

Business Services

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**Q&A Addendum #1**

**Customer Relationship Management System (CRM) for Study Abroad, Travel Registration, & SEVIS Reporting**

**RFP No. 07292025**

**REMINDER:** It is the Respondent's responsibility to thoroughly read and examine the entire Bid document and any addenda to the Bid.

 **Posted 8/18/2025**

*Vendor Questions*

Please see answers in red.

1. Given the short amount of time between the last date that U of A will issue an addendum (8/22) to answer any final questions (to be submitted by 8/20) and the proposal submission deadline one business day later (8/26), will the U of A please extend the submission deadline by two weeks?

The University of Arkansas will not be extending the deadline.

**SOFTWARE & SYSTEMS IN USE:**

1. What software and systems are currently used by the U of A Graduate School and International Education (GSIE) unit’s STAB and ISS offices to support management, processing, oversight, and compliance of both study abroad participants and international students and visiting scholars?
	1. Study Abroad: Terra Dotta
	2. ISS: Sunapsis
2. Is there an existing appointment scheduling software used by the STAB and ISS office that U of A would like to use and have integrated with the proposed SaaS Platform?
	1. Study Abroad: STAB uses UA Success (Starfish) for student appointments and does not plan to change this.
	2. ISS currently uses Microsoft Bookings and have consistent issues. We could look at using UA Success (Starfish), but would prefer something integrated within our CRM. But we could be flexible on this.
3. The RFP mentions integration with ‘the broader university web environment’. What are the specific web browsers that are included in the ‘university web environment’? Please identify any specific web applications aside from web browsers, and the applications mentioned (Workday, Slate, SEVIS, and Olark Chat) that are included in the ‘broader university web environment’ that the proposed SaaS platform must integrate.
	1. Students, faculty, and staff at the university use a variety of web browsers, so there isn’t one specific web browser that should be targeted.
4. Does U of A have an existing Scholarship management and assignment module/tool that the proposed solution must integrate with? Must the proposed SaaS platform include a native scholarship capability?
	1. Study Abroad: STAB does not use any other university scholarship software and has decided to keep scholarships housed entirely in the SaaS platform. Clarification may be needed on what is meant by “native scholarship capability.”
	2. ISS: The four listed in the RFP are all that are needed from ISS.
5. Can you please confirm the vendor and the vendor's website for the ‘SafeCheck’ mass communication tool mentioned in the RFP?
	1. Study Abroad: This has been amended to state: “Includes an emergency notification and location check-in system that enables administrators to send mass alerts (e.g., SMS/email) to travelers and collect responses to confirm safety and location status during incidents or emergencies.”
6. Does 'SafeCheck' support automation or API-based triggering of emergency messages? If so, what inputs are required (e.g., message body, recipient file, predefined groups?
	1. This has been amended. The request now states: *“Includes an emergency notification and location check-in system that enables administrators to send mass alerts (e.g., SMS/email) to travelers and collect responses to confirm safety and location status during incidents or emergencies.”*
7. With 'SafeCheck', how are emergency SMS recipient lists defined? Are messages sent to all emergency contacts on file or to customers listed at the time of the incident?
	1. Study Abroad: This has been amended to state: “Includes an emergency notification and location check-in system that enables administrators to send mass alerts (e.g., SMS/email) to travelers and collect responses to confirm safety and location status during incidents or emergencies.”
8. Does U of A have a form-building software (e.g., FormAssembly) that can be leveraged to support the conversion of legacy paper forms? If so, what specific form-building software does the U of A have for form building?
	1. The U of A uses Microsoft Forms and Jadu for form-building. We also have Perceptive Content, which can be used to scan legacy paper documents and build workflows. Perceptive Content integrates with Jadu. We can also leverage Sharepoint, Power Platform and the TeamDynamics service management system for workflows and processes.
	2. ISS: All the current ISS forms were created within Sunapsis, the current CRM and would most likely need to be created from within the new CRM.

**PROJECT TIMELINE:**

1. Is there a desired go-live date for the SaaS Platform?
	1. The Study Abroad Office desires the study abroad and international travel registration systems to go live within 70 days of contract signing. Implementation activities cannot take place during the month of February.
	2. The ISS office desires the international student platform to go live within 180 days of contract signing. Implementation activities cannot take place in late July or August.
2. If there is a desired go-live date for the SaaS Platform, what factors are driving the specific go-live date? (Specifically, what is driving the 10-week completion timeline for the STAB program, and the 6-month completion for the ISS support.)
	1. The proposed timeline is necessary to meet the operational needs of the University, the specific requirements of the respective units, and to ensure the platform is in place to effectively support the students we serve.

**FUNCTIONALITY REQUIREMENTS:**

1. Will the SaaS platform the U of A is requesting need to support multiple languages? If more than English is required, please list the other languages the SaaS system needs to support.
	1. Study Abroad: STAB does not require multiple languages.
	2. ISS: We are not considering adapting to other languages at this time.
2. Would the U of A like the proposed SaaS platform to include graphical and interactive maps? Please describe the U of A's preferences in this area.
	1. From Study Abroad: We would like a graphical and interactive map feature to easily see who is in each location, which would also assist risk management users across campus who may be less familiar with the system but still need access to the information.
	2. ISS: Visual data would be beneficial, but not crucial.
3. How does the U of A plan to have non-U of A students submit applications for STAB? Will they go through Slate/Workday first, or will they have a unique application process?
	1. Study Abroad: Currently, non-U of A students can create their own applications for STAB, or STAB can create applications for them. Some non-U of A students go through Slate/Workday, but they need STAB applications before completing the admissions process.
4. How many documents need to be uploaded, and at what frequency per international student and study abroad student?
	1. Study Abroad: STAB has approximately 2,504 applicants per year, and each applicant typically needs to upload at least 10–20 documents.
	2. ISS: At any given time, we would have around 2200 SEVIS records in active or initial status. Each applicant would have an average of 10 documents, with some much more and some fewer. For each student’s life cycle, probably 20 documents are the norm by the end of their SEVIS record.

**BUDGET:**

1. Has a budget for the SaaS Platform described in this RFP been requested? If so, has the requested budget for this SaaS Platform been approved? If so, what is the approved budget for the licensing and implementation of the SaaS Platform?
The university declines to answer questions regarding project budget

**CONTRACTS:**

1. Are there any contract expirations with the current software STAB and ISS are using, of which we should be aware?
The university declines to answer this question

**KEY PERFORMANCE INDICATORS (KPIs):**

1. What are the key performance indicators that will be used to measure the success of this project?
	1. Key performance indicators for this project include:
	 • Ease of use for both administrators and end users
	 • System reliability and stability (minimal downtime or errors)
	 • Ease of maintenance and configuration
	 • Responsive, effective vendor support
	 • Fast, functional performance across all core features
	 • Successful integration with existing University systems and workflows
	 • User adoption and satisfaction among staff and students
	 • Achievement of project timelines and deliverables

**DATA INTEGRATION:**

19. What data integration tool(s) does the U of A use to currently integrate U of A Enterprise Applications? (Workday, Slate, PowerBI, ERP, etc.)?

Data integrations will be primarily between the application and Workday. For the ISS portion the application must support batch uploads to SEVIS

20. Aside from Workday Student, do all of the other ‘university systems’ with which the SaaS Platform is to integrate support integration via API, SFTP, or webhooks?

Most tools support one of those forms of integrations.

**USER ACCESS & ROLES:**

21. How many staff will access the system?

Study Abroad: Approximately 30 staff will need varying levels of access, and about 100 faculty each year will need review access.

ISS: Around 15 staff members within ISS will access the platform regularly. Depending on how the scholar requests are set up, around 25 departments would need departmental access.

22. How many students will access the portal?

* 1. Study Abroad:
		1. **Study Abroad (AY 24–25)** – 2,504 applicants, 3,192 applications (includes withdrawn)
		2. **Study Abroad Scholarships (AY 24–25)** – 1,166 applicants, 1,673 applications (includes withdrawn)
		3. **Faculty Proposals to Teach (2025)** – 101 applicants, 111 applications (includes withdrawn)
		4. **Travel Registrations (2024)** – 636 applicants, 881 applications (includes withdrawn)
		5. **Inbound Exchange Students (2024–25)** – 40 applicants
		6. **Total** – 4,447 applicants, 5,857 applications (all categories include withdrawn unless noted)
	2. ISS: Close to 2200 admits, students and alumni will access the platform per semester.

23. Do you have staff who need full access vs limited access? If so, please detail how many staff need full access vs. Limited access?

Study Abroad: Yes. Approximately 30 staff will need full access, 30 will need light user access, and about 100+ faculty plus 30 departmental liaisons (referred to internally as campus champions) will need limited review access.

ISS: Approximately 20 staff members of ISS and International Admissions will need full access, while the 35 departmental users would have limited access. An additional 100+ faculty will be included as secondary approvers in a forms workflow.

**AUTOMATION & AI:**

24. Do you want the ability to use AI to automate several of the processes and interactions with the students?

We do not currently use AI for this purpose, but we are open to using it to automate processes and interactions with students.

**DATA VOLUME & GROWTH:**

25. What is your current total data volume for constituent records and related documents?

 We are not able to answer this question at this time

26. What are your annual data growth projections?

While we foresee a small decline for the next few years, we are hopeful to return to a 5% increase per year in the near future.

**DATA CHALLENGES:**

27. Are there specific types of data (e.g., video, high-resolution images, large data sets for analytics) that are particularly storage-intensive and present unique challenges?

Besides plain text, the main media that needs to be stored would be scanned images of passports, identification photos, etc.

If the platform were to support instructional videos, we would utilize that feature.

**DOCUMENT MANAGEMENT & LIFECYCLE:**

28. How do you currently track and manage the lifecycle of these documents, from creation to archival?

Currently Sunapsis stores all current and legacy data without a policy for removal. If we needed to develop a policy for archival with a new vendor.

29.Do you have specific requirements for data retention and archival, particularly for historical records that must be maintained for compliance?

Federal regulations require record retention for 3 years after degree completion, or completion of OPT or STEM OPT. In addition, we are required to follow the university document retention policy and would seek counsel from university officials for additional best practices related to this project

30. Are you looking for a solution to consolidate all document storage within the SaaS platform, or do you require a hybrid approach with your existing document management systems?

All current, prospective and alumni within OPT or STEM OPT records would need to be stored in the new platform. I would consult with our IT personnel to learn whether we could store the records of previous students elsewhere who have not yet passed the 3 year record retention requirement.

31. If U of A would like the SaaS Platform to leverage an existing document management system, please confirm which specific document management system (software name and vendor) it should integrate with.

University is open to options proposed by the vendor

32. Does your existing document management system have the capability to ingest files from a server folder and using a standard naming convention, attach to the correct student? (e.g. file name: ID###321-STAB-GovID.png)

University is open to options proposed by the vendor

**BACKUP, ARCHIVAL & RETRIEVAL:**

33. What is your current backup and restore strategy for your critical institutional data?

University is open to options proposed by the vendor

34. Do you have a formal data archiving strategy? If so, what is the process for moving old or inactive data out of your live production environment?

University is open to options proposed by the vendor

35. What are your business requirements for accessing archived data? How quickly must it be retrievable?

University is open to options proposed by the vendor

36. How important is the ability to restore data to a specific point in time, even if it's just a single record?

University is open to options proposed by the vendor

# GENERAL QUESTIONS

1. Can the University describe the level of experience it expects vendors to have in supporting SEVIS Compliance in a production-ready environment (e.g., 10 years)?

*No defined number of years for level of experience*

1. Does the University prefer vendors who have existing enterprise contracts with multiple institutions and demonstrate success in multi-stakeholder implementations at flagship campuses?

The university does not necessarily prefer existing contracts. We will weigh and balance the merits of each proposal and decide based on which proposal best fits the university’s requirements.

1. In evaluating “innovative” sponsorship strategies, how will UA distinguish between feature novelty and meaningful, measurable outcomes tied to institutional goals?

The University of Arkansas strategic plan associated with this project are Student Success and Research Excellence. A successful platform will enable advisers and students to perform tasks without platform disruption or complication. Departments requesting visiting scholars will also be well equipped in their request to host a new scholar.

1. In Section A. STUDY ABROAD (STAB) FUNCTIONAL REQUIREMENTS, no. 7. Risk and Emergency Compliance, on page 4, the RFP references *SafeCheck*, which we understand to be a proprietary feature of a specific vendor. Could the University please confirm whether this was intended or what underlying objectives will be considered?

This has been amended to state: “Includes an emergency notification and location check-in system that enables administrators to send mass alerts (e.g., SMS/email) to travelers and collect responses to confirm safety and location status during incidents or emergencies.”

1. Does the University of Arkansas prefer vendors who can offer tiered levels of Professional Services for their solutions as needed?

The University of Arkansas is open to any professional services structure a vendor wishes to propose. However, our preference is for a comprehensive service model rather than tiered levels of service.

# STUDY ABROAD

1. Would the University of Arkansas Study Abroad Office want platform-embedded program specific and term-specific Cost Sheets? Or does the UI Study Abroad Office intend to continue to use PDF and/or Excel cost sheets that are hyperlinked to the program webpages?

We would prefer embedded cost sheets if possible.

1. Does the University of Arkansas Study Abroad Office want the ability to use Course Approvals for in the program application process?

No, we use our own internal software for course approvals and will not be seeking this from the vendor.

# STUDY ABROAD - Risk & Emergency Compliance

1. Does the University of Arkansas Study Abroad Office want options to send location-specific incident notifications ***directly*** to student travelers via email, SMS, and/or push notifications?

Yes, we would like the option to send via email, SMS, and push notifications.

1. Does the University of Arkansas Study Abroad Office want to automatically send worldwide incident notifications to student travelers based on student **real-time GPS location** rather than “static” itinerary location only?

Yes, we would like to have that capability.

# STUDY ABROAD - Usability and Support

1. How many total study abroad programs do you offer at the University of Arkansas?

We currently list hundreds of programs.

1. List the different types of programs you offer (i.e. short-term, semester, yearlong, etc.)

We offer all program types and need the ability to offer any type for any term, including short-term, faculty-led, semester, academic year, and intersession.

1. How many total students study abroad each year?
	* 1. **Study Abroad (AY 24–25)** – 2,504 applicants, 3,192 applications (includes withdrawn)
		2. **Study Abroad Scholarships (AY 24–25)** – 1,166 applicants, 1,673 applications (includes withdrawn)
		3. **Faculty Proposals to Teach (2025)** – 101 applicants, 111 applications (includes withdrawn)
		4. **Travel Registrations (2024)** – 636 applicants, 881 applications (includes withdrawn)
		5. **Inbound Exchange Students (2024–25)** – 40 applicants
		6. **Total** – 4,447 applicants, 5,857 applications (all categories include withdrawn unless noted)
2. Please list all systems the new Study Abroad system will need to integrate with i.e. Workday, etc.

Primarily Workday. But in the course of that integration development, it is possible other systems might become involved. We cannot say until we get into the integration itself.

# SEVIS REPORTING - INTERNATIONAL STUDENTS AND SCHOLARS (ISS)

1. What is the number of active SEVIS records managed annually?

Approximately 2000 active records at any time, with an additional 350 in intitial status.

* 1. How many of these records are type F visas?

Approximately 1500 active student records at any time.

Approximately 350 active OPT or STEM OPT records at any time

* 1. How many of these records are type J visas?

Approximately 150 active J records

* 1. Please list any other types of visas you manage. i.e. H1-B, TN, O, P, Q

We would need profiles created for all nonimmigrants with the ability to upload documentation and indicate status for **all** nonimmigrant types.

* 1. How many OPT, CPT, and STEM requests do you process annually?

Approximately 500

* 1. Do you process employment/ permanent visas in your office or are they processed by another area? If the latter, will those offices want to utilize the system for their processing and case management? Is integration with USCIS and FLAG a preferred requirement for these cases?

No, H-1B and LPR cases are handled through legal counsel and would not be utilizing this platform

1. Do you require internationals to pay fees online using a credit card? If yes, which payment vendor do you work with at the University of Arkansas for online payments?

This is an idea in development without any current implementation.

1. Please provide a list of the systems the new SEVIS Reporting (ISS) system will be required to integrate with i.e. Workday, Slate, etc.

SEVIS, Workday, Slate, Olark Chat

# UNIVERSITY-WIDE TRAVEL REGISTRATION REQUIREMENTS

1. How many travelers (unique individuals not trips) will you have annually?

Approximately 1,000 non–study abroad travelers annually.

* 1. How many students will be traveling using the new system?

Approximately 250 non–study abroad student travelers annually.

* 1. How many faculty and staff will be traveling using the new system?

Approximately 700 non–study abroad faculty and staff travelers annually.

1. Do you utilize an export control process currently as part of your travel registry process for international travel? If yes, please provide the following information:

This is not part of the process in the CRM platform; it is handled externally through Workday.

* 1. Is this process automated currently?
	2. An example of any export control forms needed.
	3. An example of the routing workflow required for approvals.
1. Will there be any third-party system integration needed for the New Travel Registry system, i.e. Workday, Concur, Chrome River, etc. Please provide a list of all systems where integration is required.

We do not. This could be something to explore in the future.

1. What travel insurance provider is used for the University currently? Will the new Travel Registry system be required to integrate with them?
The University uses CISI, although not every traveler is required to enroll.

No integration with the Travel Registry system will be required.

1. We understand that the University of Arkansas, as a federally funded research institution, is subject to NSPM-33 requirements related to research security and compliance. Could you confirm whether the RFP scope includes functionality and processes to support full NSPM-33 compliance, including the collection, management, and reporting of disclosure data in alignment with federal guidance?

This is not part of the project scope

# CROSS-CUTTING SYSTEMWIDE REQUIREMENTS

1. For authentication, what SSO method will be used for all new systems?

Microsoft Entra SSO

1. What type of system integration will be used for the new systems, i.e. flat-file, APIs, Webhooks?

The University of Arkansas is open to the approach the vendor proposes.

1. How many end users will need to go through training per system?

Approximately 30 users will need full training and access, and at least 100 faculty and staff each year will need lighter training for program review.

Approximately 20 users will need full training and 25 departmental users can receive lighter training.

* 1. Travel Registry-

For Travel Registry, 5–10 users will need training.

1. Does the University of Arkansas want the ability to create global dashboards with aggregated data within the new platform for all solutions without having to export the data to other solutions like Power BI, Tableau, etc.?

Yes

1. What is the desired go-live date per system? I.e. Study Abroad, Travel Registry and International Student and Scholar Management.

The Study Abroad Office desires the study abroad and international travel registration systems to go live within 70 days of contract signing. Implementation activities cannot take place during the month of February.

The ISS office desires the international student platform to go live within 180 days of contract signing. Implementation activities cannot take place in late July or August.

1. For "full users" who work in recruiting, admissions, and student success, how many users will need to perform administrative tasks in the system, including configuration, creation of reports, workflows, templates, and business process rules? This license includes all the Light User License functionality.
	1. From Study Abroad: 30 full users.
	2. From ISS: 20 full users

1. How many "light users" Admissions staff would use the CRM beyond the Full User License calculated above?
	1. Study Abroad: 30 light users.
	2. ISS: Approximately 35 light users

1. How many Advisors would use the CRM beyond the Full User License calculated above?
	1. Study Abroad: 100+ faculty and 30 departmental liaisons (referred to internally as campus champions).
	2. ISS: None, unless you mean the routing of forms for secondary approval, in which case 100+ faculty.

1. How many users will interact directly with prospects, applicants, students, and others via live chat
	1. Study Abroad: We do not currently use a live chat feature; while it may be useful in the future, it is not a requirement at this time.
	2. ISS: 4 staff members advise students through live chat. The platform we currently use for this is Olark Chat.

1. How many SMS long codes (10-digit telephone numbers) are needed to be assigned to specific users, departments, or remain generic for texting constituents?
	1. Study Abroad: One generic number for sending outbound messages.
	2. ISS: One generic number, though we do not currently use sms messaging.

1. How many long code SMS inbound and outbound text Messages in the USA are needed monthly?
	1. Study Abroad: Ability to text up to 2,000 students and travelers abroad at any given time.
	2. ISS: Ability to text up to 2000 international students currently in the United States. We currently do not use SMS messaging.

1. How many applications are received in a year?
	1. Study Abroad:
		1. **Study Abroad (AY 24–25)** – 2,504 applicants, 3,192 applications (includes withdrawn)
		2. **Study Abroad Scholarships (AY 24–25)** – 1,166 applicants, 1,673 applications (includes withdrawn)
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		5. **Inbound Exchange Students (2024–25)** – 40 applicants
		6. **Total** – 4,447 applicants, 5,857 applications (all categories include withdrawn unless noted)
	2. ISS: Approximately 1000
2. How many contacts for recruiting do you purchase in a year?
	1. Study Abroad: We are not currently collecting recruiting contacts, but anticipate adding approximately 3,000–5,000 per year in the future.
	2. ISS: International recruitment is handled through a separate office which would not use this platform.

1. Does UA Fayetteville anticipate adding dedicated staff for CRM administration?
	1. The Study Abroad Office does not currently have, nor does it anticipate adding, dedicated staff for CRM administration.
	2. ISS: We have a non-technical ISS Systems Manager who will make administrative changes as needed.

GENERAL QUESTIONS

 1. How many 'active' SEVIS records does the University of Arkansas have?

 Approximately 2,000, with another 350 in initial status at any point in time.

1. How many Study Abroad travelers does the University of Arkansas plan for yearly?

**Answer:** From Study Abroad: In AY 2024–25, we have 2,504 study abroad applicants (3,192 applications, including withdrawn). Across all related categories, the total is 4,447 applicants and 5,857 applications. The breakdown is below:

* **Study Abroad (AY 24–25):** 2,504 applicants, 3,192 applications (includes withdrawn)
* **Study Abroad Scholarships (AY 24–25):** 1,166 applicants, 1,673 applications (includes withdrawn)
* **Faculty Proposals to Teach (2025):** 101 applicants, 111 applications (includes withdrawn)
* **Travel Registrations (2024):** 636 applicants, 881 applications (includes withdrawn)
* **Inbound Exchange Students (2024–25):** 40 applicants
* **Total:** 4,447 applicants, 5,857 applications (all categories include withdrawn unless noted)
1. How many 'non–Study Abroad' travelers does the University of Arkansas plan for yearly? – Answered Above
2. On page 2 of the RFP document you have listed the following:

*The selected vendor will also lead redesign migration and long-term maintenance of UofA's hogsabroad.uark.edu and isslink.uark.edu websites delivering a streamlined accessible user-friendly interface. Integration with enterprise systems including Workday, Slate, SEVIS, Olark Chat, and broader university web environment is required*. We are not seeing specific requirements or areas on pricing sheet in order to respond to this portion of RFP.

Hogsabroad.uark.edu is the URL for the study abroad CRM interface
isslink.uark.edu is the URL for the international student scholars interface
These are not separate websites; integration with additional services is part of broader implementation of the CRM

1. In Section 14 of the RFP, please clarify the mention of ‘configure’. Specifically, are we to be doing the configuration or your items/programs vs. training you to configure?

By “configure” we mean that the selected vendor will perform the initial configuration of our content and programs. As part of implementation, the vendor should also provide training so our staff can make future configuration changes.