QUESTIONS AND ANSWERS
GMU-1773-22
Comprehensive Campaign Counsel

Responses are in RED.

1. What CRM platform does Mason use?
   a. Mason is using Ellucian Advance Web database.

2. Is Mason contemplating migrating to a new system and if yes, in what time frame?
   a. Mason is currently implementing Salesforce with Affinaquest, with an expected go-live of April 15, 2022.

3. What is the date of the most recent wealth screening and which vendor performed it?
   a. The most recent wealth screening was in July 2020 using Blackbaud’s Target Analytics.

4. Is there a proposal page limit requirement?
   a. No

5. How much are you currently raising annually? Of that, what is the breakdown between individuals, foundations, corporations, and public funding?
   a. Please see attachment A

6. Can you provide a breakdown of the top three schools by the percentage of total support raised for the past three years?
   a. Please see attachment A

7. Can you share an organizational chart of the University Advancement and Alumni Relations team?
   a. Please see attachment B

8. How many frontline fundraisers do you currently have, and are they deployed centrally, by school/unit, or both?
   a. We have 35 FTEs (Director, Associate Director, Assistant Director); 15 of which are at the director of development level within a School/College/Unit; 14 of which are within the teams within a School/College/Unit (Associate Director: Major Gift Officer; Assistant Director: Leadership Annual Giving); 3 are within the central University Priorities team; 3 are within the central Corporate and Foundation Relations team. Please reference attachment B (Organizational Chart).
   We are considered a hybrid structure: the teams physically sit within the School/College/Unit except for central teams (University Priorities and CFR). Funding of the directors of development are typically split between the Dean’s and Vice President of Advancement budgets.
9. What database system do you use? How many total records are in the database? How many have email addresses? How many are donors?
   a. Ellucian Advance Web
   b. Total Records = 522,300
   c. Number with email addresses = 304,370
   d. Number of donors = 151,986

10. Have you ever conducted a comprehensive wealth screening on the database? If so, when was the most recent screening conducted, and which vendor was used?
    a. The most recent wealth screening was in July 2020 using Blackbaud’s Target Analytics.

11. What are the primary strengths and challenges of your current prospect management system?
    **Strengths:**
    a. Policies and procedures are fully developed
    b. Two central staff dedicated to the prospect management system
    c. New CRM to fully manage and track prospects
    **Challenges:**
    a. Gift Officer adherence to prospect management policies and procedures
    b. Change management around new CRM usage
    c. Decentralized gift officer management

12. Do you have a consolidated CRM system for donors and alumni?
    a. Yes

13. Could you share what you are hoping the consulting firm will target in their analysis of the information systems? What questions are you hoping to answer through this part of the internal assessment?
    a. Are the system resources sufficient to support the proposed campaign?
    b. Are users adequately trained on the systems?
    c. Do systems staff have the capability to maximize the potential of the information systems

14. Do you have a firm idea of the priorities that will be included in the campaign? If so, could you share them?
    a. Not at this time. The university strategic planning process is underway and is projected to be announced before June 30, 2022.
       (Additional Background) The objective of this process will be to develop an actionable, five-year strategic plan that affirms our vision and mission and solidifies the direction for Mason through targeted priorities, strategies, and actions. To help facilitate this effort, we have engaged Attain Partners, a local consulting firm, which will work closely with our established Steering Committee, Working Group, and the Mason community to gather feedback from leaders, faculty, staff, students, alumni, and others to help inform the strategic direction of the university. In addition, as we examine the best articulation of Mason’s vision and mission, we will collaborate with the ongoing brand refresh exercise led by the Office of Communications and Marketing.

15. Is there an aspirational goal and timeframe being discussed for the proposed campaign?
    a. We would look to the advice of our campaign consultants based on the analysis of our data. Initial discussions are surrounding a $1B comprehensive campaign, with the public launch to take place within the next 18 months.
16. Will the University be leading the writing efforts of the preliminary case for support to test with external audiences, or will you need assistance in writing the document?
   a. This is still to be determined. Advancement has a small communications team separate from the Office of Marketing and Communications, but we will likely seek assistance in refining the case for support.

17. Who do you identify as peer and aspirant institutions? Are there specific benchmarking areas in which you are interested?
   a. In working with EAB, below are institutions that share our ‘Fundraising DNA’ and have been used as our benchmarking cohort when analyzing Fundraiser Productivity and ROI (in FY20).

<table>
<thead>
<tr>
<th>Institution</th>
<th>Control &amp; Classification</th>
<th>Alumni (All/Undergrad)</th>
<th>Enrollment (All/Undergrad)</th>
<th>Endowment</th>
<th>Campaign Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>George Mason University</td>
<td>Public Research</td>
<td>199,396/129,755</td>
<td>37,863/26,662</td>
<td>$154M</td>
<td>None</td>
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<td>California Polytechnic State University</td>
<td>Public Master's</td>
<td>175,146/166,796</td>
<td>21,426/20,503</td>
<td>$226M</td>
<td>Public</td>
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<td>Florida International University</td>
<td>Public Research</td>
<td>219,278/174,745</td>
<td>58,711/49,326</td>
<td>$219M</td>
<td>Public</td>
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<td>Illinois State University</td>
<td>Public Research</td>
<td>202,345/184,774</td>
<td>20,878/18,250</td>
<td>$151M</td>
<td>Public</td>
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<tr>
<td>Oregon State University</td>
<td>Public Research</td>
<td>198,845/162,686</td>
<td>31,719/26,247</td>
<td>$615M</td>
<td>Quiet</td>
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<td>University at Buffalo</td>
<td>Public Research</td>
<td>222,440/152,940</td>
<td>31,923/21,921</td>
<td>$789M</td>
<td>Public</td>
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<td>University of Alabama at Birmingham</td>
<td>Public Research</td>
<td>133,824/81,439</td>
<td>22,080/13,836</td>
<td>$522M</td>
<td>None</td>
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<td>University of Cincinnati</td>
<td>Public Research</td>
<td>296,020/195,741</td>
<td>39,263/28,376</td>
<td>$1.4B</td>
<td>Public</td>
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<td>University of Illinois Chicago</td>
<td>Public Research</td>
<td>249,802/151,987</td>
<td>32,324/21,641</td>
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<td>University of Rhode Island</td>
<td>Public Research</td>
<td>134,930/114,618</td>
<td>17,465/14,548</td>
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<td>Public</td>
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<td>Wayne State University</td>
<td>Public Research</td>
<td>279,167/166,022</td>
<td>26,824/17,643</td>
<td>$425M</td>
<td>None</td>
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</table>

18. Do you have a timeline in mind for when work should begin, key milestones, and deliverable and presentation due dates?
   a. The high-level draft timeline includes:
      December 2021: Campaign Consultant contract is finalized.
      January 2022: Contract work begins
      March 2022: Initial Planning Study Report
      July 2022: Develop Final Case for Support
      September 2022-April 2023: Public launch
19. What unique issues or opportunities will be important to consider or navigate as you consider a campaign?
   a. We are currently in a CRM conversion (Ellucian Advance to Salesforce with Affinaquest) with a projected go-live date of April 2022.
   b. Data accuracy/acquisition on constituents.
   c. The Alumni participation rate in FY21 ended at 2.73%. We have a goal of 10% alumni participation by June 30, 2027.
   d. Inadequate Resources/Staffing: In working with former campaign counsel, we are significantly understaffed for a $1B (anticipated) campaign.
   e. Our last campaign had very limited volunteer engagement.
   f. Acquiring new donors.

20. In Section NN#2 – University Data, it says that “University Data, including any back-ups, will not be accessed, stored, or transferred outside of the United States without prior written consent from Mason.” Our tenant (cloud-based provider) is based in Canada, where all of our data is stored and moves back and forth between Canada and US datacenters. Will this preclude us from responding to the RFP?
   a. No, we will review with Legal if moved to award.

21. Can you share details on your previous experience with fundraising consulting firms (firm name and types of services provided)?
   a. Marts and Lundy (Faster Farther Campaign Consulting Firm; departmental assessments; feasibility study; on-going counsel, and post-campaign study)
   b. The Compass Group (On-going fundraising counsel, volunteer leadership development, prospect gift charts, and coaching)
   c. Bentz Whaley Flessner (BWF) (Draft Case Prospectus, Feasibility Study)
   d. Grenzebach Glier & Associates, Inc. (GG+A) (Benchmarking studies, Departmental assessments: staffing headcount)