

December 22, 2021

Erin Rauch, Assistant Director  
George Mason University  
Purchasing Department  
4400 University Drive, Mailstop 3C5  
Fairfax, VA 22030

Dear Ms. Rauch,

Marts&Lundy is pleased to offer the following responses to Mason's request for negotiations/clarifications regarding our proposal for *Comprehensive Campaign Counsel*.

1. Mason is an educational institution and entity of the Commonwealth of Virginia. As such, we are obligated to ensure that all pricing and contractual elements meet our institution's needs. Mason is also a VASCUPP member and requests pricing to match or beat other VASCUPP contract pricing. The JMU contract, UCPJMU4042, appears to have a monthly retainer fee of \$1,500 vs the \$3,000 offered to Mason. With that in mind, please provide your best pricing for all services outlined in your proposal.

The retainer in the JMU contract covers the services of one contractor consultant, whereas the retainer for George Mason covers a senior consultant, a consultant, and an associate consultant who are all full-time employees of Marts&Lundy. That being said, we understand the importance of price equity within VASCUPP and are prepared to lower our monthly retainer for our team of three to \$2,000. All of the project fees in our proposal are based on our 2021 sliding fee scale for mid- to large-sized universities and represent our best pricing for these projects.

2. If awarded a contract, do you agree that invoices will be paid Net 30 after services rendered/goods received. Progress payments for services rendered are also acceptable. Note that invoices must be received in Mason's Accounts Payable inbox, [acctpay@gmu.edu](mailto:acctpay@gmu.edu), and must reference a Mason purchase order number to be considered valid.

We agree.

3. Can you outline the number of clients that the assigned team would carry during the 3 phases of service?

Given the length of the proposed engagement, at this time Marts&Lundy cannot accurately predict the number of clients each team member would serve during each phase. In our experience, typically a senior consultant would manage three to five projects of this size at one time, with key components of the projects staged to ensure ample availability to each client. Consultants typically manage two to three projects of this size, and associate consultants project manage up to three complex projects at any given time. Consulting

partners work on only one Marts&Lundy project at a time. Our analysts, who have a brief period of involvement in these projects, may work on five to seven projects at once.

4. If awarded a contract, could a condensed implementation timeline be presented?

Yes. If awarded this contract, one of Marts&Lundy's first steps would be to discuss the schedule and timing of the scope of work that best fit Mason's situation. We would develop a project timeline to correspond with key milestones identified by Mason, such as board meetings, donor events, and campus schedules, and to meet Mason's preferred completion date. We would refine this in collaboration with the Mason team, including identifying each team's responsibilities and the dates by which each responsibility must be completed in order to stay on schedule throughout the project.

5. Confirm your understanding that all travel expenses will only be reimbursed in accordance with the Commonwealth of Virginia's per diem rates and Mason's travel policies. <http://fiscal.gmu.edu/travel/>.

We understand.

6. If awarded a contract, do you acknowledge, agree and understand that all invoices must come from Marts & Lundy, Inc.? Mascon will not accept invoices from subcontractors.

We acknowledge, agree, and understand.

7. If awarded a contract, do you acknowledge, agree and understand George Mason University cannot guarantee a minimum amount of business?

We acknowledge, agree, and understand.

8. Do you agree to sign Mason's Standard Contract (RFP Attachment B – Sample Contract) if awarded a contract?

We agree.

Thank you again for considering Marts&Lundy. Should you have any questions or require additional information, please feel free to contact me.

Warm regards,



Penelepe C. Hunt

Senior Consultant & Managing Principal

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