

Cross Agency Partnership: Full Task Force

Meeting Minutes

# May 23, 2018

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| Present: | Lee Wheeler-Berliner, Trevor Williams, Mark Duey, Stephanie Veck, Andy Tucker, Megan Rymski, Kimberly Caplan, Inta Morris, Julia Pirnack, Brian Pool, Twyla Esquibel, Alfredo Burciaga, Megan McDermott |
| Guests: | Governor’s Fellows: Brooke Borgen, Anne McCord |
| Next meeting | June 12, 2018, 2:30 – 4:00Location: 1600 Broadway, Suite 2200, Training Room, 1-877-820-7831; Participant code - 156473# |

## Introduction

The proposed agenda for the meeting was reviewed:

* Overview of vision and governance principles for first-time attendees
* Updates on Charter status and funding efforts
* Review of RFI process
* Overview of 5 vendors receiving highest scores from RFI evaluations
* RFP and sustainable funding discussion

Two representatives from the Governor’s Fellows program presented. This program is a short intensive that helps private sector employees learn about state government. Nine people from the program chose to work, as their capstone project, on evaluating the RFI responses. Their research and presentation focused almost exclusively on current use of CollegeInColorado.org and other directly competing, private-sector solutions or vendors.

The Fellows gave a good presentation and had two main recommendations which, while focused almost exclusively on the K-12 market, provided task force members with valuable outside input. Several follow up questions focused on the viability of financially supporting ICAP functionality for rural school districts. The task force thanked the Fellows for sharing their thinking and analysis on this important effort.

## Discussion

**Charter, Funding**

A quick recap of the charter signatures (all agencies have signed with DHS still in process) and funding status was given. Inta stated that we believe we have enough funding to keep the CollegeInColorado.org website available to the State through academic year 2018- 2019, so the focus of the funding discussion could shift to the potential product build.

**Review of the RFI process**

Julia gave a brief overview of the rubric used to evaluate and score the vendor responses to the RFI. The rubric, while lengthy, gave reviewers the opportunity to reflect on expectations for major categories of work. Reviewers indicated whether they thought the vendor response did not address each area or was a weak, adequate or strong response. Once received, the five key features from the rubric were weighted for each reviewer scores. CIC staff compiled reviewer comments and identified the 5 proposals that rose to the top. Two vendors received the highest overall score with three receiving the next highest. (Note that one reviewer’s results were added after the task force meeting. The top five vendors resulting did not change, however one of the two top vendors then received the highest overall score.)

**Overview of the top five vendor responses**

Julia distributed a summary page for each of the five top vendor responses that included a bubble diagram of how all vendors placed across three platform elements. All five vendors that scored highest had some combination of all three platform elements as shown below.

**Major Platform Elements with Vendor Placement**

Top two scorers

Next three

The summary sheet for each of the top five vendors included the following:

**Vendor Number x**

 *“Vendor x representative quotes from proposal”*

**Summary**

Proposal summary

**Data Migration**

Data migration from legacy system response

**Funding and costs**

Itemized as presented and including the following:

Custom development

Enhancements, O & M, bug fix

Data transfer from legacy

Annual subscription or licensing fees

Technical support

Creative funding ideas

**Estimated ongoing annual cost for 250K users**

Derived from proposal

**Timing**

Timeline or phasing proposed

**Pros**

3 – 5 proposal strengths

**Cons**

3 – 5 proposal weaknesses

Each of the 5 vendor proposals were discussed by the taskforce, including individual impressions of the proposals and strengths and weaknesses taskforce members noticed as they reviewed the RFI responses. The discussion focused on vendor responses in context of the task force vision of a content-rich portfolio and user journey interface available to users and for Colorado interagency case management. There was general agreement that these five vendors represented the best of the proposals.

Note the discussion and the entire RFI evaluation process was done without reviewer knowledge of the vendor and partner names. As suggested in the RFI, the responses were scrubbed to enable fair evaluation.

After further discussion, 4 vendor responses were selected as the most viable options to meeting most of the goals laid out by the task force in the RFI, with the caveat that one or more of these proposals would benefit from identifying potential partnerships among the four if and when an RFP was released.

The four proposals scoring the highest and affirmed by the taskforce were revealed as submittals from: Couragion/Techtonic, XAP Corporation, Bright Hive/Pairin/Microsoft/LinkedIn/Ligature, NSpark. Although these vendors scored highest in the RFI round, all vendors will be eligible and encouraged to submit proposals if/when an RFP is released and posted.

**RFP and sustainable funding**

## In light of the very promising number and quality of proposals submitted, including the caliber of companies that are interested in the project, the taskforce feels encouraged that next steps are warranted to pursue the collaborative vision. To that end, discussion turned to identifying the next practical steps for releasing a formal RFP. In particular, the task force discussed potential funding scenarios including both development costs and sustainable operations, maintenance, training, outreach and support funding over time.

## There was general agreement that the development costs are the biggest hurdle since budgeting cycles for the agencies do not align with the time periods in which development must occur, making it virtually impossible for agencies to commit further funding to the effort. Discussion concluded that once the project is in development, the legislature could be approached in early 2019 for ongoing funding.

The task force discussed various alternatives for funding the development of the product including approaching other states as collaborators, vendor participation in funding the platform as a demonstration project, sponsorships and grant/foundation possibilities. The ability of vendors to partner with funders in any RFP response will be viewed very favorably.

Finally, the task force agreed that it is quite important to deploy a platform usable for ICAP, even if very basic, by July 1, 2019 so that there is no lapse in service for those using the existing CIC platform. Additional development toward the larger vision could be phased over time.

## Action Items Outstanding

**Inta, Julia and Brian** will look at potential RFP details and project timelines within the next week or two and send options to the taskforce for review. It was also decided that a Webinar would be arranged for vendors interested in submitting against an RFP to learn and ask questions about the project, including identifying potential partners.

**Agencies** committed to identify specific agency website/portal and activities, including basic data sharing information, for inclusion in an RFP if one is released. Additionally, it was suggested that each potential agency partner should consider and begin to identify technical and program contacts for the Q&A conference call that is anticipated to accompany the release of the RFP to all vendors.

**Vision**

Colorado delivers a sustainable, modern and personalized web-based service that securely stores and organizes education, training and career planning information.

We enable students, families, job seekers, professionals and other stakeholders to explore and navigate relevant education, training and career pathway options.

Our team demonstrates multi-agency collaboration using career pathway web-based services and data integration to holistically support stakeholders.