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**REQUEST FOR PROPOSALS
GMU-1773-22**

ISSUE DATE: October 20, 2021

TITLE: Comprehensive Campaign Counsel

PRIMARY PROCUREMENT OFFICER: Erin Rauch, Assistant Director, erauch@gmu.edu
SECONDARY PROCUREMENT OFFICER: Sandra Magnani, Senior Buyer, smagnani@gmu.edu

QUESTIONS/INQUIRIES: E-mail all inquiries to both Procurement Officers listed above, no later than 4:00 PM Eastern Time (ET) on October 28, 2021. **All questions must be submitted in writing.** Responses to questions will be posted on the [Mason Purchasing Website](#) by 5:00 PM ET on November 2, 2021. Note: Questions must be submitted in WORD format. Also see section III. COMMUNICATION, herein.

PROPOSAL DUE DATE AND TIME: November 17, 2021 @ 2:00 PM ET. **SEE SECTION XIII.A.1 FOR DETAILS ON ELECTRONIC PROPOSAL SUBMISSION.**

In Compliance With This Request For Proposal And To All The Conditions Imposed Therein And Hereby Incorporated By Reference, The Undersigned Offers And Agrees To Furnish The Goods/Services In Accordance With The Attached Signed Proposal Or As Mutually Agreed Upon By Subsequent Negotiations.

Name and Address of Firm:

Legal Name: The Compass Group, Inc

Date: 11/17/2021

DBA: _____

Address: 124 Quay St

By: 
Signature

Alexandria, VA 22314

Name: Robert Bull

FEI/FIN No. 54-1689930

Title: President

Fax No. _____

Telephone No. 443-838-1386

Email: rbull@compassgroup.com

SWaM Certified: Yes: X No: _____ (See Section VII. SWaM CERTIFICATION for complete details).

SWaM Certification Number: 814907

This public body does not discriminate against faith-based organizations in accordance with the *Governing Rules*, § 36 or against a Bidder/Offeror because of race, religion, color, sex, national origin, age, disability, or any other prohibited by state law relating to discrimination in employment.

GEORGE MASON UNIVERSITY

SMART CAMPAIGN PROPOSAL

NOVEMBER 2021

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INTRODUCTION

LETTER FROM THE PRESIDENT

November 2021

To whom it may concern:

It has been an honor to serve for the past 24 months as fundraising counsel to George Mason University. On behalf of the Compass Group, I am pleased to present this proposal for continued services in response to RFP GMU-1773-22.

Now the largest public research university in the Commonwealth, and with the appointment of President Gregory Washington, Mason embarks on a strategic planning process that will yield this coming spring the boldest plan in the history of the institution, and thus require one of the most comprehensive fundraising efforts to support it. University Leadership, Central Advancement and volunteer leaders will be required to play key roles in this comprehensive campaign and Compass would welcome the opportunity to be a valued partner in this important work.

While the attached document will provide the required introduction to Compass and describe how we would conduct Smart Campaign Services to include a Readiness Assessment, a Feasibility Study, and Campaign Counsel, there are some points that I would like to highlight:

- Compass is a hands-on consulting firm. We do not just give advice. We roll up our sleeves and work alongside your staff and board to build strong fundraising teams.
- We have four overarching goals for our clients as they are managed through a Smart Campaign:
 - You surpass your campaign goal on time and under budget.
 - You build your capacity to raise more funds on an ongoing basis as a result of this effort.
 - Your boards are more involved, informed, and actively engaged in fundraising than before the campaign.
 - A larger cadre of volunteers has been trained, utilized, and stewarded as a result of being involved in this campaign.
- Our Readiness Assessments and Feasibility Studies are data-driven, and our recommendations are founded on the information provided and discovered during the Assessment/Study process.
- Compass has extensive and successful experience working with higher educational institutions.
- Compass prides itself on providing appropriate training for both boards and staff as well as accountability, motivation, and strategy.

- The quality of work provided by Compass is unsurpassed. It is client-centered and tailored for the needs and plans of each organization.

Proper planning for a campaign is critical to its success. As you think about your phases and timetable, they should align with the following goals:

- Aligning the President's Office, Deans/VPs, Central Advancement, and Development Staff with the vision and priorities emerging from Mason's Strategic Plan.
- Creating an urgent and compelling case for support.
- Identifying sufficient prospects in the right proportion.
- Building a leadership team that will work together to achieve your fundraising goals.
- Providing adequate resources to support a campaign initiative.

We believe that the service we provide goes well beyond raising the funds for this campaign and positions Mason to be more successful in the future.

We also believe that the style in which this campaign is conducted is as important as raising the funds you need to achieve your goal. The campaign plan and strategies should reflect the values and culture of Mason. The information gathered through the Assessment and Study processes will inform the creation of that plan. We are not just raising money—we are building lifelong relationships with the Mason community.

Please review the attached proposal and feel free to contact me directly if you have any questions. We look forward to discussing the merits of this proposal with you and your committee. Thank you again for considering Compass.

Sincerely,

A handwritten signature in blue ink, appearing to read "Robert L. Bull, Jr.", with a stylized, cursive script.

ROBERT L. BULL, JR.

President

THE COMPASS GROUP

The Compass Group provides customized fundraising consulting services to the nonprofit sector. Founded in 1993, our mission is to build the capacity of our clients to successfully raise more money every day. It is our understanding that every nonprofit organization has more needs than resources. We bring a wealth of knowledge and experience to our clientele and steadfast commitment to the fundamental and critical role that nonprofits play in our society.

At Compass, we take pride in our personalized service. We know that Mason has a unique culture, unique strengths, and unique challenges, and we are dedicated to building genuine, collaborative relationships with the University, its boards, its staff, and its volunteers.

Compass will work side-by-side with Mason, ensuring the right direction in fundraising. Together we will create detailed strategies, establish achievable milestones, and work hard to attain fundraising success for you – now and in the long-term.

Central to our corporate values is finding, hiring, and retaining the best people in the fundraising business. Our consulting staff brings over 100 combined years of successful service to nonprofit organizations.

Commitment to Justice, Equity, Diversity & Inclusion (JEDI)

Since its inception, The Compass Group was founded and has always included principals, officers, and consultants representing women and/or people of color. Our commitment to Justice, Equity, Diversity, and Inclusion is exemplified by as much as 40% of our client portfolio is either minority-led or mission-driven to support underserved populations. Two milestones in the history of Compass are worth noting:

1. **NATIONAL TRUST FOR HISTORIC PRESERVATION** – in 2010, Compass formed a partnership to create a curriculum to build the capacity of African American cultural and heritage organizations throughout the country. Thousands of house museums professionals and volunteer leaders, often labelled as underserved in the museum world, learned the art and science of recruiting and strengthening volunteer leaders and creating campaign plans for sustainable fundraising programs. Compass takes pride in having kept many doors open for very important cultural sites as a result of this partnership.
2. **NATIONAL MUSEUM OF AFRICAN AMERICAN HISTORY AND CULTURE** – in 2018, Compass, in collaboration with the Museum, designed and facilitated the first Historically Black Colleges and Universities (HBCU) Leadership Summit, a national convening of college presidents and their museum directors to help shape future needs for the long-term sustainability of the national network of HBCU institutions and their cultural sites. The gathering and its outcomes met with much success and has led to securing national support for Compass to co-design and facilitate a fundraising and board development curriculum and training program specifically for HBCUs. Moreover, Compass is most proud to do this important work also in partnership with Mason's very own, Mills Kelly, Director of the Roy Rosenzweig Center for History and New Media.

The first cohort of HBCUs include Clark Atlanta University, Florida A&M University, Jackson State University, Texas Southern University, and Tuskegee University.

To honor both of these partnerships, Compass recently elevated its commitment to the work for social justice causes and prioritized business development strategies to ensure and sustain it!

Learn more about The Compass Group, our core services, and past clients at www.compassgroup.com.

SMART CAMPAIGN RECOMMENDATION

Compass is committed to providing customized fundraising consulting services to Mason. Given that multiple fundraising efforts are already underway, including the School of Business and IDIA, coupled with completing a University strategic planning process in Spring 2022, the University may need to think about a multi-faceted approach to the planning and preparation phases of its campaign. Compass is proposing a more progressive and collaborative model for service implementation to ensure that the phases proposed complete themselves and Mason is prepared to take full advantage of beginning a campaign lead/major donor phase as soon as possible.

Compass is recommending that Mason institute a *Smart Campaign* strategy. A *Smart Campaign* is an industry-leading concept developed by The Compass Group that is ideal for universities that have already established a vision, made the commitment to fund that vision, and have donors that may be ready to be cultivated, and in some cases solicited early in the process. The *Smart Campaign* accelerates the cultivation and solicitation activities of a campaign while simultaneously preparing for the campaign by engaging with top donors, prospects, faculty and staff, and volunteers to develop a timeline and plan for campaign implementation. This promotes broader participation, strengthens the information gathered, enables campaign implementation to move forward, and begins cash flow much earlier.

Our *Smart Campaign* clients know they need to proceed with a fundraising effort, and in many instances, have already decided to go forward with one. The questions they face are:

- How much money can we raise?
- How can we be successful—what strategies need to be implemented to reach our fundraising and organizational goals?
- Do we have an urgent and compelling Case for Support?
- Are there enough prospects in our constituency—and in the right proportion—to reach our goal?
- Is the right leadership in place—board, faculty and staff, and volunteers—to take responsibility for the campaign?
- Do we have the resources to support the campaign?

A *Smart Campaign* approach integrates the Readiness Assessment and Feasibility Study with the preparation phase of a campaign. The same process for an Assessment and Study is completed in conjunction with initial, but important campaign tasks that optimize the academic calendar particularly for higher education. Given the urgency of this effort, customized fundraising counsel is highly recommended and is especially critical for the most efficient implementation of the assessment/study recommendations and fundraising efforts to follow.

LEVERAGING MASON-COMPASS HISTORY

Since fall of 2019, Compass has enjoyed a productive working relationship with Mason: First, to conduct a Planning Study and begin to frame a campaign for IDIA; second, to provide campaign counsel to the School of Business; and then later serving as “fundraising in-counsel” to Central Advancement during its

leadership transitions and lending support and services to Alumni Affairs/Board and the University Foundation Board.

In an effort to leverage the synergy of the University strategic planning process, continue to support and provide services for Advancement and Foundation initiatives already underway, and infuse the planning and preparation phases of a broader University-wide fundraising effort (under our Smart Campaign Services model), The Compass Group remains uniquely qualified to be a leading partner.

Critical work to *continue* through Advancement/Foundation (over the next six months):

- Manage the many partners and stakeholders participating in the campaign for IDIA;
- Support development staff and volunteer leaders for the School of Business (and during the appointment of a new Dean);
- Help implement the strategic plan and governance restructuring for the Alumni Association;
- Provide interim leadership for Central Advancement while undergoing search for two AVPs;
- Complete University Foundation Board Assessment and align governance practices with the comprehensive campaign;
- Manage performance metrics to strengthen frontline fundraisers in major gift work; and
- Engage Deans to identify funding priorities for the campaign and meet 40% fundraising time allocation requirements

READINESS ASSESSMENT

The Readiness Assessment for George Mason University will be a customized, in-depth examination of the capacity of Central Advancement in relation to the philanthropic potential of the proposed campaign. The assessment is a multi-step process that will take approximately 16-18 weeks to complete and includes:

- Benchmarking against six to eight peers and/or aspirational peers (office structure)
- Reviewing extensive data and materials
- Conducting 15 to 20 confidential interviews
- Compiling and analyzing Information
- Developing a comprehensive report
- Conducting a series of report presentations

To ensure effective implementation, Compass will create a *Readiness Assessment Preparation Guide* that will provide the information and resources necessary for collaboration on the creation of a customized plan for Mason.

The Readiness Assessment will include analysis of several components and answer these critical questions:

1. **FUNDRAISING ENVIRONMENT** – Is the philanthropic environment conducive to effective fundraising? Do communications and marketing activities effectively support fundraising initiatives?
2. **CULTURE OF PHILANTHROPY** – Is there a strong culture of philanthropy at the University and among alumni and other constituents?
3. **FUNDRAISING PERFORMANCE** – Are current fundraising methods adequate and effective? Should additional methods of fundraising be implemented? Is the current development program structured to meet fundraising potential?
4. **FUNDRAISING PLANNING** – Do fundraising plans include appropriate goals and objectives and enough detail to facilitate strategic implementation?
5. **FUNDRAISING CYCLE** – Is the major gift fundraising cycle being effectively implemented, tracked, and analyzed?
6. **FUNDRAISING TRACKING & REPORTING** – Does the development program have the technology needed to effectively track and report fundraising activity and is that technology being effectively implemented? Is fundraising tracking and reporting adequate to inform strategic short- and long-term program growth?
7. **FUNDRAISING STAFFING** – Is the development program adequately staffed with personnel who have the experience and skills necessary for success?
8. **FUNDRAISING BUDGET** – Have adequate resources been allocated to the development program?
9. **FUNDRAISING POLICIES & PROCEDURES** – Are the appropriate policies and procedures in place to effectively govern fundraising?

INTERNAL DATA COLLECTION & ANALYSIS

Access to pertinent development information, materials, and data is critical to the Readiness Assessment process. It is Mason's responsibility to gather the requested information, materials, and data on the timeline established in the preparation process. Compass analyzes these materials to evaluate existing development activities and infrastructure.

These internal materials can include:

- Strategic, Development, and Existing Campaign Plans
- Organization and Development Budgets
- Organization Charts and Position Descriptions
- Volunteer Leadership Position Descriptions
- Feasibility/Planning Study Reports (previous)
- Case for Support
- Gifts Chart
- Prospect Management Documentation

If Mason does not have a wealth screening provider, Compass can assist with selecting a high-quality wealth screening service.

Tracking & Reporting

The Readiness Assessment will include an assessment of Mason's existing fundraising tracking and reporting activities. This assessment will focus on content, production, timing, and distribution of fundraising reports in the context of the tools available to support this critical function. Mason's implementation and administration of the development database will be assessed to identify opportunities to improve data quality, quantity, and access.

Assessment outcomes will focus on developing Mason's capacity to efficiently, accurately, and appropriately:

- Track and report:
 - progress toward overall goal achievement
 - philanthropic impact
 - achievement of specific goals and objectives
 - management of prospects and donors through the fundraising cycle
 - effectiveness of specific solicitation strategies
 - results for specific constituent segments
- Conduct in-depth analysis of fundraising outcomes
- Evaluate the effectiveness of development plans based on results
- Determine the cost effectiveness of individual and overall fundraising strategies
- Develop statistical models to determine effective strategies for constituent segmentation, ask amount levels, solicitation methods and frequency
- Distribute information to constituents

READINESS ASSESSMENT REPORT

The Readiness Assessment Report will include an overview of the process, in-depth analysis of the information and feedback, relevant interview comments, significant findings, and an extensive series of actionable recommendations. As appropriate, findings and/or recommendations will be provided for all areas included in the analysis:

Fundraising Environment
Culture of Philanthropy
Fundraising Performance
Fundraising Planning
Fundraising Cycle
Fundraising Tracking & Reporting
Fundraising Staffing
Fundraising Budget
Fundraising Policies & Procedures

Recommendations will guide Mason in strategically aligning the fundraising effort to ensure campaign success and greater philanthropic resources for University priorities in the future.

The Compass Group is comprised of experienced consultants with unique skills sets that extend beyond campaign counsel into development operations, philanthropy communications, database, alumni relations, and additional institutional advancement areas. The depth and breadth of this experience will benefit Mason throughout the engagement.

The provision of an extensive series of recommendations based on Compass' relative industry experience will aid Mason in addressing any deficiencies revealed during the Readiness Assessment. These recommendations will be specific and immediately actionable, and implementation will be supported by samples and templates included as appendices to the report. Appendices may include draft job descriptions, recommended organizational charts, planning, and reporting samples and/or templates, drafts of policies and procedures, sample training curriculums, or other materials. Through the report presentation process, Mason will have the opportunity to ensure the recommendations are clear and supporting documents are adequate and facilitate implementation.

FEASIBILITY STUDY

A Feasibility Study is an in-depth examination of the elements necessary for Mason to conduct a successful campaign. This examination includes conducting personal and confidential interviews with individuals who have the potential to significantly influence campaign success through their philanthropic contribution and/or volunteer leadership.

The Compass Group's system for collecting, analyzing, and reporting data will provide the details Mason needs to make informed decisions for the future.

The Feasibility Study is implemented in the context of four *Predictive Indicators for Success*:



A **CASE FOR SUPPORT** that is urgent and compelling inspires extraordinary and timely investment in a vision for a better future. A well-articulated Case for Support includes:

- A reason for raising money that demonstrably advances the vision of the organization.
- A timeframe for securing funds correlated to addressing a critical need and/or maximizing a unique opportunity.

The Case for Support informs all communications during the fundraising effort.



PHILANTHROPIC POTENTIAL measures an organization's ability to secure contributions. It informs fundraising objectives, plans and timelines and guides strategies for engaging with constituents to secure the number and size of investments necessary to meet a significant philanthropic goal.



DEDICATED LEADERS – both volunteer and staff – motivate and influence participation and model fundraising success through their thoughts, words, and deeds.

- Volunteers are key to maximizing philanthropic potential, setting an example through their own giving and providing access to others who can also invest in the future.
- Leadership staff commit sufficient time and resources and build a culture of philanthropy that ensures support now and in the future.



STRATEGIC RESOURCE INVESTMENT ensures effective and efficient fundraising. Moving beyond basic expense budgeting, strategic resource investment directly correlates to maximizing the financial returns that can be achieved through philanthropy. With advance planning it will build fundraising capacity and potential, creating opportunities to advance current and future organizational goals and objectives.

A Feasibility Study is a multi-step process that requires careful coordination and collaboration between Mason and Compass. A Feasibility Study takes a minimum of 18 weeks to complete (depending on design and customization) and is implemented as follows:

FEASIBILITY STUDY PREPARATION

1. The Compass team creates a customized *Feasibility Study Preparation Guide* to serve as a blueprint for Mason to properly implement the Feasibility Study. This guide provides tools for completing each step in the process.
2. An orientation meeting is conducted to distribute and discuss the *Feasibility Study Preparation Guide*.
3. Working together, Mason and Compass establish a mutually acceptable timeline to prepare, conduct, and present the Feasibility Study to a designated team of staff and volunteers overseeing the work.
4. Compass assists Mason in the creation of a two- to three-page Preliminary Case Statement. The Preliminary Case Statement describes the fundraising priorities, identifies the amount of funding necessary, and defines how the priorities fit in the context of Mason's completed strategic plan.
5. Mason and Compass mutually determine the final number of interviews needed (approximately 50) to statistically validate Feasibility Study outcomes.
6. Mason and Compass collaborate on the creation of a pool of potential interview candidates. These candidates must be individuals who can be significant donors, potential fundraising volunteers, or positively influence a campaign in some other way.
7. Mason and Compass work together to categorize and prioritize interview candidates.
8. Compass creates a gifts chart (pyramid) for the fundraising goal that is tested in the Feasibility Study. This chart will reflect proportionate giving patterns experienced in successful fundraising efforts at similar institutions.

GEORGE MASON UNIVERSITY-COMPASS COLLABORATION

1. Mason dedicates staff time to secure and schedule interviews and promptly thank participants.
2. Mason provides background information on each interviewee and a clear understanding of the relationship/interests that exists between the individual and the proposed plans and objectives of the University.
3. Compass conducts the set number of interviews on the agreed timeline. Confidential interviews may be conducted in-person, but more likely by video conference or by phone, depending on accessibility.
4. Compass provides immediate feedback on critical issues uncovered during interviews.
5. Compass collates and analyzes interview data and compiles a series of observations and recommendations to aid Mason in campaign planning and execution.

Compass views a Feasibility Study interview as an opportunity to provide early education and cultivation for Mason's constituents. Compass works on Mason's behalf to promote awareness and encourage

interest in the partnership and the future campaign. Interviews are typically scheduled over a four- to six-week period to allow for greater flexibility in securing meetings with Feasibility Study participants.

In preparation for the Feasibility Study interview, Compass team members work in collaboration with University's leadership and staff to thoroughly understand the mission, vision for the future, and the strategic funding priorities where philanthropic partnership is desired. In addition, Compass team members verse themselves with specific information about each interviewee which is provided by Mason on a *Feasibility Study Participant Profile* (template provided by Compass and completed by Mason).

Compass will develop a list of 12 to 15 standard questions and discussion topics, as well as additional questions specific to George Mason University, to elicit responses used later to analyze in collective forms of quantitative and qualitative data. While the average duration of an interview is 45 minutes, ideally Feasibility Study participants are asked to reserve a full hour. *Note: while each interview facilitates discussion about philanthropic considerations and/or intentions of the Feasibility Study participant, it is not marketed or intended as a direct solicitation for the campaign.*

FEASIBILITY STUDY REPORT

Presentation of the Feasibility Study Report is designed to be interactive to ensure clarity. As such, presentation may include one or more of the following steps:

- **LEADERSHIP BRIEFING** - The full report including detailed statistics, analysis, observations, and recommendations is presented in draft form to select University leaders. This briefing typically includes the University President and Advancement senior leadership. Feedback received during this briefing will be appropriately incorporated into the draft for the initial presentation.
- **INITIAL PRESENTATION** - The full report including detailed statistics, analysis, observations, and recommendations is presented in draft form and explained to a broader committee of University leaders, staff, and volunteers. This informal environment allows for questions and issues to be addressed prior to presenting the final report.
- **FINAL PRESENTATION** - The final report is presented in a more formal workshop setting to a larger group, which typically includes the University and Foundation Boards. The results are presented and the role of the board in creating a positive climate for campaign success is discussed.

CAMPAIGN COUNSEL

DEVELOPING A CAMPAIGN PLAN

With over 100 years of successful experience in fundraising, Compass professionals will work with University Leadership, Central Advancement, and volunteer leaders to create a campaign plan based on successful strategies and tailored for specifically for Mason.

We know the best practices in the industry and what it takes to execute a campaign successfully. We understand that part of our role as counsel is to instill the discipline necessary for the campaign to stay on track. We know Mason will have high expectations for our service and we will be accountable for meeting those expectations.

In return, we will provide proven strategies for campaign success and will hold the University's staff and volunteers accountable for implementing them along mutually determined timelines.

As informed by the outcomes of the Readiness Assessment, the creation of a campaign plan is essential to campaign success and will serve as a roadmap for organizing volunteer leadership, implementing best practice, prioritizing and scheduling tasks and activities, and attracting significant philanthropic support. It is a resource for board members, volunteers, and staff as they familiarize themselves with the fundraising concepts and strategies that are critical to campaign success. This plan may include the following:

- Overview
- Strategy
- Implementation
- Timeline
- Organization
- Leadership
- Orientation and Training
- Peer Assessment
- Cultivation
- Communications
- Budget
- Stewardship
- Counting & Reporting

This plan divides these tasks and activities into manageable components that are ordered sequentially to build momentum toward campaign success. A campaign plan may need to be revised to take advantage of emerging opportunities and/or accommodate unexpected diversions and is designed to be a dynamic document that evolves as the campaign evolves:

Effective campaign implementation requires the accomplishment of a number of tasks and activities concurrently.



A strong plan incorporates and reflects the unique nature of Mason and consists of a series of action items within the context of the four *Predictive Indicators for Success*:

- **A CASE FOR SUPPORT** that is urgent and compelling
- **PHILANTHROPIC POTENTIAL** to secure contributions
- **DEDICATED LEADERS** – both volunteer and staff – to motivate and influence participation
- **STRATEGIC RESOURCE INVESTMENT** to ensure effective and efficient fundraising

AN URGENT & COMPELLING CASE FOR SUPPORT

Feedback received directly from Feasibility Study participants regarding the effectiveness and marketability of the *Preliminary Case Statement* is used to strengthen the content which subsequently becomes the foundation for producing campaign collateral materials during the preparation phase. Feedback from the Feasibility Study also provides Mason options for planning and implementing the campaign in phases depending on how interviewees rank multiple funding priorities. **A Smart Campaign approach encourages Mason to use data collected during the Feasibility Study to jumpstart design and production of campaign collateral materials before the next academic year begins.**



Campaign Communications

Effective communications will be a cornerstone of both the campaign cultivation and stewardship programs. The campaign will require a communications plan designed to integrate appropriately with ongoing University communications and with the following people-oriented objectives in mind:

- Inform current and potential donors to the University that an urgent need exists and that plans have been made to meet the need.
- Inspire current and potential donors to support the plan.
- Keep leaders, volunteers, donors, and University staff up to date on campaign progress and activities.
- Recognize donors to the campaign.
- Celebrate the impact of campaign gifts to a priority.

The following aspects will be considered in developing the campaign communications plan:

- **SCOPE** – Campaign communication needs evolve throughout the campaign. During the lead/major gift phase, the tools and materials developed are focused on securing gifts from a relatively small number of high-level donors. During the public phase, tools and materials will be developed to reach the broadest number of University constituents.
- **SUITE OF MATERIALS** – A comprehensive suite of both print and digital materials support the campaign throughout its phases. Publications and platforms for consideration to showcase the campaign and its fundraising initiatives include:
 - Case for Support
 - *Mason Spirit* alumni magazine – special campaign section
 - George Mason University website and Advancement pages
 - One-pagers on campaign priorities
 - Campaign newsletter
 - Alumni correspondence (emails, news feeds, etc.)
 - Speaking points for University leaders and campaign volunteers
 - Campaign video and/or multimedia communication
 - Social media
- **TIMING** – Proper timing is important in the campaign communications plan. While many of the written materials will be produced early in the campaign, developing new content as the campaign progresses and ensuring the communications plan and cultivation program are well integrated and updated through the life of the campaign are critical components.
- **COMMITTEE** – To ensure effective development and implementation of the campaign communications plan, a Communications Committee may be recommended as a non-soliciting committee of the campaign.
- **MEDIA ACTIVITY** – News releases, television news opportunities, and radio and TV promotional spots should be considered.
- **PRESENTATION OPPORTUNITIES** – Opportunities to make personal presentations, by campaign leadership, to appropriate constituency groups should be planned.
- **APPROVALS** – The final approval process for all campaign communication initiatives, tools, and materials will be determined. No materials should be finalized until both copy and format have been approved for accuracy, effect, and interpretation.

PHILANTHROPIC POTENTIAL

In addition to discussing potential philanthropic investment in the campaign, each interview Study participant is asked to identify sources of support Mason might access as it launches a campaign. This information is used collectively to revise the gifts chart, account for lead gift prospects, and determine availability of initial support at the onset of the fundraising effort. Self-identified gifts and suggested lead gifts from Study participants tend to be the first commitments secured at the end of the preparation phase of the campaign or the beginning of the lead/major donor phase of the campaign.

A Smart Campaign approach encourages Mason to prioritize Study participants for immediate and/or continued cultivation with intentions to secure philanthropic commitments as soon as possible.



The Gifts Chart

Upon the approval of a campaign goal Compass will develop a gifts chart that provides an aspirational depiction of the size and number of gifts needed to meet that goal. This gifts chart will provide benchmarks against which progress can be tracked and will provide insight into potential based on analysis of results in relation to those benchmarks. This will provide details necessary to refine planning parameters—including gift ranges and donor to prospect ratios—critical for campaign success. Ongoing recalibration in relation to the gifts chart will ensure campaign success.

Identifying, Qualifying & Soliciting Campaign Prospects

Compass takes a highly customized approach to developing strategies for identification, qualification, and solicitation of prospects. This work is initiated in the first six to 12 months of campaign planning and incorporated into the Readiness Assessment and Feasibility Study. Mason can expect to benefit from three key strategic approaches:

Artificial Intelligence (prospect research)

If a wealth screening has not been completed in the last 24 months, Mason may want to consider conducting a screening that can aid in assessing the philanthropic potential relative to the proposed campaign. Results of the computer-generated screening will aid in prioritizing and elevating high-capacity prospects, allowing the Advancement Team to focus time and resources on higher probability opportunities. Compass may also recommend investing in the composition of donor research profiles for top prospects uncovered where the University does not already have access to these individuals. *Note: prospect research capacity of the Advancement Office will be assessed during the Readiness Assessment.*

Human Intelligence (peer screening)

The use of volunteers to collect critical intelligence about prospects remains an effective tool for strategy development, especially in campaigns. First, it allows Central Advancement to engage Board members and volunteer leaders in exercises that inform them about campaign strategies and raises their own sights for giving at higher levels. Second, through the process, volunteers tend to contribute directly to developing solicitation strategies and often avail themselves to approach and solicit prospect on behalf of the University. Peer screening is conducted in small groups of two to three well-informed volunteers where select lists of prospects are reviewed

against a chart that delineates the numbers and levels of gifts needed to be successful in the fundraising effort.

Compass Intelligence (our experience)

While Compass has a national scope, the firm is headquartered in Virginia and 80 percent of the team resides in the Maryland-DC-Virginia region. As such, Compass consultants have worked, led, and completed a multitude of multimillion-dollar campaigns with the Commonwealth's philanthropists at the center. This knowledge and experience are offered to Mason in the process of developing strategies for identifying, qualifying, and soliciting individual, corporate, and foundation major gift prospects.

Implementing a Robust Donor Relations & Stewardship Program

Building from the findings of the Readiness Assessment, Compass will partner with the University to complement existing donor relations and stewardship strategies with activities designed to specifically support the campaign. As an integral part of the fundraising cycle, these activities will be developed as follows:

Cultivation Program

The appropriate and timely cultivation of Mason's constituency is a crucial step in the successful solicitation of the prospect pool. Dedicating the time to create and implement an effective cultivation program allows the University to engage and educate constituents, encourage active participation in the campaign, and develop stronger relationships. An effective cultivation program often includes the following goals:

- Provide opportunities for constituents to express attitudes and perceptions about the University, the vision for the future and the campaign.
- Engage individuals who might consider a position of leadership in the campaign volunteer organization.
- Build ownership among the constituency by encouraging participation in shaping and molding plans and programs.
- Create a climate for leadership and giving, ultimately preparing the constituency to invest in the campaign at the appropriate time.

A variety of activities will be evaluated for inclusion in the campaign cultivation program. Emphasis is placed on those activities proven to motivate giving at the highest levels, including:

FACE-TO-FACE MEETINGS – One or more face-to-face meetings may be necessary to cultivate a principal or leadership gift prospect prior to solicitation of a campaign commitment. Ensuring fundraising team participants are briefed on the goals and objectives of the meeting and trained to achieve those goals and objectives is essential.

SMALL GROUP MEETINGS – Convening "like" potential prospects, either by location, professional/personal interests, or through the invitation of common acquaintances, is often an effective way to disseminate information about the Case Statement and generate excitement for the campaign.

SPECIAL EVENTS – Special events, such as cocktail receptions or a lecture series, can prove very effective in reaching a larger number of prospects at one time and identifying those with strong interests in the organization. The health climate in the US, and any restrictions that might still be in effect, will be factored into this strategy.

Stewardship Program

A critical part of any campaign is the appropriate stewardship of campaign donors and volunteers. A comprehensive stewardship plan will be developed early in campaign implementation and will include:

- **ACKNOWLEDGEMENT** - A gift acknowledgment strategy ensures campaign donors are appropriately thanked for their commitment in an accurate and timely manner. This strategy also ensures donors receive confirmation of receipt and the necessary tax documentation for all gifts. This strategy may include a plan to provide donors at various levels campaign specific acknowledgment letters and hand-written notes from campaign volunteers, board members and/or University Leaders.
- **APPRECIATION** - An appreciation strategy that details the criteria for providing campaign donors and volunteers with signature gifts of appreciation for their donation of resources (time, talent, and philanthropic gifts) will be created. Gifts of appreciation may include high-level branded items created specifically for the campaign or more personal items specific to the donor.
- **RECOGNITION** - A recognition strategy details the ways in which campaign donors and volunteers are publicly recognized for their support. Donor recognition may include naming opportunities, press releases, newsletter announcements, donor profiles in publications, and/or listings in electronic and print honor rolls.
- **IMPACT** – The final element of the overall stewardship program is a reporting strategy that provides donors with specific updates on the impact of their contributions during and after the campaign.

In addition, stewardship specific initiatives will be recommended for inclusion in both individual fundraising strategies and events to celebrate campaign progress/success.

DEDICATED LEADERSHIP

A significant number of current and potential volunteer leaders will be encouraged to participate in the Feasibility Study. In addition, interview participants will be asked about their willingness to volunteer in the campaign for Mason, and these responses inform options for campaign leadership, structure, and the bandwidth necessary to reach pools of identified donor prospects. Those who self-identify as willing campaign volunteers tend to be first considered for leadership roles and/or for hosting cultivation events in the earlier phases of the campaign. **A Smart**

Campaign approach encourages Mason to transition select study participants for the Campaign Steering Committee and begin training and orientation of volunteer leaders even before the end of the Preparation Phase.



Building a Campaign Volunteer Structure

The Feasibility Study will help clarify specific needs and opportunities for volunteers in the campaign. With this information Compass will collaborate with Mason to:

- Build an appropriate volunteer structure
- Determine volunteer roles and responsibilities
- Identify the number of volunteers needed
- Develop plans for Identifying, qualifying, cultivating, enlisting, utilizing, evaluating, and stewarding volunteers
- Initiate the engagement of the highest-level campaign volunteers

Supporting Advancement Leadership

Preparing, launching, and sustaining a comprehensive campaign is work that goes above and beyond the year-to-year activity of securing resources through annual and alumni giving. Compass brings decades of experience managing campaigns and will support Central Advancement by providing structure, guidance, efficiencies, and professionalism to maneuver effectively in a competitive philanthropic market. Compass fills the gaps in the following ways in partnership with our clients:

- **EXPANDED KNOWLEDGE BASE** – Compass recognizes that fundraising programs are part of larger Advancement systems within the University. A recommendation or change in programming has an impact on other efforts and individuals associated with the team. Compass not only supports the efforts of Central Advancement on campaign initiatives but also provides counsel to all other related fundraising programs and professionals. This holistic approach allows the consultants to co-exist in Advancement, appreciate institutional cultures, and perpetuate inclusivity among the entire Advancement Team. Compass values professional development and recognizes that investing in the human capital of Mason and its relationships is key to building capacity!
- **INCREASED CAPACITY** – Coordinating the implementation of a campaign plan is time consuming. It involves multiple offices, departments, and volunteer committees working together. Compass becomes the keeper of the campaign plan – drafting and implementing this multi-layered document for all to follow and creating a clear understanding among stakeholders of specific roles and responsibilities. Compass uses the campaign plan to outline fundraising processes, introduce policies, provide volunteer structures, propose meeting schedules, share job descriptions, and maintain order in a complex system. Overseeing the campaign plan provides much-needed support for the Vice President for Advancement and Advancement senior leadership to focus on everyday routines while campaign activity stays on track.
- **DISCIPLINE AND ACCOUNTABILITY** – Compass supports Advancement Teams by encouraging attentiveness towards campaign duties, holding individuals accountable, and playing a key role in managing across, up, and down hierarchical organizational charts.

The mission of Compass is to build capacity of our clients to raise more money every day—this means designing a campaign plan that builds on existing fundraising programs, staff skill sets and talents, and philanthropic culture.

Supporting Mason Leadership

As with all higher education campaigns, the University President, senior leadership, and academic leadership will be highly attractive to donor prospects because of their status within the institution and/or expertise connected directly to funding priorities. These leaders bring credibility to strategic initiatives and can:

- Help qualify donor prospects, connecting their (academic) interests in supporting the institution with the funding priorities in the strategic plan.
- Serve as spokespersons for specific projects and programs that advance curriculum development and strengthen the education of Mason students.
- Accompany Central Advancement Leadership when approaching, cultivating, and soliciting top donor prospects.
- Provide critical information to complete updates, assessments, and progress reports for purposes of donor stewardship and administering of gifts during and after pledge fulfillment periods.

Recognizing the competition for the time of University leaders, Compass works with Advancement to manage the use of these leaders efficiently, providing timelines of anticipated engagement, structure for information needed, and talking points for meetings and presentations.

Supporting Campaign Leadership

The success of Mason’s campaign depends on the active participation of board members and campaign volunteers. Their efforts are required in the identification, qualification, cultivation, solicitation and stewardship of prospects and donors. Compass serves as mentor and coach—ensuring the campaign experience is positive, reflects well on Mason, and results in goal achievement. Training volunteers to work as a cohesive team along with staff is a vital component of any campaign. Compass has developed a series of signature workshops that will be tailored for Mason and offered—on an ongoing basis—for staff, board members, and campaign volunteers throughout campaign service:



MAKING IT HAPPEN – CAMPAIGN 101

This multi-phased training program will focus on building teams and shared responsibility in a fundraising campaign. Working together on a common goal is the focus of these sessions to create a sustainable development system.



MESSAGING

The goal for this workshop is to ensure that everyone associated with the campaign talks with “one voice” about the organization, campaign goals, and objectives. This interactive workshop will engage staff, board, and volunteers on how to deliver messages to varying constituencies in a personal, forthright manner.



THE PERFECT ASK

This interactive, participatory workshop explores strategies for face-to-face solicitations. Using collaboration and participatory exercises, staff, and volunteers will understand why donors are motivated to give and how to tailor an approach that is personal and respectful of the donor. Workshop participants are provided with tools and strategies that make the process both comfortable and successful.

STRATEGIC RESOURCE INVESTMENT

During the first 6 to 9 months of the planning phase of the campaign, while Compass works with Mason to complete the Readiness Assessment and Feasibility Study, significant information will be revealed that will allow for a thorough assessment of its capacity to be successful in a comprehensive campaign. In response to the needs identified in the assessment process, organizations are often quick to allocate campaign-specific resources for planning, preparation, and early implementation. However, it will be critical to develop a full budget, prior to campaign implementation, that will be administered over the multi-year campaign timeframe. Ensuring adequate resources to fully support the campaign is essential and should include allocations for development professionals, staffing structure, database/technology support, prospect research, campaign policies and procedures, etc. **A Smart Campaign approach encourages Mason to designate resources for advancement operations, ensuring the university builds capacity before the campaign is initiated.**



Setting Campaign Counting Policies

Detailed counting guidelines are necessary to ensure consistency in how progress toward achievement of the campaign goal will be tracked and reported. These guidelines will be evaluated in the context of existing University gift acceptance policies and procedures, industry guidelines for counting and reporting, and relevant regulatory and legal guidelines and restrictions (GASB and UPMIFA).

Campaign counting guidelines should be clearly understood by all board members, campaign volunteers, and appropriate University staff, and will be reviewed to ensure they address the following:

- Key principles of campaign counting
- Definition of a campaign
- Distinctions between counting, valuing, and crediting
- Campaign reporting period and scope
- Campaign gift recording categories
- Fundamental principles of campaign counting
 - Basic principles
 - What gifts will be reported
 - When gifts will be reported
 - Pledge payment period
 - Reporting maturations of previous commitments
- Specific definitions and reporting guidelines for each gift category
 - Outright gifts
 - Irrevocable deferred gifts
 - Revocable deferred gifts
- Gifts that may be counted in more than one category
- Gifts that change character during a campaign period

Tracking & Reporting Campaign Progress

Once campaign counting guidelines are finalized, a standardized reporting process for the campaign is created. This process requires effective implementation and administration of the fundraising database system and reporting standards that include:

- Overall campaign progress
- Campaign prospect management
- Timelines and schedules
- Distribution lists
- Guidelines for ad-hoc report requests

Clarifying these details and standardizing reporting activities early in campaign implementation ensures consistency moving forward and provides the details necessary for accurately tracking campaign progress.

PROPOSED PRICING

To ensure success, Smart Campaign service to George Mason University includes:

- Throughout service, the assigned team will be available for regularly scheduled video conference or telephone calls weekly or bi-weekly. Robert Bull, President, will be available to join calls upon request.
- During the Readiness Assessment, the assigned team will conduct up to 20 one-hour interviews; and will meet with staff and volunteers regularly throughout the Readiness Assessment, including to present the Readiness Assessment Preparation Guide, identify interview candidates, and organize interview scheduling.
- During the Feasibility Study, the assigned team will conduct up to 50 one-hour interviews; and will meet with staff and volunteers regularly throughout the Feasibility Study, including to present the Feasibility Study Preparation Guide, assist in preliminary case development, identify interview candidates, and organize interview scheduling.
- At the discretion of the Lead Consultant, Compass will be available for on-site visits throughout the duration of service.
- Mason will have unlimited access to the Compass Team via telephone, videoconference, and email.
- Mason will also have access to subject experts to provide counsel on communications, database management, and research, at the discretion of the Lead Consultant.

The total for 24 months of Smart Campaign service is provided at a discounted fee of \$2,277,000, including planned renewal of capacity building for Central Advancement and current board assessment services for GMUF.

Service	Total Service Fee	Monthly Fee for Jan. 22 - Jun. 22 (First 6 Months)	Monthly Fee for Jul. 22 - Dec. 23 (Following 18 Months)
Renewed Fundraising Counsel	\$285,000	\$47,500	\$ -
Current GMUF Board Assessment	\$72,000	\$12,000	\$ -
Readiness Assessment	\$135,000 \$105,000	\$22,500 \$17,500	\$ -
Feasibility Study	\$135,000 \$105,000	\$22,500 \$17,500	\$ -
Campaign Counsel	\$1,890,000 \$1,710,000	\$ -	\$105,000 \$95,000
Total Monthly	\$2,517,000 \$2,277,000	\$104,500 \$94,500	\$105,000 \$95,000

This fee includes all expenses for the Compass team for the duration of the agreement, including subject experts to be engaged at the discretion of the lead consultant. Additional work outside of the scope described in this proposal that exceeds more than 90 days will be deemed a long-term project; and in which case, Mason and Compass will make necessary adjustments to the agreement.

For a campaign goal of greater than \$500 million, this fee represents an efficient cost per dollar raised ratio of less than half a cent.

Implementing this campaign will require Mason to make an initial investment from current resources. Mason should plan to utilize campaign funds to “reimburse itself” for this initial investment. We recommend that Mason create a separate budget for campaign expenses, which include costs such as staffing, printing, meetings, events, mailings, travel, supplies, additional clerical help, prospect research, donor recognition and audio-visual materials.

All Compass contracts have a 30-day escape clause. Should Compass or Mason wish to terminate or adjust service prior to the end of the contract, either may do so without any further financial obligation.

At the commencement of service, the Compass team will meet with University’s leadership to establish written expectations for performance. Both organizations will also agree on procedures to review and manage achievements throughout the length of the agreement. The tasks outlined in this proposal form the basis of these expectations.

Option #3: Net 30 Payment Terms per the RFP is Compass’ preferred payment method.

REFERENCES

Client	Length of Service	Contact	Contact Number	Contact Email
Accion Opportunity Fund 111 West Saint John Street, Ste 800 San Jose, CA 95113	2 years	Gina Harman Chief Strategy Officer and VP for Development	(408) 297-0204	gharman@accion.org
Antioch University 40 Avon St Keene, NH 03431	2 years	Laura Andrews Director of Institutional Advancement	(603) 283-2131	landrews@antioch.edu
George Mason University 4400 University Drive MS 1A3 Fairfax, VA 22030	2 years	Trishana E. Bowden President, George Mason University Foundation	(703) 993-8756	tbowden2@gmu.edu
National Museum of African American History & Culture, Smithsonian Institution 1400 Constitution Ave NW Washington, DC 20560	3 years	Deborah L. Mack, PhD Interim Director of the National Museum of African Art	(202) 633-4513	mackdlynn@si.edu
National Trust for Historic Preservation 2600 Virginia Ave NW #1100 Washington, DC 20037	11 years	Brent Leggs Executive Director, African American Cultural Heritage Action Fund	(202) 588-6185	bleggs@savingplaces.org
NOVA Foundation 4001 Wakefield Chapel Rd Annandale, VA 22003	2 years	Kelly Persons Executive Director	(336) 830-5408	kpersons@nvcc.edu
Olivet College 320 S Main St Olivet, MI 49076	9 years	Steven Corey President	(269) 749-7642	scorey@olivetcollege.edu

APPENDICES

COMPASS IN GOOD STANDING

Neither the Compass Group nor its subcontractors are currently involved in litigation with any party.

Neither the Compass Group nor its subcontractors have been under any investigation or action from any state, local, federal, or other regulatory body related to the firm or any subcontractor in the last three years.

Neither the Compass Group nor its subcontractors have been involved in any lawsuits in the last three years.

RECENT CLIENTS

The Compass Group has served over 150 clients since our founding in 1993, raising more than \$2 billion in philanthropic gifts. Below is a selection of recent clients in education.

Antioch College

Antioch University

Aspen Education Foundation

The Awty International School

Bozeman Schools Foundation

Burgundy Farm Country Day School

Clark Atlanta University

College of the Atlantic

Colorado Rocky Mountain School

Colorado Springs School, The

Episcopal School of Acadiana

The Fay School

Florida A&M University

Georgetown Visitation Preparatory School

Germantown Education Foundation

Green Hedges School

Independent School Chairpersons Association

Jackson State University

Kamehameha Schools

KIPP New Jersey

Landon School

The Langley School

Mount St. Mary's University

McGillis School

National Outdoor Leadership School

Norwood School

NOVA Foundation

Olivet College

Our Lady of Good Counsel High School

Oxford School Board

Rio Grande School

Saint Andrew's School

Sandy Spring Friends School

Santa Fe Preparatory School

St. Louis Catholic School

The Stanwich School

Telluride Mountain School

Teton Science Schools

Texas Southern University

Tuskegee University

United World College USA

Ursuline Academy of Dallas

Washington Jesuit Academy

Whitby School

Woodland Presbyterian Church and School

The Woods Academy

See a full list of recent Compass clients in education [online](#).

TEAM BIOGRAPHIES

ROBERT BULL

President

Robert Bull serves as president of The Compass Group, guiding the company's exceptional consulting services while driving Compass' strategic growth and development. Robert is a positive change agent, taking a values-driven approach to the evolving world of philanthropy and the mission-based institutions for which Compass engages.

Robert's career spans more than two decades of fundraising consultation resulting in nearly \$2 billion in philanthropic gifts across the sectors of conservation, education, healthcare, and arts. His experience includes six years with the national consulting firm Ketchum, Inc. where Robert honed his professional fundraising skills of campaign planning and management; major gift strategy development and solicitation; special events management; and volunteer leadership recruitment and development.

Robert's resume includes two stints as an in-house fundraiser. He began his career in the advancement office of Washington College where he spent several years collaborating with volunteers, exceeding development goals, and gaining expertise in higher education. Later in his career, Robert joined the National Trust for Historic Preservation as chief development officer, spearheading multimillion-dollar fundraising efforts and facilitating operational excellence.

In addition to his role as a seasoned fundraiser and consultant, Robert is an educator, teaching individuals and institutions next-level success through his dynamic speaking, presenting, and lecturing in the classroom and beyond. He also serves as a trustee at his alma mater Goucher College and is currently co-chairing the College's \$100 million Undaunted campaign. He is a former president of the Alumnae/i Association of Goucher College and former chair of The Greater Goucher Fund.

Robert holds a Master of Science degree in Organizational Leadership and Management from Antioch University New England and a Bachelor of Arts degree in Theatre and Arts Administration from Goucher College. He has completed coursework at Antioch University in pursuit of his doctoral degree within the Graduate School of Leadership and Change.



DENA PATTERSON

Vice President, as Lead Consultant

Dena Patterson brings to Compass a deep dedication to – and knowledge of – fundraising for higher education institutions. Before transitioning to consulting, Dena spent almost two decades in various advancement roles for universities and colleges, ensuring effective multimillion-dollar fundraising cycles and successful campaigns across diverse and varied constituencies.



Most recently, Dena served as Principal Gifts Officer for Wellesley College where she served as a lead fundraiser, managing a prospect pool of 150+ and the College's Science Center Campaign. Prior to Wellesley, Dena oversaw campaign strategy and implementation for the United States Naval Academy Foundation. As Campaign Director and Assistant Secretary to the Board of Directors, Dena drove the goal setting, communications, and leadership volunteer training which resulted in the meeting – and exceeding – of a \$400 million goal 18 months ahead of campaign schedule. Dena joined the Naval Academy Foundation from Loyola University Maryland where she spent seven years, most recently as Director of Development for Loyola College of Arts and Sciences and the School of Education. Dena's higher education career began at Monmouth University, where she supported both admissions and athletics before transitioning her focus to philanthropy.

Dena's commitment to fundraising for education extends into her volunteer experience. She currently serves on the Board of Directors and Development Committee for an independent school and completed tenures on the Bucknell University Alumni Association Board of Directors, as well as three terms on the Bucknell University Reunion Fundraising Committee.

A first-generation college student, Dena holds two graduate degrees: a Master of Arts in Liberal Studies from Loyola University and a Master of Science in Business Administration from Monmouth University. She also earned a Bachelor of Science in Business Administration from Bucknell University.

DAVID COOPER

Vice President

David Cooper has held nonprofit leadership roles for more than 30 years, generating more than \$500 million for the organizations he has served. He specializes in principal and major gift philanthropy and attributes much of his fundraising success to effective prospect development and management. David has brought his expertise in achieving challenging goals and objectives across various industries including higher education, environmental and conservation, and human services.



Prior to joining The Compass Group, David served as vice president of individual giving for the National Recreation and Park Association. In this role, he created a successful individual giving program from the ground up. He has also held senior development positions with multimillion fundraising goals at prestigious institutions including the Gettysburg Foundation, National Trust for Historic Preservation, Land Trust Alliance, and George Mason University.

David holds a Master of Divinity degree from Southeastern Baptist Theological Seminary and a Bachelor of Science degree from Campbell University.

KELLY ROLLISON

Vice President



Before joining The Compass Group, Kelly Rollison served as the senior director of advancement services for the United States Naval Academy Foundation in Annapolis, Maryland. As an integral team member, Kelly helped the Foundation surpass its \$400 million campaign goal. During her tenure, she also developed a robust prospect identification tracking system and pipeline for annual, major, principal, and planned giving prospects; spearheaded new prospect modeling and data analytics programs; and established a comprehensive donor relations and stewardship program. Thanks to her operations acumen, Kelly also led a complex database conversion, streamlined processes in gift and records management, and created a comprehensive set of metrics and key indicators to track all facets of fundraising performance.

Prior to her role with the Naval Academy Foundation, Kelly served as the director of individual giving and development chief of staff at the Land Trust Alliance in Washington, DC. Her responsibilities included driving growth in all areas of the individual giving program through strategy and execution of plans for cultivation, gift solicitation, and stewardship. Kelly also assisted with Board relations and the development and launch of the Alliance's first-ever \$35 million capital campaign.

Kelly's resume also includes the American Alliance of Museums where she helped build the infrastructure for their development team and managed the feasibility study for the Alliance's first campaign; the development office of American University's Washington College of Law; and the George Mason Regent's Fellowship at Gunston Hall Plantation. Kelly recently completed a four-year term on the Naval Academy Primary School's Board of Trustees, where she served as Vice Chairman.

Kelly earned a Master of Arts degree in Early American History from George Mason University and a Bachelor of Arts degree from American University, double majoring in International Economic Policy and Public History.

EMILY FABIAN

Senior Consultant

Emily Fabian has specialized in major gift fundraising, annual giving, and board relations for over a decade.

Prior to joining The Compass Group, Emily served as a Philanthropy Executive for the Australian Conservation Foundation, an environmental advocacy organization with over half a million members. Emily managed a portfolio of major donors and prospects, including trusts and foundations.



Before moving to Melbourne, Australia, Emily worked with World Wildlife Fund in Washington D.C., developing high-touch cultivation techniques to build and deepen relationships with donors. Through this stewardship, Emily successfully engaged annual fund constituents and developed a robust pipeline of major gift prospects. Her fundraising career began at the National Trust for Historic Preservation, managing the engagement and stewardship of the organization's most prominent donors and board members during the organization's multimillion-dollar campaign.

Emily's experience also includes serving as a fundraising subcommittee member for Climate for Change and community work to facilitate values-based conversations around climate change and additional important environmental issues.

Emily graduated from James Madison University with a bachelor's degree in International Business and Spanish.

ATTACHMENT A
SMALL BUSINESS SUBCONTRACTING PLAN
TO BE COMPLETED BY OFFEROR

Offerors must advise any portion of this contract that will be subcontracted. It is the goal of the Commonwealth that over 42% of its purchases be made from small businesses. All potential offerors are required to include this document with their proposal in order to be considered responsive.

Small Business: "Small business (including micro)" means a business which holds a certification as such by the Virginia Department of Small Business and Supplier Diversity (DSBSD) on the due date and time for proposals. This shall also include DSBSD certified women- owned and minority-owned businesses and businesses with DSBSD service disabled veteran owned status when they also hold a DSBSD certification as a small business on the proposal due date. Currently, DSBSD offers small business certification and micro business designation to firms that qualify.

Certification applications are available through DSBSD online at www.SBSD.virginia.gov (Customer Service).

Offeror Name: The Compass Group, Inc

Preparer Name: Robert Bull **Date:** 11/17/2021

Who will be doing the work: ☐ I plan to use subcontractors ☒ I plan to complete all work

Instructions

- A. If you are certified by the DSBSD as a micro/small business, complete Section A of this form.
- B. If the "I plan to use subcontractors" box is checked, complete Section B of this form. For the proposal to be considered and the offeror to be declared responsive, the offeror shall identify the portions of the contract that will be subcontracted to any subcontractor, to include DSBSD certified small business for the initial contract period in relation to the offeror's total price for the initial contract period in Section B.

Section A

If your firm is certified by the DSBSD provide your certification number and the date of certification.

Certification Number: 814907 Certification Date: July 31, 2020

Section B

If the "I plan to use subcontractors" box is checked, populate the requested information below, per subcontractor to show your firm's plans for utilization of any subcontractor, to include DSBSD-certified small businesses, in the performance of this contract for the initial contract period in relation to the offeror's total price for the initial contract period. Certified small businesses include but are not limited to DSBSD-certified women-owned and minority-owned businesses and businesses with DSBSD service disabled veteran-owned status that have also received the DSBSD small business certification. Include plans to utilize small businesses as part of joint ventures, partnerships, subcontractors, suppliers, etc. It is important to note that these proposed participation will be incorporated into the subsequent contract and will be a requirement of the contract. Failure to obtain the proposed participation dollar value or percentages may result in breach of the contract.

Plans for Utilization of Any subcontractor, to include DSBSD-Certified Small Businesses, for this Procurement

Subcontract #1

Company Name: _____ SBSD Cert #: _____
Contact Name: _____ SBSD Certification: _____
Contact Phone: _____ Contact Email: _____
Value % or \$ (Initial Term): _____ Contact Address: _____
Description of Work: _____

Subcontract #2

Company Name: _____ SBSD Cert #: _____
Contact Name: _____ SBSD Certification: _____
Contact Phone: _____ Contact Email: _____
Value % or \$ (Initial Term): _____ Contact Address: _____
Description of Work: _____

Subcontract #3

Company Name: _____ SBSD Cert #: _____
Contact Name: _____ SBSD Certification: _____
Contact Phone: _____ Contact Email: _____
Value % or \$ (Initial Term): _____ Contact Address: _____
Description of Work: _____

Subcontract #4

Company Name: _____ SBSD Cert #: _____
Contact Name: _____ SBSD Certification: _____
Contact Phone: _____ Contact Email: _____
Value % or \$ (Initial Term): _____ Contact Address: _____
Description of Work: _____

Subcontract #5

Company Name: _____ SBSD Cert #: _____
Contact Name: _____ SBSD Certification: _____
Contact Phone: _____ Contact Email: _____
Value % or \$ (Initial Term): _____ Contact Address: _____
Description of Work: _____