



## **Procurement and Contracting Services**

### **Request for Proposals for a Study Abroad Application and Program Management System**

#### **ADDENDUM #1**

**Please mark all proposal submission  
Envelopes with the following information**

**Sealed RFP #L192309  
Due on February 15, 2023 no later than 2:00 PM, MST**

The following questions were received prior to the close of the Technical Question period on January 13, 2023 at 12:00 PM MST:

1. We have an existing agreement with the U of A in place already, can we defer to that agreement to bypass legal signatures on documents included in the RFP?

This RFP will require a separate agreement.

2. How many people would need access to the marketing tool (people who create emails, marketing content, communication plans, etc.)?

We estimate that 2-4 people would need access to this tool.

3. How many non-marketers (recruiters, etc.) would need to be able to access marketing-created/branded email templates for one-off or small group sending. These templates would be created by the marketing team and have appropriate branding, compliance standards, etc.

We estimate that 8-10 people would need this access, but this number could grow as we scale up our operations to meet our goals.

4. How many total emails would be sent in a given year (1 email to 1,000 people = 1,000 emails)? I had noted about 100,000 from previous conversations. Please confirm if that is still accurate.

Approximately 275,000-300,000 initially but we hope to grow our prospect pool and scale up our email marketing over the next few years so ideally this number would increase over time.

5. Regarding text messaging, is the intention to utilize mass & automated text messages (such as a message to a large group, or auto-reminders to an individual at a moment in time), conversational (1:1) text messages, or both?

We envision using texting to send out reminders of application deadlines to our applicants, announcements about our study abroad fairs to our prospect pool and appointment reminders for students scheduled to meet with our coordinators. This would mean a combination of both auto-reminders and large group texts. We don't anticipate conversational texting needs at this time.

6. If using automated & mass text messages, how many in total would be sent in a given year (1 text message to 1,000 people = 1,000 text messages)? Please note, do not include 1:1 "conversational" text messages in this number.

We anticipate sending 75,000-100,000 texts per year. Our primary audience is main campus undergraduate students based in Tucson. We do not see a need to text outside of the US or Canada.

Examples:

- a. You send 1,000 text messages (a mass text message) to a list of people reminding them of an event tomorrow. Include
  - b. You automate a text message confirmation for everyone who signs up for an event. Include
  - c. A recruiter has a 1:1 conversation via text message with a prospect (through Salesforce). Don't Include
  - d. Would there be any substantial portion of text messages that would be for audiences outside of the US or Canada? If so, please elaborate.
7. What is the total number of unique individuals that you would be communicating with (the number of unique email addresses)?

Currently a little over 10,000, but we would like to at least double that number over the next few years.

8. Is coordinated advertising (coordinated with email & text messages) an important component of your marketing efforts? If so, would you be looking to incorporate the ability to create targeted advertising audiences that update in real time based on an individual's behavior? For example, if a prospect is no longer responding to emails or texts, based on that criteria they automatically see an advertisement about applying.

We aren't doing this now but we'd be curious to hear more about what you could offer in this area.

- a. If advertising as mentioned above is important, how many total unique audience segments would you anticipate wanting to advertise to at any given time?

This isn't something we have considered. It might depend on what you would propose above.

9. Is web personalization in real-time important? For example, a previous anonymous visitor navigates from your main website to your application page. Upon their return visit to your main website (while still anonymous), instead of seeing the same general webpage, they see a reminder about the application deadline and link to complete since we know that they previously looked at it. Would this require building our website in your system? How would this be visualized?

A general return page is fine.

10. How many monthly unique website visitors do you have?

It varies depending on the time of year, with summer months dipping down to numbers like 8,000, while busy months during the semester can reach close to 20,000.

11. General: Do we have permission to make changes to the institution's current sandbox site to demonstrate system features which meet RFP criteria?

No, but a sandbox site in Drupal can be created for testing.

12. 5.1.16: Ability to collaborate with other departments within the system including sharing documents and updating student data, adding comments, etc.: Is there a specific way in which you want to collaborate with other departments? Please describe the collaboration processes. Does "sharing documents" mean having access to study abroad application documents, or something else? If not study abroad application documents, what documents would you like to share?

For example, we currently have an item in our applications that, once submitted, our Transfer Credit Office gets a notification that they have an item ready for review. They then log in to the system, complete the information required from their team, and mark the item "complete". At the end of the week, we get a notification of which items have been completed by their office so we can move those student applications forward. We have a similar system in place with our Campus Health team for another application item.

So primarily we would need outside university departments to have specific access to and be able to work with certain application items/documents at this time.

13. 5.1.21.5: Ability to apply tags or affiliates: Can you please specify what you mean by "affiliates"?

Tags = location, term, major, etc. (defines student)

Affiliation = source or how we know them. How did they interact with us? (defines the relationship)

14. 5.6.4: Transferability of data from one system to another: Terra Dotta has a process for migrating information from legacy systems into Terra Dotta. Can you please clarify what specific systems you are referring to and what specific data? Also, is this question referring to one-time transfer or ongoing/multiple transfers?

We would like to be able to pull our student application data to transfer to a new system and also have good integrations with other University and office systems.

15. Cloud Software Appendix:

- a. Does the University have a preference for a Cloud based Implementation. If Yes, which Cloud Vendor do you prefer. In terms of costing, need to know who will pay for the Cloud Vendor Services & the Infra Cost ?

There are several Cloud Vendors in use at the university, but we are only using one for our web hosting – Pantheon. They only host Drupal and WordPress applications.

- b. If you have an existing Cloud Vendor pls provide details?

As mentioned above, we only use Pantheon for web hosting, and I don't know what platform is used for our current Study Abroad application system with Terra Dotta.

- c. if the vendor is a pure Software Solution Provider then what obligations, apart from software development, delivery, installation , training and support will apply?"

Since Pantheon only supports Drupal and WordPress applications, another cloud solution will most likely be necessary to host the Study Abroad application system.

16. Cloud Software Appendix: What is the preference for the delivery of the software. Does it need to be within the universities private cloud infrastructure, or would be a traditional SAAS offering preferred

SAAS outside the university's private cloud infrastructure would be preferred as that is how our current application system works.

- 17.4.27:Insurance Clause - Will the University accept Global Insurance Coverage as normally given by International Vendors?

Any request to change insurance requirements would need to be made in the contracting phase. The University would review any vendor requested insurance changes but is under no obligation to accept them.

- 18.5.1.1:"Related to SIS, It is assumed that existing Users, Roles, Permissions, and Access related activities. The SIS is Internal/govt provided? (To clarify the source)

Yes, access and privileges should be provided by the university's authentication system.

- 19.5.2.1: "It is assumed that data from the SIS system that needs to be integrated with for data ingestion is to do with the following type of feeds:

- a. User Details

- b. Role based information
- c. User access controls"

Correct.

20.5.1.1: Are there existing API's available for integration with the current system or do custom integrations need to be built?

There are existing API's for accessing SIS data.

21.5.1.15: Does historic student information from the SIS system need to be migrated? If yes what is the span for the data?

Yes, all available.

22.5.1.1: How many data interfaces would need to be considered for integration with the SIS system

The University cannot respond to this question as it is unclear.

23.5.1: Does the software/product being provided need to integrate with an existing Application & program management system or is it required for application and program management to be configured ground up in the new system?

We are looking to rethink our application and recruitment process so this would be a new system, not an integration with our current application and program management tool.

24.5.1.14: What are the expected volumes for the notifications sent out to administrators and students on a daily basis across the application process?

While it is not currently heavy on a daily basis, at certain times of the application cycle we do send notifications to every applicant in the system. Administrators receive notifications of applications opened, applications submitted, and program commitments completed every 24 hours. This is our most frequent auto-notification.

We also use notifications for the following:

- reminders/info to the applicant groups (manually sent, based on program coordinators' need, a few times per app cycle)
- acceptances/rejections/program cancellations (manually sent, based on program dates/deadlines)
- automatic notifications for Next Steps based on:
  - application opened
  - application submitted
  - when an item is missing (eg. passport)
  - a few other specific scenarios

- We would like there to be no hardcoded system auto-notifications sent, especially if they are not customizable
- As a group, we would send more notifications or emails through the system if they were highly customizable and “prettier” so we anticipate volume could grow.

25.5.1.17: Do transmission services need to be catered to by the solution vendor for outbound communications/notifications or is the vendor required to integrate with existing communication gateways being used by the university?

The University cannot respond to this question as it is unclear.

26.5.2.1: How many non SIS systems would need to be considered for integrations as part of the project scope?

TBD based on scope of selected vendor services.

27.5.7: We assume the contract period will be for 1 calendar year from the date of completion of implementation phase

We are planning on a 5-year agreement with an initial one-year term.

28. General: We assume the future Enhancements / Change Requests / Requirements after SRS sign-off will be addressed through mutually agreed CRQ process.

Yes, based on scope of selected vendor services.

29. Method of Payment -- Apart from Credit Card can we expect Payments to Bank Account directly?

Yes.

30. Payment Milestone: We understand same needs to be provided by the Vendor along with other Payment Terms

The University did not include milestone payments as part of this RFP. Please respond to the payment terms question in 5.0.

31. What is your Student Information System?

PeopleSoft

32. Approximately how many students enroll in the Study Abroad program(s) annually?

1400 with a goal of 3000 over the next few years; total applications may be double these amounts. We know this is an ambitious goal so we need a tool that can support rapid growth.

33. How many total users will be utilizing the CRM system?

Approximately 15-20 users and roughly 10,000-20,000 contacts.

34. How many users will be higher level system administrators?

2-3 highest level; General administrative access around 15 – 20.

35. What CRM is the University currently using?

The university uses Sales Force for enrolled students.

36. How would you define an email journey in relation to your needs or can you provide an example? (5.1.17.7 Prospects move from one email journey to another based on triggers)

An email journey is a behavior-based set of automated emails that move a student forward in the process from prospect to applicant to enrolled to alumni. For example, a student would receive prospect emails until they apply, which would trigger them to stop receiving prospect emails and start receiving emails for applicants and so on through the process.

37. We would like to have our Terms of Service reviewed as part of the RFP, where would you like us to incorporate them?

You may include your Terms of Service as part of your response, however, this in no way implies acceptance of any included terms. There is no specific order in your RFP response where you must include them.

38. What Payment Gateway are you currently using and/or wishing to integrate with?

It's through our current vendor and Cybersource.

39. Would you prefer to have the option to lock in pricing with a 5 year agreement vs a 1 year with 4 optional renewals?

We're only interested in 1-year pricing at this time.

40. Can you please provide clarity on who you consider an "external partner" (5.1.2)

Contracted partners/vendors that are outside of the university.



41. We charge by the number of on-site travelers (travelers in a committed status). How many on-site travelers do you estimate for the annual contract year? Years 2-5?

Our current enrollment is projected for 1400 travelers this year and would estimate at 1800, 2000, 2200, 2500 for the upcoming years.

42. When you mention external partners permissions and the “ability to integrate with non-SIS systems, such as travel registries, marketing tools, CRMs, payment vendors and lead form” could you provide a list of partners and systems for integration?

Dependent on selected vendor and gaps that need to be filled. Examples could include Sales Force, Terra Dotta, Less Annoying CRM, Cybersource.

43. When you mention “program budgets” do you mean the individual departments and how it relates to form and record management? Or does this refer to different types of program budgets?

We are referring to student-facing program costs so that students can see the billable and non-billable costs associated with each program.

44. Could you expand on your requirements for itineraries? Is it possible to describe how itineraries fit into application and record workflows?

We would like dates and locations for time abroad to be attached to the program/student and for that data to be searchable and exportable for reporting and tracking purposes. This allows us to know who is where on any given day.

45. Could you please also expand on your requirements for program matching? Would this be a separate website, a form by itself, or part of a larger form?

Students respond to a series of questions which act as tags to identify best-fit programs. Interface should be user friendly and visually appealing.

46. How many applications per year do you expect?

Estimated between 1400-3000 enrolled students but the total number of applications could be double this amount.

47. What is your application fee?

\$50.

48. Does “Two-Way outlook Integration” include calendar integration as well as email?

At a minimum we need calendar integration; ideally both.

**End of addendum, all else remains the same.**