, the contractor will have direct access to key members of the data modernization team.

Question 36:

In addition to the insights you are able to provide through sharing your audit documentation, what type of access will we have to explore systems that you have in place? What level of guidance will you be able to provide in terms of walkthroughs of systems and related discussions?

THECB will connect the contractor to necessary parties within and across agencies to ensure they have access to the information they need. THECB staff will provide detailed walkthrough of current projects, products and services.

Question 37:

Given this will be a new product, how/when are you planning to staff a team to support this?

To clarify, this will not definitively be a new product, but instead a new strategy. There will likely be new technical approaches that are part of the strategy, ie new integrations, new UI/UX needed, new entry point and/or portal for accessing existent tools/services.

Question 38:

Will you make hiring decisions based on the technical recommendation/requirements or are you already sourcing these teams?

- If already sourcing, can you tell us the skillsets you are looking for? This will help guide some of the software selection process.

We are not currently sourcing additional staff for this work. Should engineering requirements surface, we will likely work with a contractor to complete the work. We have a small engineering team on staff but they are currently at capacity with existent projects.

Question 39:

For content management, are you partial to open source (Drupal) or looking for more SaaS products (Mura)? Or would you look to us to help identify and recommend new best-in-class products?

We will look to the contractor for content management recommendations aligned with the proposed strategy.

Question 40:

Will you require specialized workflows for content editing, publishing and approvals?

We currently have an established workflow for our content delivery that will be shared with the contractor.

Question 41:

What level of analytic tagging and reporting would be expected? What KPIs will be important to track?

The strategy will aim to improve student outcomes as measured by the extent to which Texas students achieve:

- Equitable access to advising tools;
- Equitable experience and engagement with those tools;
- Completion of critical pathway milestones; and
- Attainment of high-value credentials.

In collaboration with the contractor, we will identify short-, medium- and long-term KPIs within each of the bulleted items above.

Question 42:

What testing levels are expected for: Accessibility, Security, and Legal/Compliance?

While the agency aligns to the WCAG2.0 AA standards, this RFP does not directly involve development, therefore testing levels can be determined at another time.

Question 43:

Would you require recommendations for infrastructure (hosting providers / configurations)? Are you open to managed service provider solutions?

If the infrastructure configuration is critical to the holistic and equitable advising strategy, we would be interested in your recommendations and rationale.

Question 44:

Are you looking for Technical SEO best practices recommendations as part of the final deliverable?

If the contractor feels that SEO best practices are critical to creating a holistic and equitable advising strategy, then we would appreciate those recommendations, along with a rationale.

Question 45:

Are there current manual processes that you have identified that you will automate as part of this new strategy? Will the assessment include recommendations for manual processes that we think could be easily automated to provide greater value or opportunity in other areas?

We would like for the strategy to identify efficiencies that will lead to our aim for more Texas students to attain high value credentials and careers. This may include recommendations for automating manual processes.

Question 46:

How diverse is your technology ecosystem, in terms of the platforms supported? We understand that you have systems in place from at least the 1990's, perhaps older. What operating systems/platforms (and versions) are out there? For example, do you have mainframe systems that we need to pull data from, send data to, otherwise interconnect with?

The present technology ecosystem is diverse with dated systems to more modern solutions. THECB is engaging in a holistic data modernization effort. More information on these efforts is publicly available through updates to the Board. Additionally, the contractor will have direct access to key members of the data modernization team.

Question 47:

My company is interested in submitting a proposal for RFP No. 781-1-25209. I would like to attend the bidder's webinar and would like to be included in any communication regarding the link to access the webinar. Also, my company is HUB certified, who would I contact at THECB if I have any questions related to the completion of the HUB Subcontracting Plan?

Please contact Linda Natal at linda.natal@highered.texas.gov for assistance completing the HUB Subcontracting Plan.

Question 48:

Thank you for sharing your RFP with us, we are thrilled to be considered! While we spend time reviewing the documents, would you be able to share a high level budget for the full scope of work? This will help us determine the best way forward.

Answered under Question No. 5 in the Questions and Answers #1 doc.