

I collaborated on this SOW and highlighted the portion I wrote.
I heavily edited sections 3 and 4; the remaining sections were boilerplate.¶

Appendix C

Texas Higher Education Coordinating Board

Statement of Work (SOW) for Texas Financial Aid Center (TFAC) External Website

Deliverables-Based Information Technology Services (DBITS)
Contract

1 Introduction

The Texas Higher Education Coordinating Board (THECB) is seeking a Vendor to develop a singular, comprehensive financial aid website consolidating approximately 200 webpages currently housed on three separate domains. The website must be mobile-friendly, modern, and easy to navigate while meeting the criteria outlined under Scope. Per [10 TAC, Section 206.70](#), all new or changed webpages must comply with the standards referenced in US Section 508 Appendix C Chapter 7 §702.10 (WCAG 2.0 Level AA excluding Guideline 1.2 Time Based Media). The ideal website design must be nimble so that the site has the ability to evolve and avoid obsolescence.

THECB staff will provide content, which will drive the site architecture established by the Vendor. The website design will be such that THECB staff has the ability to maintain updates to the site after the Vendor's initial development and construction of the site and webpage templates. This includes the ability for THECB staff to create new webpages, move existing webpages, and delete webpages, among other functions. The Vendor must follow current industry best practices and advise the THECB on carrying these practices forward.

1.1 Target Website Audiences

Primary: The student/millennial audience accesses websites via mobile devices and consumes information in multimedia formats. They crave video and interactive components, a high-quality modern design, and easy-to-use, relevant, and scannable content.

- The public: high school/college students and their parents; veterans; professionals seeking a career change; interested citizens; borrowers

Secondary: The institutional audience also wants relevant, scannable content but is more likely to use downloadable PDF resources and manuals and access the site from a laptop or desktop computer.

- Financial aid administrators at institutions of higher education
- High school counselors/advisors, high school teachers, nonprofits in education

Tertiary:

- Business and community leaders
- Policymakers; researchers; academic professionals
- Healthcare and behavioral health stakeholders
- Legislators and the governor's office
- Government agencies focused on education, the workforce, or populations considering higher education (Texas Education Agency, Texas Workforce Commission, Texas Department of Family Protective Services)

2 Background

As of June 2020, the THECB maintains financial aid resource information on three distinct websites:

- College for All Texans ([CFAT](#))
- Hinson-Hazlewood Loans ([HHLoans](#))
- Student Financial Aid Programs ([SFAP](#)) on higher.ed.texas.gov

These websites have varied audiences and content, yet much of the information across the sites is duplicative, and some content is poorly organized because of limitations in the website platforms. Users unfamiliar with these sites struggle to find relevant information quickly.

Since the three websites were developed to serve different audiences, the sites have an issue of content segregation. A financial aid officer, for example, may need to access sections on all three sites to gain a comprehensive picture of administering Texas financial aid programs. This is cumbersome for the end user, and there is a great risk that any redundant information across the sites may be conflicting. Some other issues with the current sites are the following:

- Poor navigation
- Not optimizable for mobile platforms
- Not optimizable for search engines
- Lack of useful analytics
- Content is severely limited by rigidity of the webpage templates
- Difficulty in keeping the sites fresh because of limited and incompatible platforms

The THECB plans to consolidate overlapping content and establish a singular website that houses all financial aid information currently on the main THECB websites. This integrated website would be a **one-stop shop** for all things related to financial aid for higher education in Texas. Our key audiences—high school students and families, college students, veterans, professionals seeking new skills, institutions—would be able to easily access clear and concise higher education financial aid information in one website location. This new, improved site would meet the website component of the “Center for Financial Aid Information” mandated in [TEC §61.0776\(e\)\(2\)](#).

3 Scope of Work

The scope of work for this website design project involves all planning, design, execution, implementation, and training for a new public-facing internet site called TFAC: Texas Financial Aid Center. The following is a high-level description of the services required and duties/responsibilities between the selected Vendor and the THECB related to the website design and development.

3.1 Description

Create visual design (storyboards/prototypes, site concept, and content layout) and information architecture (site structure/organization, navigation/findability, etc.) for the new TFAC website. The website must work across multiple browsers, operating systems, and devices, such as Windows, iOS, Android, Chrome, Safari, Edge, FireFox, IE, etc. The Vendor is expected to use industry best practices in all aspects of the contract in order to deliver value to the THECB and the target audiences. The **MURA content management system (CMS)** will be used to develop and implement the new website.

3.2 Requirements

- Design TFAC as a responsive website, viewable on varying screen sizes of desktop, tablet, smartphone, or other mobile devices.
- Design versatile custom page templates that allow for multiple interior informational pages to be created with these and other components: text, images, video, FAQ sections, and embedded social media posts. Develop templates for the following and any other areas identified:
 - Varied layouts, such as tables, content blocks, etc.
 - Sidebars
 - Header/footer sections
 - Horizontal global navigation
 - Cloning and accordion capabilities
- Develop a pattern library with all the defined components from the wireframe layouts. Provide the pattern library to the THECB for review.
 - Pattern library components should be compatible with the MURA CMS. THECB content managers should be able to use all pattern library components effectively without knowledge of HTML, CSS, XML, XSL, etc.
- Provide user interface designs in MURA CMS that ensure layout, design, and organization is user-friendly and responsive (mobile-friendly).
 - Includes current software.
 - Leverages the versioning and indexing features in the CMS to meet legal and policy-based records retention.
 - Conforms to state accessibility requirements. Per [10 TAC, Section 206.70](#), all new or changed webpages must comply with the standards referenced in US Section 508 Appendix C Chapter 7 §702.10 (WCAG 2.0 Level AA excluding Guideline 1.2 Time Based Media).
- Ensure that the new design will incorporate a number of in-house and third-party applications, including but not limited to:
 - Native applications—Net Price Calculator, College Map, etc.
 - Social media—Facebook, YouTube, LinkedIn
 - E-newsletters—GovDelivery
 - Live streaming, podcast, video
 - Event registration

- Website Translation
 - Ensure translation feature will work for all website visitors regardless of device or browser version by providing any back-end modifications to allow for website translation.
- All products, designs, drawings, logos, testing and production environments and outputs developed as part of the activities conducted on this contract/order will be considered the property of the THECB and may serve as input on subsequent orders, or other contractual vehicle, as deemed appropriate. Offerors will not submit as proprietary data in their proposal or quotation any restrictions that will limit the THECB ownership and right to use the data generated, products, designs, drawings, and outputs developed under this award.

3.3 Training Knowledge Transfer

Provide knowledge and capability transfer to the THECB in the form of webinars, instructional documentation, and face-to-face meetings to ensure understanding and future reference. Training must ensure that THECB staff (to include web development personnel and content managers) is capable of maintaining and expanding website as needed.

3.4 Review and Testing

Vendor will use the agency-provided CMS test and production environment to design and implement the new website.

Vendor will conduct Quality Assurance and User Acceptance Testing.

- Thorough Design Review
- Cross-browser testing
- Cross-device testing
- User Acceptance Testing (UAT)
 - The THECB will participate in acceptance testing and review results prior to approval; the agency will document any deviations, defects, or omissions from the project scope. Issues to be resolved by Vendor.

4 Deliverables:

Deliverables must be provided to the THECB on the dates specified in the project plan. Any changes to the delivery date must have prior approval (in writing) by the designated THECB Project Lead.

- All deliverables must be submitted in a format agreed upon during the Discovery phase.
 - If a deliverable cannot be provided within the scheduled time frame, the Vendor is required to contact the THECB Project Lead in writing at least 48 hours prior to the deadline with a reason for the delay and the proposed revised schedule. The request for a revised schedule must include the impact on related tasks and the overall project.
 - A Vendor request for a revised schedule must be reviewed and approved by the THECB Project Lead before placed in effect. Contract Terms and Conditions may dictate remedies, costs, and other actions based on the facts related to the request for a revised schedule.

The THECB Project Lead will complete a review of each submitted deliverable within an agreed-upon specified time from the date of receipt of said deliverable. If deliverable is approved by the THECB, the Vendor can move forward to the next phase or task. If deliverable is not approved, the THECB will evaluate the deliverable to determine revisions and communicate to the Vendor any necessary updates.

4.1 Discovery

At the beginning of the Discovery phase, the Vendor and the THECB will establish general expectations, define roles and responsibilities, and determine the method on how deliverables will be communicated for approval.

The Vendor will collaborate with the TFAC Project Team and other THECB staff (i.e., ISS, management, other department stakeholders, etc.) as necessary to understand the vision, mission, and measurable goals for the TFAC website. Work conducted in this phase includes:

- Assess and document internal stakeholder needs and preferences.
- Identify the needs of our audiences.
- Set measurable usability objectives.
- Determine usability test strategy and select usability test methodology.

- 4.1.1 At the conclusion of the Discovery phase, the Vendor will provide the THECB with a comprehensive project plan that will include:
- A description of key activities, milestones, and approval checkpoints.
 - A detailed methodology description of the Vendor's approach to analyze, assess, validate, document, and complete each deliverable.
 - A description of all resources that the THECB needs to provide to Vendor to support the process.
 - Any assumptions and dependencies of the project.

4.2 User Experience and Design

Vendor and the THECB will collaborate to create a content plan to ensure that all content needs are captured and documented.

- 4.2.1 Vendor provides for approval a comprehensive Information Architecture (IA) that will define where all webpages will "live." This will include but is not limited to:
- Content-type architecture
 - Taxonomy architecture
 - Entity definition
- 4.2.2 Vendor will provide for approval wireframes/prototypes, site concept, logo, and content layout to the THECB. This will include but is not limited to:
- Wireframes for all templates, including search results page, 404 pages, and other standard pages
 - Wireframes in smallest form factor (mobile) resolution
 - User story generation
- 4.2.3 Vendor to deliver the contextual view to the THECB.
- 4.2.4 Vendor will work with the THECB information technology staff to make sure the plan is technically feasible.
- 4.2.5 At the end of the User Experience and Design phase, the vendor will update the project plan and add the complete list of deliverables. For each deliverable, the vendor will work with THECB staff to define and document acceptance criteria. Once the updated project plan is approved by the THECB, the project will go into the Development phase.

4.3 Development

- 4.3.1 Vendor to implement the approved User Experience and Design. Vendor will collaborate with the THECB by using original content plan (4.2) to add, integrate, or migrate necessary content to each page.
- 4.3.2 Website development will include but is not limited to:
- Base CMS configuration
 - Functional optimization
 - Responsive theming
- 4.3.3 Optimization—Vendor will ensure that all pages are developed for usability and search engine optimization. As the THECB currently uses Siteimprove and Cludo for site analytics and optimization, the Vendor will use these tools also.

4.4 Testing

The Vendor will perform testing according to THECB policy to ensure the quality, security, and accessibility of the new website.

- 4.4.1 Design Test Resolutions—The Vendor will develop a Test Report (TR) that outlines all reviews and tests performed and respective results. The TR must be presented to the THECB prior to proceeding to the User Acceptance Testing phase. The Vendor will ensure that the new website is production-ready.
- 4.4.2 Final Site Experience—Vendor will support users and stakeholders during UAT until all issues are resolved.
- To include at least two rounds of UAT revisions

4.5 Pre-Launch

- 4.5.1 Vendor will review the new site in-depth with the THECB to ensure that the THECB understands all components of the delivered site.
- 4.5.2 Training Plan—Vendor will provide extensive in-person training and documented instructions/training materials for maintaining the website. The THECB will have full understanding of the site components and be capable of updating and changing content after training is complete.

4.6 Launch

Vendor will deliver to the THECB a fully functional, accessible, maintainable, visually appealing, and interactive site that has easy and logical navigation and is compatible with the current Mura CMS. End product will:

- Be compatible/responsive for:
 - All operating systems (PC/Mac/etc.)
 - Cross-browser compatibility
 - Mobile friendly
- Include HTML and CSS templates with varying layouts. Templates are not limited to the following:
 - Homepage/landing page
 - Content pages
 - Press release page
 - Tables that can be modified
 - Services/Resources page
 - Calendar features
 - Calculator tools
 - Collapsible menu or accordion-style features for lists and resources
 - Ability to pull in images, videos, GIFs

4.7 Post-Launch Support and Training

Vendor and the THECB will enter into a service-level agreement for the duration of the post-launch Support and Training period for up to 180 days. During this time, Vendor will meet with the THECB to discuss and remedy any updates or modifications identified within a specified timeframe after Go Live that were not executed as part of the original agreement.

- 4.7.1 Vendor will provide status reports to ensure that any issues identified have action items and resolution dates prior to the completion of the post-launch period.
- 4.7.2 During the post-launch period, Vendor will provide the THECB any new or continued training to ensure the THECB's long-term success and maintenance of the site going forward.

4.8 Delivery Schedule

The estimated time frame for each deliverable will be negotiated between the THECB and the selected Vendor.

5 Change Request and Process

Change requests should not be used to manage daily operational project management, project monitoring, and control activities, as doing so will add significant overhead to the project management activities. The THECB and the Vendor affirm they are fully committed to completing this project on time and within the established budget. All scope changes must be reviewed by both the THECB and the Vendor as soon as possible.

Changes may be appropriate based upon actual experience or as the THECB better understands or redefines THECB requirements. In addition, changes may be necessary if the THECB or Vendor does not comply with any of its responsibilities or other obligations under this document or in the event of any deviation from any assumption, constraint, dependency, or project scope specification contained in this document.

The following outlines the change request procedure:

- The THECB and the Vendor will discuss the change request and mutually agree on the complexity of the change.
- The THECB and the Vendor will document the change.
- The Vendor will determine the impact to the original schedule and cost, if any.
- The THECB and the Vendor will make an addendum to the project scope documentation, milestone dates, and other required project artifacts.
- The Vendor and the THECB will sign the change notice that contains the information listed in the steps above.
- The THECB will execute the Purchase Order Change Notice to the purchase order.
- The duly authorized THECB representative who may approve change orders will be identified for the Vendor.
- All other terms within the original SOW, in addition to the signed addendum, will remain intact.

6 Vendor Security Requirements

- Ensure that web application development is based on secure coding guidelines, such as the guidelines published by the Open Web Application Security Project (OWASP).
- Ensure proper information security controls are in place, such as TAC 202, Texas Cybersecurity Framework standards, and other applicable laws, including FERPA.
- House Bill (HB) 3834 requires that for any contract with a state agency, if Vendor or a subcontractor, officer, or employee of Vendor will have access to a state computer system or database, then the Vendor will ensure that such officer, employee, or subcontractor has also completed the required cybersecurity training.

7 Reports and Meetings

Vendor is required to attend project meetings on an as-needed basis. The duration and frequency of these status meetings will be determined by the THECB Project Lead. Sufficient notice to attend status meetings will be provided to Vendor by the THECB Project Lead.

7.1.1 The THECB will receive a weekly project update from the Vendor; a follow-up phone call will be scheduled to discuss the status and all pending items. The weekly update will contain these issues or punch-list items, to be reviewed in the following order:

- Urgent—Items marked as urgent will be reviewed by the appropriate responsible party and resolved or updated during the same day or by follow-up call.
- Normal—Requires at most one week for resolution.
- Any issues pending THECB feedback will be assessed during the update phone call.
- Items with no due date will be noted for review and assignment at a later time.
- Change requests.

Additionally, the THECB will require a weekly standing meeting either in-person or via conference call. The Vendor will provide:

- Formal agenda
- Task list/open items stating responsible party
- Estimated completion dates of task items

8 Period of Performance

The duration of services performed under this statement of work is upon execution of contract by the THECB and DIR with the Awarded Vendor and extending through August 31, 2021 with option to extend up to 180 days at the THECB's sole discretion. The contract term may not be extended except by purchase order change notice (POCN). Vendor will be paid solely for work performed at the agreed-upon rate. All remaining funds will remain with the THECB if statement of work is canceled prior to completion of all work.

9 Invoices

To the extent the Awarded Vendor is not a Texas state agency, payment for services will be made by the THECB in accordance with the State of Texas Prompt Payment Law, Chapter 2251 of the Texas Government Code. If the Awarded Vendor is a Texas state agency, payment for services will be made by the THECB in accordance with the Interagency Cooperation Act; Chapter 771 of the Texas Government Code.

- The Awarded Vendor will not begin or provide any services until issuance of a Contract by the THECB.
- The THECB does not guarantee a specific compensation to the Vendor throughout the term of the Contract. No minimum compensation to the Vendor is guaranteed.

10 THECB/Vendor-Furnished Equipment and Workspace

The THECB will provide workspace with access to any necessary system components, as needed.

11 Additional THECB Terms and Conditions

- Standard Terms and Conditions per the THECB Purchase Order will apply. The THECB will retain 5% of deliverable funds until completion of project as verified by the THECB Project Lead. Payments are subject to acceptance of deliverables. Vendor will be required to sign all confidentiality agreements as deemed appropriate by the THECB.
- Agency in-scope applications and servers are located within the DIR DCS data Center. The successful Vendor will coordinate access and work with the agency and the DCS Vendor.
- In the event of a conflict between the Purchase Order and the DIR Contract, the DIR Contract term will control.
- The Cooperative Contracts and Data Center Services programs are governed by separate government code, and therefore have unique requirements. Agencies within the DCS program are required to have approved DCS exemptions in addition to any exemptions or Statements of Work (SOW) approvals that may be needed or may have already been approved through the DIR Cooperative Contracts program.
- Every Texas state agency and institution of higher education is required to provide access to electronic and information resources (EIR) for state employees and members of the public with or without disabilities. Agencies purchasing products or services are responsible for complying with Texas EIR Accessibility statute and rules, as defined in TGC 2054 Subchapter M, 1TAC 206, and 1 TAC 213. Additional information regarding EIR Accessibility can be found at: <http://dir.texas.gov/View-Resources/Pages/Content.aspx?id=36>

Definitions

Word	Definition
Acceptance Criteria	Each deliverable created under this Statement of Work will be delivered to the Project Lead with an Acceptance Receipt. This receipt will describe the deliverable and provide the Project Lead with space to indicate whether the deliverable is accepted, rejected, or conditionally accepted. Conditionally Accepted deliverables will contain a list of deficiencies that need to be corrected in order for the deliverable to be accepted by the Project Lead.
Acceptance	The determination, in THECB reasonable discretion as confirmed in writing, that the Deliverable(s) are in Compliance, in accordance with the Scope or other criteria agreed to in writing by the Parties.
Architecture	The design, process, strategies, and specification of the overall structure, logical components, and the logical interrelationships of Equipment and Software, including System Software, a Network, or other reasonably related conception.
Business Day	Each day from Monday through Friday, excluding State holidays, 7 a.m. to 5 p.m. Local Time. State holidays will include all holidays with the status "All agencies closed." State holidays will not include State optional holidays or holidays that require skeleton crews. For SLAs related to outbound mail Services, Business Day means each day from Monday through Friday, excluding US postal holidays, 7 a.m. to 5 p.m. Local Time.
Call	A contact (including by telephone, voicemail, electronic mail, fax, automated tool or web request) to Successful Respondent reporting a problem, requesting assistance or Services, or asking a question pertaining to the Services, as well as automated alerts and other problem and Service notifications communicated to Successful Respondent.
CMS	A software application that manages the creation and modification of digital content. CMSs are typically used for enterprise content management (ECM) and web content management (WCM). A CMS typically has two major components: a content management application (CMA)--the front-end user interface that allows a user, even with limited expertise, to add, modify, and remove content from a website without the intervention of a webmaster; and a content delivery application (CDA) that compiles the content and updates the website.
Complying	With respect to Deliverables, fulfilling the requirements of the specifications, the Acceptance Criteria, the Agreement, and all other applicable operational and/or functional requirements.
Content-type Architecture	A content type is a reusable container for managing content by common structure and purpose.
Deliverable	In accordance with Section Deliverables, a vendor-provided tangible item or outcome that the THECB reviews and approves at a specified date/frequency during the term of the contract, excluding reports that are managed/monitored through other defined processes. Deliverables may have certain attributes that impact the review and acceptance. The term includes recurring and one-time deliverables.
Development (Test) Environment	The Systems environment in which software and databases are initially designed and created.
FERPA	Family Educational Rights and Privacy Act.

Word	Definition
Information Architecture (IA)	Structural design of shared information environments; the art and science of organizing and labeling websites, intranets, online communities, and software to support usability and findability; and an emerging community of practice focused on bringing principles of design, architecture, and information science to the digital landscape. Typically, it involves a model or concept of information that is used and applied to activities that require explicit details of complex information systems. These activities include library systems and database development.
Pattern Library	A pattern library is a collection of user interface design elements.
Project Lead	The person or the person's designee identified by the THECB as the responsible individual from the THECB to manage the project.
Project	Discrete units of work approved by the THECB, undertaken to create a unique product or result.
Quality Assurance (QA)	The actions, planned and performed, to provide confidence that all processes, systems, equipment, software, and components that influence the quality of the Services are working as expected individually and collectively.
Resolve or Resolution	The restoration of full Service or the completion of the Service Request in a manner acceptable to the THECB or the applicable Authorized User in their reasonable discretion. Resolution may include the restoration of full Service by workaround or other alternative means.
Server	Any computer that provides shared processing or resources (e.g., application processing, database, mail, proxy, firewalls, backup capabilities, print, and fax services) to Authorized Users or other computers over the Network. A Server includes associated peripherals (e.g., local storage devices, attachments to centralized storage, monitor, keyboard, pointing device, tape drives, and external disk arrays) and is identified by a unique manufacturer's serial number.
SLA	Service-level agreement.
TAC	The Texas Administrative Code, which is the publication for administrative rules.
Taxonomy Architecture	Taxonomy refers to how information is grouped, classified, and labeled within a shared information environment.
TEC	The Texas Education Code. Statutes enacted by the Texas Legislature.
THECB	The Texas Higher Education Coordinating Board, the state agency issuing this solicitation.
UAT	User Acceptance Testing (UAT) is a type of testing performed by the end user or the client to verify/accept the software system before moving the software application to the production environment. UAT is done in the final phase of testing after functional, integration, and system testing is done.
Vendor	The vendor is a person or company offering a product or service for sale that enters into a contract with the THECB.
WCAG	Web Content Accessibility Guidelines.
Wireframe	An image or set of images that displays the functional elements of a website or webpage, typically used for planning a site's structure and functionality.