A PROPOSAL FOR: GEORGE MASON UNIVERSITY

Comprehensive Campaign Counsel (RFP GMU-1773-22)

Helping Mason Achieve Philanthropic Success

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Marts&Lundy

NOVEMBER 2021

Marts&Lundy

November 17, 2021

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

Dear Ms. Rauch and Ms. Magnani,

Marts&Lundy is pleased to respond to George Mason University's Request for Proposals GMU-1773-22 for *Comprehensive Campaign Counsel*. Our firm places a high value on the relationship we have built with Mason over the years, and we are fully vested in your success. We would be honored to renew our partnership with the University and help determine the strategies necessary in this new era to optimize Mason's fundraising efforts and attract greater levels of support.

This historic initiative calls for a firm that can quickly understand the current dynamics surrounding Mason's audacious fundraising vision. Given our experience with many of the country's leading public research universities, including Mason, we believe we bring the perspectives, expertise, and resources needed to help position Mason for success in the upcoming campaign. To help you take stock of your current strengths, opportunities, and areas for improvement and prepare for another major campaign, we have put together a seasoned team of consultants to address the multiple facets of the University's advancement program and bring innovative ideas to help generate the passion and support that Mason deserves.

While the following proposal outlines our current thinking about how we can best support the University, our hope is you will view this proposal as part of an ongoing conversation. We welcome the opportunity to present our approach to ensure we have designed a partnership that meets the University's needs and expectations.

Thank you again for considering Marts&Lundy. Should you have any questions or require additional information, please feel free to contact our proposed lead consultant, Penelepe Hunt. We look forward to hearing from you soon.

Warm regards,

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** A duly appointed officer of Marts&Lundy.*

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Procedural Information

> *Response to RFP Section B. Specific Requirements, 1.a. Return signed cover page and all addenda, if any, signed and completed as required.)*

A signed RFP cover page is provided in the Appendix.

> *Response to RFP Section B. Specific Requirements, 1.b. Return Attachment A - Small Business Subcontracting Plan.*

Attachment A is completed and provided in the Appendix.

> *Response to RFP Section B. Specific Requirements, 1.c. State your payment preference in your proposal response. (See section XVI.)*

Marts&Lundy's payment preference is Option#3- Net 30 Payment Terms, electronic payment.

Company Profile

> *Response to RFP Section B. Specific Requirements, 2. Company Profile. Describe your firm's organization to include size, areas of specialization and expertise, client base and any other pertinent information so the evaluation committee may reasonably formulate a determination about the stability and strengths of your firm.*

About Marts&Lundy

Firm History

> *Response to RFP Section B. Specific Requirements, 2.a. Provide information about the firm, firm history and growth, the number of staff and experience in philanthropy/fundraising consulting.*

Founded in 1926, Marts&Lundy has been the innovative leader in providing smart, strategic, and forward-looking counsel to mission driven organizations for more than 95 years. We have partnered with nonprofits on thousands of fundraising campaigns, with goals ranging from less than $10 million to as high as $6 billion. We also have a long and successful track record partnering on major fundraising initiatives with organizations of all sizes and at all levels of fundraising maturity. Our counsel has helped many clients establish efficient campaign strategies, optimize fundraising programs, and maximize philanthropic support.

Our current firm members include 40 consultants, analysts, and communication specialists who work directly on client projects and more than 30 established relationships with of counsel colleagues, consulting partners, and affiliates who provide specialized counsel and services in areas such as prospect research, information technology, web design, and more.

Our Philosophy

> *Response to RFP Section B. Specific Requirements, 2.b. Include the firm's mission statement and/or or corporate vision/values statement.*

Fundamental to Mason's mission are innovation, diversity, entrepreneurship, and accessibility. At Marts&Lundy, we champion the same principles. While Marts&Lundy's practices continually evolve to meet the changing landscape of the nonprofit world, our values and dedication to serving the philanthropic community remain steadfast. As an employee-owned S corporation, everyone in our firm has a stake in making sure that we:

- Provide the highest service possible to our clients.
- Act with integrity in all aspects of our work and relationships.
- Increase the value of our partnerships through collaboration.
- Maximize our impact through the continued innovation of our solutions.
- Maintain our leadership by contributing to the world of philanthropy.

At the core of our consulting philosophy is the understanding that each client we partner with is unique and the belief that our services and counsel must be customized because no campaign, constituency, or need is the same. Rather than delivering an "off-the-shelf" solution, we will seek to fully understand each client's specific situation and culture so that we can tailor our approach and recommendations accordingly. Additionally, we strive to develop highly collaborative partnerships with our clients that utilize the respective skills, talents, and knowledge each individual brings to the project. This means we will take time to listen, learn, and build consensus as we work with the University's leadership, staff, trustees, volunteers, and other stakeholders to plan a successful campaign.

Finally, we believe the most effective campaign strategies are built on both seasoned experience and objective evidence. As demonstrated, our proposed process merges internal fact-finding with external research, quantitative analysis with qualitative evaluation, and proven best practices with strategies specific to Mason.

Our Commitment to Diversity, Equity, Inclusion, and Access

> *Response to RFP Section B. Specific Requirements, 2.c. Provide information on your firm's diversity plan.*

Marts&Lundy recognizes that in order to help nonprofits advance their missions, we need people and practices that reflect the change we want to see in the world and the big ideas our clients strive to reach. To that end, we are dedicated to ensuring that our firm is diverse, and our actions foster a culture of inclusivity, equitability, and accessibility. As part of this commitment, we have put action into our hiring, ideas, words, thinking, policies, processes, and services. As specifically addressed in our firm’s strategic plan and employment policies, Marts&Lundy is dedicated to recruiting, retaining, and promoting a diverse workforce and creating a climate of respect that supports the success of each individual firm member. We believe that this commitment empowers us to develop the most innovative ideas, best respond to the needs of our clients, and maximize our individual and collective contributions. The following is a sampling of the actions we are taking:

- Our current strategic plan identifies DEI initiatives as a top priority for the firm.
- Inclusion is one of our stated firm values.
- We have a standing internal DEI committee of 20 firm members who drive internal initiatives across multiple facets of diversity, equity, and inclusion.
- Our Client Diversification Initiative, a partnership with Lever for Change, provides pro bono and subsidized services to organizations in the public benefit sector that wish to expand their fundraising capabilities but cannot afford traditional consulting.
- Our consultants include DEI content in all of their client engagements, whether as a formal part of the services offered, or as a recurring theme in project work.

We are, and always will be, on a journey right alongside our clients. Together, we will continue to move in the direction of good. We know there is much work to do on this front and strongly believe it is critical to look deeper inside of our own firm and take meaningful, concrete steps internally while also committing to help our clients embrace real and lasting change as part of their philanthropic and organizational goals.

Our Experience with Higher Education Clients

> *Response to RFP Section B. Specific Requirements, 2.d. Provide demonstrated experience of similar higher education projects with similar scope and size.*

As the originator of the campaign feasibility study methodology, Marts&Lundy brings an unparalleled mastery of the skill needed to successfully conduct this critical phase of campaign planning. Our firm primarily focuses on pre-campaign, campaign, and post-campaign planning and consulting. Marts&Lundy’s unique, multi-dimensional approach addresses both external conditions and internal resources through a combination of personal interviews, predictive data analytics, and program evaluation.

The following is a representative listing of higher education clients to which we have provided campaign services and counsel (including readiness assessments and feasibility studies, data analytics, communications counsel, and/or ongoing consulting) along with information on their campaign goals and amounts raised to date.

Institution	Campaign Goal	Amount Raised to Date	Status
Butler University	$250 million	$213 million	In progress
California State University, East Bay	$60 million	$66 million	Concluded
California State University, Fullerton	$200 million	$166 million	In progress
Eastern Michigan University	$50 million	$56 million	Concluded
Florida International University	$750 million	$681 million	In progress
George Mason University	$500 million	$690 million	Concluded
Indiana University of Pennsylvania	$75 million	$83.1 million	In progress
James Madison University	$200 million	$178 million	In progress
Northern Arizona University	$100 million	$103 million	Concluded
Pomona College	$250 million	$316 million	Concluded
Rensselaer Polytechnic Institute	$1 billion	$400 million	In progress
San Diego State University	$750 million	$815 million	Concluded
University at Buffalo	$650 million	$710 million	In progress
University of Arkansas for Medical Sciences	$325 million	$385 million	Concluded
University of California, Riverside	$300 million	$312 million	In progress
University of Illinois at Chicago	$750 million	$695.8million	In progress
University of Massachusetts Amherst	$300 million	$379 million	Concluded
Virginia Commonwealth University	$750 million	$841.6 million	Concluded
Wayne State University	$750 million	$776.5 million	Concluded

A full list of our firm's current and recent higher education clients is provided in the Appendix. For a list of our clients across all sectors, please visit www.martsandlundy.com/where-we-serve/clients/.

Subcontractors

> *Response to RFP Section B. Specific Requirements, 2.e. Include information on any subcontractors who will be providing the goods and/or services.*

Our proposed team includes Marts&Lundy Consulting Partners Mark Kelleher and Charlie Melichar. Mark will serve as co-counsel while Charlie will lead the Communications efforts. Details on their roles and qualifications are provided in the section, *Your Marts&Lundy Team*, on page 20.

Implementation

> *Response to RFP Section B. Specific Requirements, 3. Implementation. Describe the methods and processes that you would use to complete the tasks and objectives outlined in section XI. Statement of Needs.*

Our Understanding

With roots dating back to 1957, George Mason University is a dynamic public research university that promotes freedom of thought, inclusivity, self-discovery, and innovative learning experiences. Ranked among the best National Universities by *U.S. News & World Report*, Mason graduates receive a high return on their investment – 80 percent are employed within six months of graduation. The University also receives acclaim for its diverse student body, cadre of 1,400 award-winning teaching and research faculty, and sustainability efforts. As Virginia's largest public university, Mason offers more than 200 undergraduate, graduate, and certificate programs, including the esteemed Antonin Scalia Law School. Its academic strength spans a wide range of disciplines, from business administration to nursing to religious studies. Through quality instruction and pioneering research, Patriots are uniquely prepared to meet the challenges of an ever-changing world.

In supporting the needs of an ambitious institution, Mason's Office of Advancement and Alumni Relations has an equally laudable track record. The University's most recent comprehensive campaign, *Faster Farther*, closed in 2018, raising $690 million (exceeding its goal) to support research, student scholarships, and construction of new facilities across Mason's three Virginia campuses. These accomplishments have propelled Advancement and Alumni Relations to a new level of success and expertise — and a new level of expectations.

Looking ahead, the University is in the midst of a planning process to solidify Mason's strategic direction and vision going forward. To support the priorities that will come from the new strategic plan, Mason is looking to initiate the largest comprehensive campaign in its history. Knowing that skilled preparation will be critical to campaign success, the University is seeking an experienced fundraising consulting firm to help Mason assess its philanthropic potential, better understand the motivations of its potential donors, and help design and implement a strategy for an inspiring campaign.

Marts&Lundy has custom designed an approach that will help Mason be ideally positioned not only for the proposed campaign but also for long-term success. We will merge internal fact-finding with external research, quantitative analysis with qualitative evaluation, and best practices with Mason-specific solutions. We will help identify the University's fundraising opportunities and challenges, quantify your campaign potential, help develop key messaging to generate excitement, identify approaches for deepening donor engagement and attracting new champions, and deliver recommendations on the ideal size, scope, and timing of the campaign.

Our Proposed Approach

Based on our current understanding of your needs, we have designed a three-phased engagement that will enable a thorough examination of the internal and external factors critical to fundraising success.

- **Phase I: Internal Campaign Readiness Assessment**. We will evaluate your campaign readiness and provide recommendations that will help you increase efficiency, utilize resources strategically, and strengthen your philanthropic capacity. We will also review and refine your preliminary case for support. At the end of this phase, we will deliver an interim report of our findings.
- **Phase II: Campaign Planning (Feasibility) Study**. We will quantify the anticipated level of support for the campaign, determine an attainable — yet bold — campaign goal, analyze how peer institutions are performing, and help you understand which donors have the greatest capacity for giving. We will also use the preliminary case document to seek and evaluate external responses to the campaign. Through a series of key constituent interviews and an online survey, we will test the campaign's proposed scope and priorities with constituents. At the end of this phase, we will synthesize the results of our work into a final report of our findings with clear-cut action items for moving forward.
- **Phase III: Campaign Counsel**: After the completion of the internal assessment and study, we will provide ongoing counsel throughout the implementation of the campaign, customized training workshops, and assist with preparing the final case and messaging.

Because we believe effective communication and consensus-building will be essential, throughout all phases of the engagement, we will provide regular updates to keep Mason aware of our progress and what we are learning. We also will be available by phone and email to help address any emerging issues or opportunities.

Phase I: Internal Campaign Readiness Assessment

Internal Assessment

To help Mason determine what will be needed internally to mount a major campaign, we will conduct an **Internal Assessment**. This assessment will highlight the areas that are working well and pinpoint the areas that could be improved to maximize your philanthropic success. Our goal will be to identify opportunities to increase the effectiveness of your fundraising efforts across all relevant units and strengthen approaches to meet both short-term and long-term goals.

Overview of Process

- **Project Kickoff:** At the start of the engagement, we will facilitate a Project Kickoff meeting to ensure we have a full understanding of your goals and priorities. During this meeting, we will examine the scope of work, finalize the project schedule, and review expectations with the Foundation and University teams. This step will provide everyone with a solid framework for both the overall project and our partnership, based on a shared understanding of the project's objectives.
- **Materials Review**: We will ask for a variety of materials to ensure we have a solid understanding of your current situation. Documents and data include the 2014-2024 Strategic Plan, recent campaign results (*Faster Farther*), reports detailing giving histories, Office of Advancement and Alumni Relations staffing and volunteer structures, performance metrics, budgeting and financial projections, fundraising models, workflows, policies and procedures, as well as materials that allow us to envision the donor's experience (i.e., signature communications materials, sample appeals, gift agreements, acknowledgement letters, and stewardship reports).
- **Trends Analysis**: We will assess high-level, fundraising performance trends over the past ten years. This will include examining a range of historical productivity metrics — annual giving, campaign giving, board giving, Advancement expenses, fundraising revenue per gift source, and more. By highlighting changes over time, the Trends Analysis can help you better understand fundraising performance to date, pinpoint opportunities for improvements where Mason may be underperforming, and identify areas where performance is strong.
- **Personal Interviews and Small Group Conversations**: Our process is built on asking the right questions of the right people. We will spend several days conducting interviews and facilitating small group conversations with important campaign stakeholders. The one-on-one interviews and group conversations will be designed to gather valuable insight on overall fundraising efforts and generate thought-provoking discussions about what will be required for Mason to achieve its philanthropic aspirations. This also will be an opportunity to establish a shared sense of partnership and boost enthusiasm for the upcoming campaign. We will work with you to identify the best number and mix; however, our initial thinking is up to 50 participants that include Office of Advancement and Alumni Relations team members; George Mason University Foundation staff; President Washington; as well as select Mason institutional and academic leadership, board members, and vendors.

Subject Areas Covered

At this time, we expect to focus on the following topics, but more areas of exploration may be uncovered as the assessment progresses.

- **Staffing**: We will evaluate whether Mason's Office of Advancement and Alumni Relations is sufficiently staffed and supported to manage the rigors of a comprehensive campaign. This will include a close examination of the fundraising skills currently in place and the effectiveness of the current staffing structure. We will make recommendations for allocating resources effectively and advise on any adjustments and/or additional staff training that may be beneficial.

- **Giving programs**: Success in securing gifts requires a laser focus on engagement and relationship building. We will assess the University's current giving programs (i.e., Mason Excellence Fund, General Scholarship Fund, principal, major, annual, planned, and corporate/foundation) and provide recommendations for enhancements where needed. Our focus will be on identifying opportunities to build upon the current efforts, attract new supporters, and engage existing donors at higher levels.
- **Communications**: Compelling messaging that engages and motivates supporters will be essential to achieving the University's bold ambitions. As such, we will evaluate the strength of Mason's current communications to ensure they are purposeful, strategic, and engaging the right audience. This will include a review of signature print and digital publications (including social media and the website), platforms, as well as materials used for donor-facing events and other engagement activities.
- **George Mason University Foundation operations**: We will review the Foundation's systems, processes, policies, and procedures, and identify those that we recommend for amendment or enhancement. This includes policies for gift handling, receipting, acknowledgement, stewardship, and donor recognition. We will also assess the adequacy of your information systems and review what fundraising metrics are in place to measure and track effectiveness.
- **Prospect identification and management**: Effective prospect management will be vital for continued, increased, and sustainable giving. We will evaluate the approaches used for identifying, managing, and tracking prospect and donor relationships through each phase of the fundraising cycle. This will include a review of prospect identification, qualification, and portfolio management policies, procedures, and practices. We will make recommendations related to expanding the donor pool, enhancing moves management, and most effectively building and utilizing prospect management tools. We will also provide counsel on change management related to adoption of prospect management practices in the new CRM and aiding in adherence to defined policies and procedures.
- **Donor engagement**: We will assess current donor engagement approaches and provide recommendations for improvements where needed. This will include evaluating how donors and prospects are identified, assigned, cultivated, solicited, and stewarded. We will also review the integration of personal asks, proposals, letters, brochures, and platforms.
- **Institutional and academic leadership engagement**: We will review the role and expectations of the University's institutional and academic leaders and gauge their enthusiasm for engaging with fundraising efforts. We will make recommendations for strengthening the partnerships between key campus figures and Advancement and Alumni Relations.
- **Board of Visitors, Foundation trustees, and volunteer engagement**: We will examine how members of the University Board of Visitors and Foundation trustees participate in Mason's philanthropic endeavors — both as donors and fundraising partners — and identify opportunities for increasing their commitment and involvement. We will evaluate the potential

campaign volunteer leadership needs and determine how members of your broader volunteer community are being leveraged to support fundraising initiatives.

- **Alumni engagement**: Alumni comprised 35 percent of donors during the *Faster Farther* campaign and are essential members of the Patriots community. With that in mind, we will review your alumni programs and assess the level of strategic integration between the advancement and alumni relations teams. Our goal will be to help design creative strategies for enhancing the engagement of the University's 200,000+ alumni and promoting positive relations that are rewarding for both alumni and Mason.
- **Campus culture**: We will review to what level the broader community embraces and engages in philanthropy. Our goal will be to identify any cultural obstacles that may need to be overcome to advance fundraising productivity, capture the most powerful attributes of the University's philanthropic culture, and identify how those might align with the campaign.

Benchmarking Study (Peer Comparison)

Marts&Lundy's deep experience with higher education institutions means our consultants are familiar with the best practices other institutions are using. While we will bring this knowledge to our work with Mason, we will also conduct a **Benchmarking Study** to gather additional information that can be used to contextualize our recommendations and guide the University's decisions on future investments in fundraising.

To capture data that will best inform your philanthropic strategies, we will work closely with you to determine the comparison cohort and research parameters. We will then conduct the Benchmarking Study in one of two ways, depending on your needs.

- **VSE data comparison**. More than 1,000 colleges and universities provide information to the Council for Advancement and Support of Education (CASE) about their fundraising results and institutional expenditures through the Voluntary Support of Education (VSE) survey. We can compare Mason's fundraising outcomes and investments with those of a selected group of institutions that have responded to this survey.
- **Expanded data collection and comparison**. Should Mason wish to study parameters and/or cohorts beyond what is available through VSE, we can work with you to design a customized approach to gather additional data points and recruit six to eight peer and/or aspirant institutions. This option would also include results from the VSE data comparison.

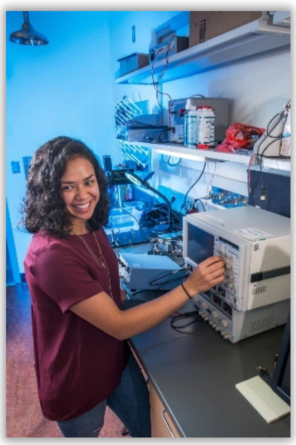
After collecting and analyzing the data and combining it with information from Marts&Lundy's knowledgebase, we will synthesize the results and identify Mason's greatest strengths and opportunities.

Preliminary Case for Support

The best campaigns have a sense of celebration (*pride in who you are and the impact you make*), commitment (*excitement about where you are going*), and clarity (*articulation of what sets you apart*). At a time when competition for philanthropic resources is fierce, it will be essential that the campaign clearly communicates Mason's distinctive impact and explains why the funding priorities are critical to advancing its overall mission and strategic plan objectives.

A compelling **Preliminary Case for Support** is the first step in achieving this goal. It is your opportunity to motivate, inspire, and engage current and prospective donors who will drive campaign success.
Our approach to crafting a strong case is to marry logic (*strong, supportable reasons for giving to Mason*) with emotion (*Why does this matter to me?*). We believe effective messaging for Mason will answer three fundamental questions:

- **Why us?** George Mason University? What is it about you that merits consideration of one's philanthropic support? What changes, opportunities, and promises lie ahead? How does Mason's vision for the future inspire prospective donors?
- **Why you?** Why the donor? Why is there a need for philanthropic contributions to advance top priorities? Why is philanthropy a must-have, not a nice-to-have, for Mason? What are the emotional triggers that connect donors to Mason?
- **Why now?** Is there a sense of urgency? What is at stake? What opportunities will be missed if funds are not available? How will Mason be strengthened and have an even greater impact as the result of a successful campaign?



This preliminary case will introduce your boldest aspirations — and the campaign that will support those aspirations — and encourages supporters to partner with you to achieve your vision. It will be used to introduce the University's message to key supporters and to frame meaningful conversations throughout campaign planning. We will test the effectiveness of the case in the Key Constituent Interviews and Online Constituent Survey.

Our writing process will include reviewing development and communication materials, interviewing key Mason leaders and staff to capture your tone and voice, and up to three drafts of the document, allowing for feedback and fine-tuning. We will help ensure that the document is structured to emphasize key messages, so interviewees can easily navigate through the document to focus on what interests them. This will promote more precise questioning during conversations with your top donors and prospects. We recommend that the preliminary case be marked as a "Consultative Draft" to signal to interviewees that they are on the front end of an important discussion and have an opportunity to help shape the University's plans. The service we recommend is for writing and light design, however we are happy to discuss additional options.

Campaign Readiness Report

At the conclusion of Phase I, we will prepare and present an in-depth report of our findings with recommended action items for moving forward. The report will include, at a minimum:

- Identified strengths and challenges in the Advancement program: what is working well and what might be improved to support philanthropic initiatives over the short-term and long-term.
- Proposed changes to staffing, with potential job responsibilities and task allocations.
- Budgeting recommendations and the identification of any additional resources needed to position Mason for campaign success.
- Advice on strengthening core fundraising competencies: prospect management, donor recognition and stewardship, and gift acceptance and compliance.
- Recommended solutions for any infrastructure issues: policies and procedures, database and information management, reporting, and more.
- Identified training opportunities for Advancement and Alumni Relations staff, University leadership, visitors and trustees, and other volunteers.
- Insights on today's best practices and trends in higher education fundraising that could be successfully adopted by Mason.
- An analysis of the culture of philanthropy at Mason, with suggested actions the University can take to help its different constituencies understand their roles as members of the community, including giving.

To ensure clarity and accuracy, a draft of the report will be shared with Advancement and Alumni Relations leadership. After making any refinements, we will present the final report to the audiences you deem appropriate. At the presentation, we will review our findings in detail and describe how our conclusions were reached.

As we progress through Phase II of the engagement, we will further develop our recommendations. Updated findings will be included in the Campaign Planning Report, described on page 14.

Phase II: Campaign Planning (Feasibility) Study

Capacity Analysis

To measure the major giving capacity of your donor base, determine a viable campaign goal for the upcoming campaign, and project the staffing level needed to achieve success, we will conduct a **Capacity Analysis**. This data-driven, evidence-based methodology is an effective tool for right-sizing campaign goals. Knowing the precise range of philanthropic potential has helped many of our clients accurately position their campaigns and fundraising priorities. A synopsis of our study on the effectiveness of the Capacity Analysis is appended to this document.

To begin, we will examine recent wealth screening data, inspect historic gift behavior, and manually review the highest-capacity prospects with the appropriate Advancement and Alumni Relations staff. Then, using our proprietary algorithms, we will translate this information into a projected campaign range and provide a fine-tuned ranking of prospects based on their financial capabilities and their relationship with Mason. Additionally, the analysis will include a calculation of the number of frontline fundraisers required to achieve various goals. The reportable outcomes of the Capacity Analysis will include:

- **Baseline projections**: Using forecasting models and up to 10 years of actual baseline gift history data (sources of giving that are not typically responsive to campaign activities), we will build a forecast of dollars likely to be raised from all baseline sources during the campaign.
- **Major gift yield**: Our analysis will provide a realistic understanding of the outcomes you can expect at the major gift level, with a view of prospects (1) categorized by giving capacity based on the results of wealth screening and the manual review of prospects, and (2) segmented by likelihood to give a major gift determined by prior giving patterns.
- **Realistic gift tables**: Most campaigns succeed largely because of major or "elastic gifts," those gifts significantly influenced by campaign activities. Our tables include only major, elastic gifts and will identify the total number of major gifts needed to meet various goals.
- **Staffing requirements**: We will identify the number of major gift staff and productivity levels needed to successfully align staffing with philanthropic potential. Our analysis accounts for the resources needed to qualify prospects, make solicitation visits, and successfully close gifts.

We can immediately put the results to use, helping you determine how and where to prioritize cultivation activity and new prospect generation. Additionally, we will compare your results to those of similar higher education institutions that we have tracked in our database, which will provide invaluable context to our findings.

NOTE: *We understand Mason's most recent wealth screening was conducted in July 2020. Before starting, we will review your recent wealth screening to ensure adequate data has been captured from the appropriate constituent populations. If needed, we will work with you to determine how to best gather any additional data required for our analysis.*

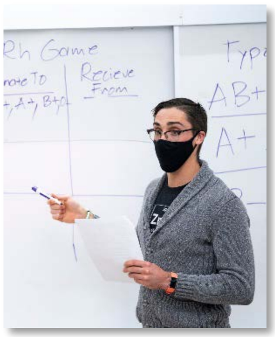
Unit Yield Analyses

While the Capacity Analysis will reveal university-wide opportunity, it will be beneficial to understand the portion of total major gift yield associated with certain Mason colleges and schools that will be particularly critical to campaign success. Where beneficial, we can conduct **unit-specific analyses** to gather this data. If desired, we would work with you to determine where this extra level of data-driven insight is needed.

We would use the outcomes of the analysis to help Mason determine where to focus activity for deeper donor engagement. Additionally, we would compare your Capacity Analysis results to those of other institutions we have tracked in our historical database. This would provide insight into Mason's position among similar institutions.

Key Constituent Interviews

Once the preliminary case is ready, we will conduct **Key Constituent Interviews** to capture the attitudes and inclinations of top prospective campaign donors. These interviews will glean insights about participants' attitudes toward Mason, assess interest in supporting the campaign, help identify potential volunteer leaders, and capture reactions to the funding priorities and messaging — invaluable input that will help fine-tune strategy. In addition, the interviews will act as a powerful cultivation tool because interviewees will know Mason values their opinions.



At this time, we propose conducting 40 personal interviews to get full insight into the perceptions of key prospects, donors, and lead volunteers. The quantitative research involved in our Capacity Analysis allows the qualitative interview phase to be more finite in scope, enabling us to focus on the very top prospects that will likely account for 60 to 80 percent of key campaign gifts. The online survey, discussed below, will considerably extend the reach of the study and help engage thousands more prospective donors.

We will work with you to determine the best interview participants. In addition to visitors, trustees, and current top donors, the make-up of the interview pool could include mid-tier donors, alumni with the capacity to become major donors in this campaign, corporate and foundation leaders capable of making large commitments, and community influencers with the ability to make significant contributions and inspire others to support the campaign.

Our extensive experience with Key Constituent Interviews has shown which questions are most effective at eliciting information helpful to shaping strategy. Armed with that knowledge, we will work with you to design questions that are specific to Mason and the campaign.
Among many areas of exploration, the interviews will enable us to:

- Assess overall impressions of the University's mission, reputation, and leadership.
- Generate broad discussion about your vision, goals, and corresponding funding needs.
- Gather insight on aspirations for Mason's short-term and long-term future.
- Seek opinions on prior fundraising efforts and the current donor experience.
- Capture donor interests and motivations for giving.
- Assess reactions to the proposed campaign and funding priorities.
- Gather opinions about the campaign strategy and likelihood of success.
- Identify other campaigns/organizations that may be competing for donor attention and support.
- Gain an understanding of where Mason falls among participants' philanthropic priorities.
- Assess willingness to participate in the campaign as leaders and donors, and at what level.
- Identify opportunities for connecting with others who may be interested in supporting Mason.

Online Constituent Survey

Because a campaign can and should be a vehicle for engaging more than just top donors, we will supplement the Key Constituent Interviews with an **Online Constituent Survey**. This survey is an efficient and cost-effective way to bring a larger group of prospective donors into the early planning stages, qualify existing prospects, uncover new ones, and identify any roadblocks to fundraising. In addition to capturing insights related to the campaign, the survey will generate a great deal of constituent-specific data that can be used in creative and powerful ways. Survey invitations state very clearly that the survey is not anonymous. This approach enables us to link responses with identification numbers, providing you with actionable information for individual cultivation and solicitation efforts. For example, if the survey finds that a substantial number of respondents considering a gift are located in a certain city, Mason can increase outreach in that area.

We propose surveying up to 15,000 mid-tier donors and alumni who are not being individually interviewed and for whom you have active email addresses. We will work with you to identify the best population to invite, using the results of the Capacity Analysis as a guide. We also will work with you to design survey questions that are aligned with the Key Constituent Interview questions for relevant comparison. We will then deploy the survey with a modified version of the preliminary case.

At the completion of the survey, we will provide a summary and in-depth analysis of the results, which will include a comparison of your survey outcomes to those of similar institutions. We also will provide a database of all responses that allows further segmentation by donor interest, affinity, and capacity. This will give Mason a broader picture of its prospects and a deeper understanding of how best to proceed in building relationships.

Campaign Planning Report

At the conclusion of the Campaign Planning Study, we will prepare and present a comprehensive report of our findings and recommendations, with clear-cut action items for moving forward. Your **Campaign Planning Report** will include, but not be limited to, the following:

- An in-depth analysis of the University's fundraising potential, with a gift table that focuses on the number of major gifts that must be raised to achieve various goals.
- Detailed analysis of benchmarking results, with insights on best practices that could be successfully adopted by the University.
- Recommendations for a realistic — yet aspirational — campaign goal.
- Detailed analysis of the responses to the interview and survey questions, with representative quotes from respondents.
- Evaluation of the preliminary case and recommendations for developing the full case.
- Identification of the funding priorities most likely to resonate and garner support.

- An evaluation of constituents' willingness to involve themselves in the campaign as volunteer leaders and donors.
- Creative campaign strategies, including suggestions for cultivating and soliciting lead gifts.
- Guidance on the development of appropriate campaign volunteer structures and the recruitment of volunteer leadership.

We will share a draft of the report with Advancement and Alumni Relations leadership for review and feedback. After making any needed refinements, we will present the final report to the audience you deem appropriate. During this presentation, we will review our findings in detail and describe how our conclusions were reached.

Comprehensive Campaign Strategic Plan

Building on the results of the first two phases of the engagement, we will work with you to develop a **Comprehensive Campaign Strategic Plan** that will guide Mason over the course of the campaign. The plan will expand upon many of the recommendations described in the Campaign Planning Report and will include, but not be limited to, the following:

- Overall campaign strategy and architecture, including which funding priorities should be included.
- Suggested milestones and a timetable that is detailed for the first 18 months, with a broader set of milestones for the rest of the campaign.
- A staffing plan that identifies the ideal number of staff and volunteers needed to achieve fundraising and marketing objectives.
- Identification of strategies for donor segmentation and solicitation.
- Recommendations for campaign marketing, both internal and external.
- A detailed campaign budget for the necessary resources.
- Direction on campaign operations: campaign counting policies, draft gift acceptance and naming policies, and campaign tracking tools.

Phase III: Campaign Counsel

Ongoing Counsel

To ensure Mason has continual access to our expertise as the campaign moves forward, we will provide **Ongoing Counsel** following completion of Phase 2 activities. The broad goals of our counsel will be to:

- Ensure that Mason is continuing to enhance and refine its case for support, grow its constituent base, and have the best possible return on its investment in fundraising.
- Assist with the implementation of recommendations from the planning study.

- Generate creative fundraising approaches that will help the University energize its donors and broaden its outreach.
- Facilitate the effective use of staff, volunteers, and other resources.
- Empower leaders, staff, and volunteers with knowledge and techniques that will serve Mason long after the campaign has ended.

Designed with the flexibility to scale to any changes in your needs, our counsel provides options to ensure Mason receives timely advice on any emerging priorities. To keep our work calibrated to your needs, we will work in close collaboration with you to adjust the parameters of our counsel as the campaign progresses. The following is a sampling of what our counsel could entail.

Campaign Strategy

To help maximize fundraising outcomes, we would continue to advise Advancement and Alumni Relations on strategies related to campaign preparation, implementation, and execution. Among many things, we can:

- Help refine strategies for cultivating, soliciting, and stewarding different constituent segments.
- Generate creative strategies that will help Mason expand engagement with major donors, reach for higher-level contributions, and attract new supporters.
- Provide guidance on campaign marketing and communication strategies, including recommendations for both internal and external audiences.
- Recommend and support the implementation of metrics to track and monitor performance throughout the campaign.
- Assist with developing a Campaign Steering Committee and actively participate in committee, campaign strategy, and board meetings.

Prospect and Donor Management

To help you effectively interact with and move key prospects from cultivation to closure, we can:

- Coach and mentor fundraisers as they build relationships with top prospects.
- Provide advice on strengthening core prospect management competencies.
- Work with you to determine where to prioritize solicitation and cultivation activity.

Campaign Management

Our oversight of the campaign would center on focusing resources, driving decision-making, and keeping the campaign on track. Among many activities, we can:

- Provide direction on campaign operations such as campaign counting policies, draft gift acceptance and naming policies, and campaign tracking tools.
- Help track campaign activity and monitor the achievement of milestones.
- Advise leadership and key staff on any campaign implementation issues or challenges.

Training Workshops

Well-trained staff, leadership, and volunteers are key to the success of any campaign. We will work with you to design and deliver bespoke training programs that will help build skills and confidence, promote improved relationships with donors, and drive advancements in fundraising results — all within the context of Mason's unique culture. While training would be tailored to your specific needs, our workshops are typically segmented to cover basic competencies for the following groups:

- **Advancement and Alumni Relations staff**: Staff training typically focuses on core engagement skills, tailored to the participants' responsibilities: managing a portfolio of volunteers or prospects; developing cultivation and solicitation strategies, getting appointments and preparing for meetings, asking the right questions, making the ask for time, talent, or treasure, handling objections and difficult questions, and following up.
- **University leadership**: Key leaders outside of an advancement team can sometimes be reluctant to participate in solicitation calls because they are unsure of their skills. Our sessions for this group are typically designed to help participants gain confidence in cultivation and solicitation, identify appropriate roles for themselves in the process, and learn how to work as part of a team.
- **Visitors, trustees, and volunteers**: Sessions for board members and other senior volunteers often explore their role in fundraising, from opening doors to closing gifts; review effective strategies for making the best use of their contacts; and provide practice with the case for support.

Our workshops are highly interactive and encompass a mix of presentation, discussion, role-playing, and hands-on work. Exercises would use Mason's own materials and information to ensure participants can apply their new knowledge directly and immediately to their work.

Campaign Communications Plan

We will work with you to develop a multi-channel, comprehensive **Campaign Communications Plan**. Drawing on Mason's existing mix of communications channels, along with any available data on the impact of these platforms, we will recommend a mix of strategies and tactics best suited to help you appeal to key stakeholders, elevate your brand and philanthropic profile, and achieve your fundraising goals. This plan will likely need to be adjusted as opportunities arise, but it will provide you with a clear roadmap for planning and resource allocation.

As part of this work, we will explore several foundational questions, such as:

- ✓ What can we learn from marketing and communications strategies used to date?
- ✓ What current channels and venues are most effective today for the Advancement and Alumni Relations team and Mason in general, and why?
- ✓ What do we know about the communications preferences of various audiences for this campaign? Is there current research that is actionable for our purposes?
- ✓ What is the right mix of print and digital assets as we seek to personalize communications strategies and deliver messages across a range of media platforms?
- ✓ How do we employ a storytelling motif that is engaging and inspiring, and creates a sense of awareness of Mason and for the importance of this campaign?

We propose that the Campaign Communications Plan be organized around the three core principles that we see as the fundamental elements of effective communications:

- **Messaging**: We will work with you to fine-tune campaign messaging and ensure that Mason has a compelling set of key messages and talking points — for the overall campaign and in support of each major funding priority — that will inspire prospective donors and provide a distinctive organizational identity.
- **Audiences**: The plan will address audience segmentation and the importance of avoiding a one-size-fits-all approach to campaign communications. We will identify and segment key donor audiences as the receivers of those messages, with a particular focus on top donor prospects and the broader segment of internal and external constituents.
- **Strategies and tactics**: We will work with Mason to ensure that the core messages for the campaign are delivered powerfully and consistently. We will leverage best practices across a variety of communication channels and venues, from print to digital to film, and from social media and campaign events to cultivation and solicitation visits.

The Campaign Communications Plan will include:

- Strategies to build awareness for the campaign among segmented audiences and across multiple channels.
- Recommendations for print, digital, and video collateral for various constituencies.
- Collaboration with Mason team members to provide specific recommendations for how campaign content could evaluate existing publications, social media channels, and other efforts.
- Recommendations for developing a suite of fundraising tools to reach, engage, cultivate, and inspire constituents.
- A roll-out plan schedule for all tactical elements.
- Metrics for success.

Leadership Phase Case for Support

Building on the feedback received from constituents in Phase 2, we will work with you to fine-tune the messaging in the preliminary case and create the next iteration of the case. The post-study version of the case will sharpen the narrative and the language around the top fundraising priorities. We recommend that this version — to be used throughout the Leadership Phase of the campaign — include a high level of design and photography, as well as sidebars and profiles to give a human face to the campaign. If we were to take the lead on further developing the case, our work would likely entail:

- Refining the case narrative.
- Conducting interviews and writing sidebars and profiles (staff, patrons, donors).
- Developing the creative concept for the campaign (visual branding).
- Providing up to three design concepts for review.

Campaign Marketing & Materials

We will recommend a comprehensive mix of strategies and tactics to help you appeal to donor prospects and achieve your campaign goals. Our goal will be to help Mason break through the noise and clutter that is vying for the attention of your prospective donor audience and reach them in effective and engaging ways. In doing so, we will assess and, as needed, refine the outline of anticipated resources, including: website, social media, campaign publications (digital and print), video(s), and more.

Preliminary Timeline

> *Response to RFP Section B. Specific Requirements, 3.a. Provide the project timeline.*

The following table illustrates our preliminary timeline for the engagement. We look forward to discussing the timing that will best suit Mason's schedule.

Key Activities	Months											
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Phase I: Internal Campaign Readiness Assessment												
Perform Internal Assessment	■	■	■									
Conduct Benchmarking Study (Peer Comparison)		■	■									
Develop Draft Preliminary Case for Support				■	■							
Prepare and Present Campaign Readiness Report						■						

Key Activities	Months											
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Phase II: Campaign Planning (Feasibility) Study												
Conduct Capacity Analysis and *optional* Unit Yield Analyses*							■	■				
Conduct Key Constituent Interviews							■	■	■			
Design and Deploy Online Constituent Survey								■	■			
Prepare and Present Campaign Planning Report										■	■	
Prepare and Deliver Comprehensive Campaign Strategic Plan											■	■
Phase III: Campaign Counsel												
Provide Ongoing Counsel, Training Workshops, Develop Campaign Communications Plan, Leadership Phase Case for Support, and Campaign Marketing Materials												➡

* *While the RFP positions this service in Phase II, we recommend you consider conducting the Capacity Analysis earlier in the process. Information from our analysis will inform our recommendations regarding portfolio structure, staffing deployment, and resource needs. These are important components of the Internal Assessment.*

Your Marts&Lundy Team

> *Response to RFP Section B. Specific Requirements, 3.b. Describe the project team and identify the staff dedicated to this project including their title, role and qualifications (resume or bio).*

The team we have assembled for this engagement bring decades of development experience, with specialized expertise in fundraising for higher education , annual and endowment giving, campaign planning, operational assessments, donor and volunteer engagement, data analytics, strategic communications, and more. Below are brief descriptions of each team member and their proposed role for this engagement, followed by their résumés.

- **Penelepe Hunt** will serve as your lead consultant. She will provide overall strategic guidance and will be actively involved in all aspects of the project. The Managing Principal of our Higher Education Group, Penelepe has helped many public universities achieve campaign success.
- **Sarah Clough** and **Mark Kelleher** will serve as co-counsel, partnering with Penelepe throughout the engagement. Sarah brings 15+ years of experience in advancement. Mark's extensive experience on the front lines of university advancement will be beneficial to Mason.

- **Charlie Melichar** will lead the assessment of Mason's marketing and communications during the Internal Assessment, and work with Mason to ensure the preliminary case is ready for external testing, as well as finalize the leadership phase case statement and campaign marketing and communications. Charlie brings 20+ years of experience integrating philanthropy and marketing strategies and unique, first-hand knowledge of Mason's environment.
- **Sarah Williams** will oversee the work of our Analytical Solutions group on the Trends Analysis, Benchmarking Study, Capacity Analysis (and unit yield analyses), and the Online Constituent Survey. This talented team of analysts has helped many public universities utilize data to develop effective campaign strategies.
- An **Associate Consultant** will be assigned to work closely with the entire team to deliver on project objectives and provide tactical support as needed throughout the engagement.

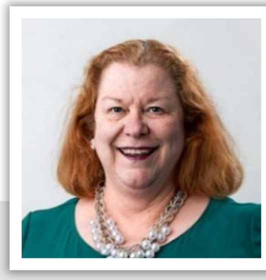
In addition, while we have designated key staff for this project, Mason will also have access to the collective wisdom and full resources of our firm — including consultants, of counsel colleagues, consulting partners, and affiliates — ensuring the team we have assembled for this project has access to a vast amount of specialized knowledge that can be tapped to meet any needs encountered during our engagement. More information on our personnel can be found at https://www.martsandlundy.com/who-we-are/.

> *who within your firm will have prime responsibility and final authority for the work completed.*

Our lead consultant, Penelepe Hunt, will serve as Mason's main point-of-contact having primary responsibility for the engagement and final authority for the work completed.

Penelepe C. Hunt

Senior Consultant & Managing Principal
Education Practice



Education:	Pomona College, B.A., Kellogg School of Management Northwestern University, M.B.A.
Residence:	Highland Park, Illinois

Experience

Penelepe joined Marts&Lundy in 2013 after 28 years as an advancement professional in higher education and the arts. As Penelepe's professional responsibilities grew, culminating in her position as Vice Chancellor for Development at University of Illinois at Chicago (UIC), so too did Penelepe's role as a mentor for fellow development professionals. While at UIC, Penelepe consulted with a variety of nonprofit organizations, providing executive coaching and facilitating training programs for deans, senior academic leaders, and development staff.

Penelepe's tenure at UIC spanned nine years, during which time she led a $650 million comprehensive campaign. The campaign ultimately exceeded its goal by $26 million. Prior to her move to UIC, Penelepe served as Associate Vice President and Campaign Director for Northwestern University. During her 12 years at Northwestern, Penelepe designed and led a successful $1.5 billion campaign.

A frequent faculty member for the Council for Advancement and Support of Education (CASE), Penelepe created and chaired the national conference, Advanced Development for Deans, and was chair of the 2012 CASE Summit for Advancement Leaders. Penelepe was awarded CASE's prestigious Steuben Apple for excellence in teaching. Her book, Development for Academic Leaders, a Practical Guide to Fundraising Success, is an essential resource for university leaders and their advancement colleagues. Penelepe's numerous contributions to philanthropy were recognized by the Chicago Chapter of the AFP with the Benjamin Franklin Award.

Representative List of Clients Served

California State University System
Chicago State University
City Colleges of New York
Columbia University
Florida International University
Iowa State University
James Madison University
Louisiana State University Foundation
Montana State University
Northern Arizona University
Northern Illinois University
Roosevelt University
Temple University
Texas A&M University-Corpus Christi
University of Alabama
University of California Berkely
University of Colorado - Denver
The University of Iowa
University of South Carolina
University of Utah
Wayne State University

Sarah B. Clough

Consultant

Education:	Cornell College, B.Mus. Boston University, M.S.
Residence:	Lisbon, Iowa

Experience

Previously at Marts&Lundy for four years, Sarah rejoined the firm in 2020. Her unique background fuses philanthropy, relationship management, data analysis, process improvement, strategic planning, and change management. With 15 years of advancement experience, Sarah has partnered with more than 60 clients to design successful engagement and fundraising initiatives.

As Vice President for a national thought-leader on integrated marketing, Sarah partnered with higher education institutions to position their brands to differentiate themselves from competitors, develop strategies to generate interest from target audiences, and market programs in ways that positively impact outcomes.

Prior to her original tenure at Marts&Lundy, Sarah was Prospect Management Analyst for the University of Iowa Foundation where she focused on prospect strategies during a billion-dollar campaign, partnering with colleagues to purposefully move prospects through the fundraising cycle using her expertise in prospect management, policy development, high-quality reporting, interactive visualizations, and cross-departmental collaboration. She also served as Research Administrator for The Albert and Jessie Danielsen Institute at Boston University.

Sarah is an active volunteer and has served on several boards, including the Apra Great Plains board of directors. Sarah is a volunteer member of her local rural ambulance service as a nationally certified Advanced EMT and a founding member of the service's Volunteer Association.

Representative List of Clients Served

Baylor University
Emporia State University
Florida International University
Louisiana State University
Michigan State University
Nanyang Technological University
Northern Illinois University
Oklahoma City University
San Jose State University
Trine University
University of California, Berkeley
University of Illinois Foundation
University of Kentucky
University of Maryland, Baltimore County
University of Nevada, Las Vegas, UNLV Foundation
University of Oklahoma
University of Pittsburgh
University of Richmond
University of South Carolina
University of Utah
University of Wisconsin-Milwaukee
Wayne State University

Mark Kelleher

Consulting Partner

Education:	Saint Anselm College, B.A. Boston University, M.S
Residence:	San Francisco, CA

Experience

Mark joined Marts&Lundy in 2021 as a consulting partner, having worked with members of the firm on various initiatives for several decades. After more than 30 years, Mark continues to develop and share expertise in nearly every area of the Advancement field, including strategic assessments and planning; campaign feasibility, planning and management; building out critically-needed development operations such as planned giving, corporate and foundation relations; donor relations, and prospect management; providing guidance on the intersection of fundraisers' needs for effective CRM, accountability systems and advancement services; as well as board development and leadership giving.

Prior to consulting, Mark helped launch and expand a new development office at San Francisco State University, where he, as Associate Vice President, planned and co-directed a successful $150 million campaign, the University's first. Earlier in his career, Mark worked on campaigns at University of California San Francisco medical campuses, University of California Berkeley, Harvard Law School, and Boston University increasingly specializing on developing foundation and industry support. He also developed new fundraising initiatives with most of these universities, especially to help grow programs focused on engaging the community for research, and student and faculty professional development opportunities.

In addition to serving on multiple boards in San Francisco where he resides, he co-launched Strut, a combined community center and health clinic in his neighborhood, and volunteers with local political campaigns. Mark is a mayoral-appointed member of the San Francisco Human Rights Commission. Raised near Boston, Mark maintains strong family ties in the Northeast, across the country and in Ireland, where he has dual citizenship. In his free time, Mark travels extensively and is an avid long-distance hiker.

Charles J. Melichar

Consulting Partner
Communications

Education:	Marist College, B.A. University of Maryland
Residence:	Franklin, Tennessee

Experience

A Consulting Partner of Marts&Lundy Communications, Charlie works across the nonprofit spectrum, helping organizations create clear, compelling messaging that inspires engagement and support. Charlie works closely with his clients to get to the essence of the organization's story, particularly around fundraising campaigns. He brings a strategic approach to communication planning and how messages are delivered across platforms, blending analytics and creativity.

Prior to joining Marts&Lundy, Charlie served as Associate Vice Chancellor for Development and Alumni Relations Communications at Vanderbilt University, and Vice President for Public Relations and Communications at Colgate University.

Charlie is regularly invited to speak on topics including strategic communications, social media engagement, building a culture of philanthropy, and crisis communications. An active public speaker and volunteer, Charlie has co-chaired the Council for the Advancement and Support of Education (CASE) annual Campaigns Workshop and served on the CASE Commission on Communications and Marketing.

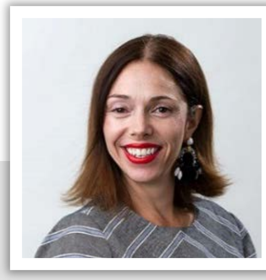
He previously led the News & Information office at the University of Maryland, Baltimore County (UMBC). He began his career at ProfNet, a subsidiary of PR Newswire.

Representative List of Clients Served

Baylor University
Colgate University
Environmental Defense Fund
Fred Hutchinson Cancer Research Center
George Mason University
George Washington University
Harvard Faculty of Arts and Sciences
King's College
Louisiana State University
Michigan Medicine
Michigan State University
National Academies of Sciences, Engineering, and Medicine
National Park Foundation
Northern Illinois University
PBS Foundation
Rice University
Sidwell Friends School
University of California, Berkeley
University of Colorado, Denver
University of Kentucky
University of Virginia Health System

Sarah W. Williams

Vice President for Consulting Engagement & Analytics



Education:	Trinity University, B.A. University of Texas at Austin, M.P.Aff.
Residence:	Austin, Texas

Experience

With Marts&Lundy since 2002, Sarah oversees the work of our consulting groups and our Analytical Solutions team. Her leadership has enabled our firm to seamlessly blend the expertise of our consultants with innovative analytical tools and provide clients with strategic recommendations based on both qualitative and quantitative data.

Sarah was a member of the Marts&Lundy Board of Directors from 2009-2012 and has been a member of the firm's Executive Leadership Team since 2013. She also serves on the board of Giving USA Foundation and, in addition to her work with Marts&Lundy clients, she is a Fundraising Operations Task Force Member and Adjunct Instructor at Rice University's Center for Philanthropy and Nonprofit Leadership.

Her previous experience includes work as a strategic communications and research consultant with Shipley & Associates, Inc. and as a special projects consultant with the Livestrong Foundation. Sarah also has been an AmeriCorps volunteer and a reporter/researcher for the Congressional Quarterly.

Representative List of Clients Served

Boston College
Bucknell University
California Institute of Technology
College of the Holy Cross
Creighton University
Deerfield Academy
Environmental Defense Fund
Fox Chase Cancer Center
George Mason University
George Washington's Mount Vernon
Imperial College, London
Memorial Sloan-Kettering Cancer Center
Michigan State University
Mills College
Morgan State University
Philadelphia Museum of Art
Pomona College
Princeton Day School
Regis University
Rutgers University Foundation
Sewanee University of the South
Smithsonian National Museum of African American History and Culture
Taft School
Texas A&M University
Trust for Public Land
University of Alberta
University of California, Berkeley
University of California, Merced
University of Arkansas for Medical Sciences
University of South Carolina
University of Texas at San Antonio

Expectations

> *Response to RFP Section B. Specific Requirements, 3.c. Outline the expected involvement of university team members.*

- **Internal Assessment:** We will ask Mason to provide requested materials, and then schedule and allow time for interviews with Mason leadership, Advancement and Alumni Relations key staff, and University and Foundation board members. Marts&Lundy will review materials, conduct interviews, and perform the Trends Analysis.
- **Benchmarking study (Peer Comparison):** Mason and Marts&Lundy will mutually determine data points and cohorts to study and recruit institutions. Marts&Lundy will gather and analyze the data.
- **Preliminary Case for Support:** Mason will provide a draft for Marts&Lundy to review and update as we recommend refinements.
- **Capacity Analysis and Unit Yield Analyses**: We will ask Mason to provide recent wealth screening and historical giving data and review top prospects with our team; Marts&Lundy will then conduct the analysis. If unit yield analyses are desired, Marts&Lundy and Mason will mutually determine which units (Colleges/Schools) may be most beneficial to analyze.
- **Key Constituent Interviews:** We will ask Mason to identify participants, provide background details, and schedule interviews. We will work together to develop the questionnaire and draft invitations. Marts&Lundy will review participant background info and conduct interviews.
- **Online Constituent Survey:** We anticipate the Advancement and Alumni Relations team will help identify recipients, provide email addresses, and help develop the survey questionnaire. Marts&Lundy will deploy the survey.
- **Campaign Planning Report and Comprehensive Campaign Strategic Plan:** Marts&Lundy will prepare the report and plan. We will ask the Advancement and Alumni Relations team to respond to information requests, review drafts, and provide feedback.
- **Campaign Counsel:** During Phase III, Marts&Lundy will work with Mason to determine the scope of our counsel. We expect Mason will actively communicate campaign progress and any emerging priorities and Marts&Lundy will provide strategic guidance (including development of the final case and campaign marketing and materials) and support as needed.

References

> *Response to RFP Section B. Specific Requirements, 4. No fewer than three (3) that demonstrates the Offeror's qualifications, preferably from other comparable higher education institutions your company is/has provided services to in the last 3 years and that are similar in size and scope to that which has been described herein. Include a brief description of the project and services provided, name of contact person(s) directly involved in the project/services, contact title, phone number, and email for each reference and indicate the length of service.*

Below we provide project descriptions and contact information for clients with whom our consultants have partnered.

University of South Carolina

Contact: Will Elliott, Senior Associate Vice President for Development and Campaign Director
Phone: (803) 777-3403 Email: willelliott@sc.edu
Length of Service: October 2020 – April 2021

In October 2020, University of South Carolina engaged Marts&Lundy for a campaign planning project that explored the University's internal dynamics, development resources and workflows, fundraising programs and activities, and other key areas. In conjunction with the Campaign Readiness Assessment, Marts&Lundy performed a Capacity Analysis to assess the University's major gift potential. We delivered the Campaign Readiness Assessment report in February 2021 which included detailed staffing recommendations, an implementation plan and timeline, and analyses of key units' major gift potential.

Northern Illinois University Foundation

Contact: Kristin Miller, Director of Campaigns and Planning
Phone: (815) 753-6534 Email: k.miller@niu.edu
Length of Service: February 2021 – ongoing

Northern Illinois University Foundation engaged Marts&Lundy in July 2021 to conduct a Campaign Planning Study. Services included in the study are a high-level assessment of the Foundation's internal campaign readiness, Capacity Analysis, priorities articulation sessions to help inform the Preliminary Case for Support, Key Constituent Interviews, and an Online Constituent Survey. Interviews and the survey are currently in progress. Marts&Lundy will deliver a detailed Campaign Plan in early 2022 and then provide the Foundation with ongoing Strategic Campaign Counsel. We are currently launching a multi-component campaign training program for campus leaders.

Florida International University

Contact: Linda Curiel-Menage; Assistant Vice President, Campaign Planning & Communications
Phone: (305) 348-7952 Email: lcuriel@fiu.edu
Length of Service: 2014 – ongoing

Florida International University initially engaged Marts&Lundy in 2014 to conduct an extensive program assessment with donor analytics in preparation for their comprehensive campaign. They used the results of our assessment and analytics to develop strategies for their $750 million campaign and are building on the communications collateral developed by our Communications group. Marts&Lundy has provided ongoing counsel throughout FIU's successful campaign, and we are currently engaged in a comprehensive project to expand alumni engagement. Services included in this project include a Situational Analysis, an Alumni Yield Analysis, a Survey to 209,000+ FIU alumni, Alumni Communications messaging framework, and ongoing counsel.

Experience

> *Response to RFP Section B. Specific Requirements, 5. Indicate the experience your firm has in the requested services as outlined in Section XI. Statement of Needs. Describe any additional experience that would substantiate and enhance the qualifications of your firm in regard to the performance of a contract resulting from this solicitation.*

Our Capabilities

To help our higher education clients advance their missions, Marts&Lundy offers a broad range of services; the following is an overview.

Campaign Planning Built on our more than 95 years of experience in campaign planning, Marts&Lundy has developed a unique, multi-dimensional approach to campaign planning that addresses both external conditions and internal resources through a combination of personal interviews, predictive data analytics, and program evaluation. This integrated strategy enhances our core services as fundraising counsel and underscores the importance of cohesion to campaign planning. We also offer ongoing campaign counsel, to work hand-in-hand with clients and help ensure our recommendations get traction to catalyze fundraising performance.

Transformational Gifts Marts&Lundy has extensive experience building successful strategies for transformational gifts — gifts of $10 million and more. In addition to helping institutions develop targeted cultivation and solicitation strategies for specific prospects, we provide counsel to clients as they broadly work with donors at the highest levels and develop programs that appeal to such donors.

Data Analytics Analytics are now recognized as a core element of effective fundraising planning, due in large part to innovations pioneered by Marts&Lundy. For more than a decade, our Analytical Solutions team has offered a range of solutions that utilize data to produce actionable information to drive strategy. Further, our firm's unmatched years in the field have allowed us to examine the accuracy of our work over time, ensuring our analyses are producing effective results.

Communications Over the last 15 years, Marts&Lundy has built a Communications group anchored by a full range of services: communications planning and assessment, case statements, campaign messaging, creative concept and branding, social media, website production, magazines, communications training, and more. A number of our partnerships have helped clients win awards from Council for Advancement and Support of Education (CASE). Each team member has decades of nonprofit experience and is able to see communications through the eyes of donors.

Prospect Management A comprehensive prospect management program provides a clear and accessible organization-wide strategy for building, advancing, and managing relationships with constituents. A well-developed system can be the difference between moderate performance and exceptional accomplishments. Marts&Lundy's consultants are experienced in assessing the strengths and challenges of prospect management programs and providing comprehensive solutions to meet aspirational goals.

Training and Talent Development Well-trained staff and volunteers are key to the success of any campaign, and indeed to an overall development program. We offer programs designed to fit each client's needs. This can include fundraising training for development staff, faculty, administrators, and trustees; retention strategies for exceptional staff; and professional development to grow the next generation of leaders.

Annual Giving The best annual giving programs engage constituents in the institution's efforts, use analytics to identify the best tactics for securing philanthropic support, and build sustainable giving relationships that feed the major gift pipeline. Our annual giving counsel involves taking the long view — we help our clients answer challenging questions, build on the institution's strengths, and address any weaknesses. Our annual giving services combine a creative application of experience and data analysis for each client's unique circumstances.

Governance and Leadership The work of universities is increasingly complex, and institutional leaders and their boards are challenged to become even more strategic and skilled. Our consultants work in partnership with senior administrators and trustees to help institutions respond to the challenges they face in a rapidly changing environment. As a firm, we know what has worked well in the past but, more importantly, we know what is working well today and we can help our clients plan for a successful future.

Alumni Relations Alumni are essential members of an educational community, and universities have a responsibility to cultivate and support their alumni for a lifetime. Marts&Lundy brings extensive experience in all phases of alumni engagement and giving. We work closely with our higher education clients to develop effective alumni engagement programs and find solutions that optimize volunteerism, energize the alumni base, and enhance fundraising.

Our Firm's Competitive Distinctions

For this engagement, we will draw on our decades of experience to recommend the best practices in fundraising as they apply to Mason's situation and unique needs. The distinctive skills and expertise we will bring to this project include, but are not limited to:

- ✓ Extensive knowledge about higher education philanthropy, a deep understanding of the unique opportunities and challenges facing R1 public research universities, and a broad perspective of the philanthropic landscape — in Virginia, across the country, and around the world.
- ✓ A highly collaborative approach where we will foster open communication, incorporate a variety of views, and develop recommended action items built on the input of multiple stakeholders.
- ✓ Knowledge of how to help institutions explore the impact of different initiatives and help stimulate thinking on "big ideas" with transformational impact and potential.
- ✓ A deep and talented communications team with a special focus on campaign communications and a prospective donor audience.
- ✓ Skills in analyzing and synthesizing information from a range of data, reports, and interviews.
- ✓ Knowledge about complex organizational structures.
- ✓ Insight into the latest innovations in advancement programs for universities and expertise in all the major areas needed in today's competitive marketplace: strategic program planning, transformational giving, predictive analytics, communications, and more.
- ✓ Broad experience beyond fundraising that addresses the long-range needs of public research universities: strategic planning, board development, institutional reorganization, and more.
- ✓ A seasoned team of higher education philanthropy professionals with decades of experience helping institutions—as advancement leaders and consultants—articulate strategy, execute impactful programs, and mold teams.

Proposed Pricing

Estimated Investment

> *Response to RFP Section B. Specific Requirements, 6, para 1. Identify all costs to perform the services described in section XI. Statement of Needs. Costs for each phase must be outlined separately. For each phase submit a fully detailed/itemized budget including estimated staff hours and costs and any non-labor expenses, such as travel and incidentals, necessary to accomplish the tasks outlined in the Statement of Needs. Any contract awarded as a result of this solicitation shall be all-cost inclusive; no additional monies will be paid for items excluded from the proposal.*

For the services described in this proposal, the fees are estimated as follows. These fees include the allocation of **Penelepe Hunt**, **Sarah Clough, Mark Kelleher**, **Charlie Melichar**, our **Analytical**

Solutions group, and an **associate consultant** (to be assigned at a later date) to assist with project management.

Note that the fees for analytical services (Trends Analysis, Capacity Analysis, Yield Analysis Breakouts, Benchmarking Study, and Online Constituent Survey), Preliminary Case for Support, and the retainer carry a fixed fee because the amount of time required can vary significantly. We have found this approach to be best for helping clients project and manage costs.

Phase I: Internal Campaign Readiness Assessment **Phase I Total = $141,445 - $164,695**

Phase I Service	Personnel	Est. # of Hours	Rate	Total
Internal Assessment	Hunt	24 hours	$475/hr	$11,400
	Clough	24 hours	$475/hr	$11,400
	Kelleher	40 hours	$380/hr	$15,200
	Melichar	24 hours	$475/hr	$11,400
	Associate Consultant (TBA)	56 hours	$332/hr	$18,620
Trends Analysis	AS Team Member	8 hours	*N/A, fixed*	$3,800
			Total Internal Assessment	**$71,820**
Benchmarking Study	Williams	1 hour	*N/A, fixed*	----
	Consultant *(AS Team Member)*	12-60 hours	*N/A, fixed*	----
			Total Benchmarking Study	**$6,000 - $19,000**
Preliminary Case for Support	Melichar	48 hours	*N/A, fixed*	----
			Total Development of Preliminary Case for Support	**$20,250**
Campaign Readiness Report	Hunt	18 hours	$475/hr	$8,550
	Clough	20 hours	$475/hr	$9,120
	Kelleher	20 hours	$380/hr	$7,980
	Associate Consultant (TBA)	30 hours	$332/hr	$9,975
			Total Campaign Readiness Report	**$35,625**
Monthly Retainer	Monthly retainer covers ad hoc support by all team members		*$3,000/ month*	----
			Total Retainer (6 months)	**$18,000**

Phase II: Campaign Planning (Feasibility) Study **Phase II Total = $165,740**

Phase II Service	Personnel	Est. # of Hours	Rate	Total
Capacity Analysis	Williams	20 hours	*N/A, fixed*	----
	AS Team Member	40 hours	*N/A fixed*	----
Total Capacity and Staffing Analysis *Optional Unit Yield Analysis would be charged a fixed fee of $10,000 per unit*				**$28,000**
Key Constituent Interviews	Hunt	12 hours	$475/hr	$5,700
	Clough	24 hours	$475/hr	$11,400
	Kelleher	16 hours	$380/hr	$6,080
	Associate Consultant (TBA)	64 hours	$332/hr	$21,280
Total Key Constituent Interviews (40 interviews)				**$44,460**
Online Constituent Survey	Williams	8 hours	*N/A, fixed*	----
	AS Team Member	30 hours	*N/A, fixed*	----
Total Online Constituent Survey (15,000 surveys)				**$16,000**
Campaign Planning Report and Presentation	Hunt	16 hours	$475/hr	$7,600
	Clough	24 hours	$475/hr	$9,500
	Kelleher	16 hours	$380/hr	$6,080
	Associate Consultant (TBA)	32 hours	$332/hr	$10,640
Total Campaign Planning Report and Presentation				**$33,820**
Comprehensive Campaign Strategic Plan	Hunt	12 hours	$475/hr	$5,700
	Clough	12 hours	$475/hr	$5,700
	Kelleher	16 hours	$380/hr	$6,080
	Associate Consultant (TBA)	24 hours	$332/hr	$7,980
Total Comprehensive Campaign Strategic Plan				**$25,460**
Monthly Retainer	Monthly retainer covers ad hoc support by all team members		*$3,000/ month*	----
Total Retainer (6 months)				**$18,000**

Phase III: Campaign Counsel

Phase III Service	Personnel	Est. # of Hours	Rate	Total
Ongoing Counsel: Monthly Retainer	Monthly retainer covers ad hoc support by all team members		*$3,000/ month*	----
			Total Retainer (12 months)	**$36,000**
Training Workshops			*N/A, fixed*	----
			Total Training Workshops	**$4,000/ workshop**
Ongoing Counsel: Intensive Support	Hunt (12 months)	48 hours	$475/hr	$22,800
	Clough (12 months)	96 hours	$475/hr	$45,600
	Associate Consultant (TBA)	96 hours	$332/hr	$31,920
			Total Intensive Support	**$136,320**
Campaign Communications Plan, Leadership Phase Case for Support, Campaign Marketing & Materials			*TBD*	----
Because case for support development and the creation of campaign collateral materials is highly customized, we will need to wait until your needs and the scope of these services are better understood before providing a fee estimate for these services				

Marts&Lundy has built a consulting model that pulls from our deep experience in philanthropic strategy and our culture of innovation, resulting in solutions for clients that can be deployed faster than ever, no matter the location. We are committed to the speed and efficiency that comes with virtual consulting, saving precious time in the process, reserving our in-person meetings for key moments in our client relationships. We have seen remarkable results over the past year with this approach, and we are committed to carrying it forward as a core element of our consulting strategy and our commitment to reducing our carbon footprint.

As such, we will work with you to determine if and when on-site visits are needed. If in-person visits are desired, our estimated travel expenses (airfare, ground transportation, lodging, and meals) for Phases I and II will be **$18,000**. Every attempt will be made to minimize travel costs.

Hourly Rates

> *Response to RFP Section B. Specific Requirements, 6, para 2. In addition, provide hourly rates for services offered by your firm or personnel contracted on an hourly basis for other Mason departments that may need similar services during the period of the resulting contract. Please note that hourly rates will not be used for the phases outlined in section XI. Statement of Needs.*

Marts&Lundy will offer other Mason departments the same hourly rates as listed above in our proposed fee breakdown.

Additional Requirements

> *Response to RFP Section B. Specific Requirements, 7. In your proposal response please address the following:*
> *a. Are you and/or your subcontractor currently involved in litigation with any party?*
> *b. Please list any investigation or action from any state, local, federal or other regulatory body (OSHA, IRS, DOL, etc.) related to your firm or any subcontractor in the last three years.*
> *c. Please list all lawsuits that involved your firm or any subcontractor in the last three years.*

- Neither Marts&Lundy nor our consulting partners are currently involved in litigation with any party.
- Neither Marts&Lundy nor our consulting partners have any investigation or action from any regulatory body related to our firm in the last three years.
- Neither Marts&Lundy nor our consulting partners have been involved in any lawsuits in the last three years.

In Closing

At Marts&Lundy, our number one goal is to help each of our clients reach and sustain their philanthropic potential and thereby fulfill their missions. Given George Mason University's rich history and traditions, strong support, and thoughtful approach to fundraising, we believe that there is opportunity to attract higher levels of philanthropic support. We welcome the opportunity to help you tap into the University's full potential and make a real difference in your fundraising results. Thank you again for this opportunity to submit a proposal.

Appendix

The following materials are provided in support of our proposal:

- Signed RFP cover page
- Attachment A, Small Business Subcontracting Plan
- Marts&Lundy Report: Capacity Analysis Continues to Prove Accurate
- List of Marts&Lundy's Current and Recent Higher Education Clients

Purchasing Department
4400 University Drive, Mailstop 3C5
Fairfax, VA 22030
Voice: 703.993.2580 | Fax: 703.993.2589
http://fiscal.gmu.edu/purchasing/

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: Marts & Lundy, Inc.	Date: November 17, 2021
DBA: Marts & Lundy, Inc.	
Address: 160 Chubb Avenue, Suite 303	By: [signature]
Lyndhurst, NJ 07071	Signature
FEI/FIN No. 22-2328092	Name: Philippe G. Hills
Fax No. (201) 460-0680	Title: President & CEO, Senior Consultant & Principal
Email: info@martsandlundy.com	Telephone No. (201) 460-1660

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

SWaM Certification Number: N/A

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.

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: Marts & Lundy, Inc.

Preparer Name: Nikita Graham **Date:** November 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: N/A Certification Date: __________

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

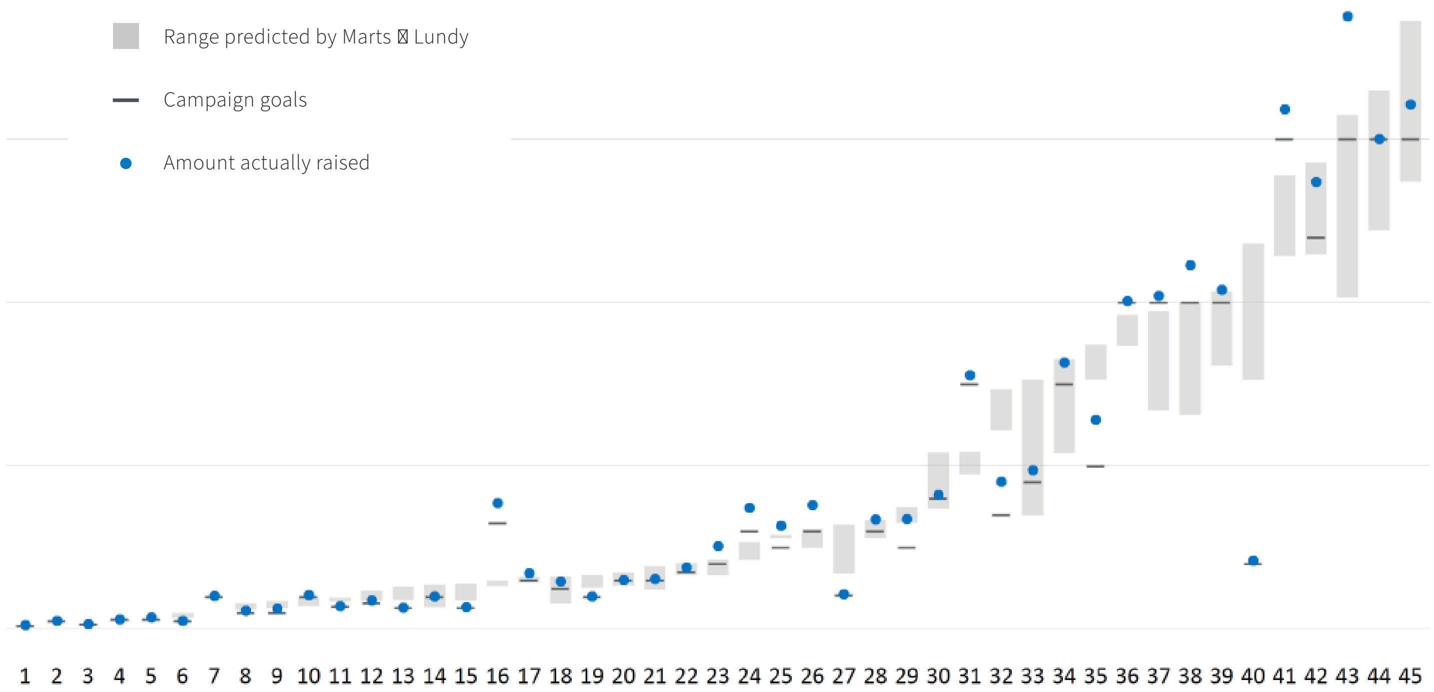
Company Name: __________ SBSD Cert #: N/A
Contact Name: Mark Kelleher SBSD Certification: N/A
Contact Phone: (415) 235-8426 Contact Email: kelleher@martsandlundy.com
Value % or $ (Initial Term): 9 percent Contact Address: San Francisco, CA
Description of Work: Mark will serve as co-counsel, conducting interviews and contributing to strategy development.

Subcontract #2

Company Name: __________ SBSD Cert #: N/A
Contact Name: Charlie J. Melichar SBSD Certification: N/A
Contact Phone: (615) 585-4013 Contact Email: melichar@martsandlundy.com
Value % or $ (Initial Term): 7 percent Contact Address: Franklin, TN
Description of Work: Charlie will lead the assessment of Mason's marketing and communications, work with Mason to ensure the preliminary case is ready for external testing, and finalize the leadership phase case statement and campaign marketing and communications.

Capacity Analysis Continues to Prove Accurate

Marts & Lundy examined the campaign success of clients who used the Capacity Analysis service by comparing campaign goals and amounts raised to fundraising projections provided by the Marts & Lundy Analytical Solutions team. The data for these 45 campaigns from across the nonprofit sector suggests that the Capacity Analysis service accurately predicts campaign capacity: all campaigns met their goals and two-thirds of campaigns finished with totals at or above the Marts & Lundy forecasted range. On average, campaigns with goals set below the forecasted range overran their goal to a greater extent than those setting goals within the forecasted range, suggesting that they may have undervalued their full potential in selecting their goal. Marts & Lundy's Capacity Analysis helps organizations aim high and staff appropriately in the run up to major fundraising campaigns.



Note: All cases in which the campaign was concluded and complete campaign data was available were included in this analysis.

Higher Education

Our current and recent clients

The 12th Man Foundation
Adelphi University
Association of Rice Alumni
Auburn University
Azusa Pacific University
Ball State University Foundation
Baylor University
Belmont Abbey College
Bentley University
Bethel University
Biola University
Bishop's University- Canada
Boston University
Bradley University
Brandon University- Canada
Butler University
California Institute of Technology
California State University, Fresno
California State University, Fullerton
California State University, Long Beach
Calvin University
Carleton University- Canada
Center for Advanced Study in the Behavioral Sciences
CETYS Universidad- Mexico
Charles Darwin University- Australia
Chicago State University
Claremont Graduate University
Clemson Alumni Association
College of the Holy Cross
Cornell University
Cranbrook Institutions
CUNY Brooklyn College Foundation
Curry College
Curtin University- Australia
DePaul University
Duke University
Earlham College
East Stroudsburg University
Edgewood College
Elon University
Emporia State University Foundation
Eugenio Maria de Hostos Community College
Fairleigh Dickinson University
Felician University
Florida International University
Florida State University
Franciscan University of Steubenville
George Mason University, College of Visual and Performing Arts
George Mason University, School of Business
George Mason University Foundation, Inc.
The George Washington University
Gonzaga University
Goodenough College- United Kingdom
Hampden-Sydney College
Indiana University of Pennsylvania
INSEAD- France
Iona College
Iowa State University Foundation
Kansas State University Foundation
Kettering University
King's Business School-United Kingdom
King's College
King's College London- United Kingdom
La Trobe University- Australia
Lebanon Valley College
Lehigh University
London Business School- United Kingdom
Louisiana State University
Loyola University Chicago
Lutheran School of Theology of Chicago
MacEwan University- Canada
Mathematical Sciences Research Institute
McDaniel College
Melbourne Law School- Australia
Metropolitan State University of Denver
Miami Dade College
Michigan State University
Montana Tech Foundation
Moravian College
Morehouse College
Nanyang Technological University- Singapore
National University of Singapore
Neumann University
New England College
Newcastle University- United Kingdom
Northern Arizona University
Notre Dame of Maryland University
Ohio University Alumni Association
Oklahoma State University Foundation
The Ontario College of Art and Design University- Canada
Oxford Brookes University- United Kingdom
Point Loma Nazarene University
Pomona College

Purchase College, State University of New York
Queen’s University- Canada
Red River College- Canada
Regis University
Rice University
Roosevelt University
The Royal Academy of Engineering- United Kingdom
Royal College of Music- United Kingdom
Saint Joseph’s University
Saint Mary’s University of Minnesota
Salem State University
San Diego State University
San Jose State University
Scholars at Risk Network, New York University
Seattle Pacific University
Seneca College of Applied Arts
and Technology- Canada
Seton Hill University
Southern Methodist University
Southwest College of Naturopathic Medicine
Springfield College
St Andrew’s College,
University of Sydney- Australia
St George’s, University of London- United Kingdom
St. John Fisher College
St Paul’s College, University of Sydney- Australia
Stetson University
Stockholm School of Economics- Sweden
Swarthmore College
Texas A&M University
Texas A&M University, Corpus Christi
Texas Christian University
Thomas Aquinas College
Towson State University
Trine University
Trinity College, Cambridge- United Kingdom
Tufts University
Tulane University
Union College
University at Buffalo
University of Aberdeen- United Kingdom
University of Alabama at Birmingham
The University of Arizona Foundation
University of Arkansas at Fort Smith
University of California, Office of the President
University of California, Berkeley
University of California, Davis
University of California, Irvine
University of California, Riverside
University of California, San Diego
University of California, San Francisco
University of California, Santa Barbara
University of Chicago
University of Cincinnati Foundation
University of Colorado System
University of Denver
University of Evansville
University of Exeter- United Kingdom
University of Florida Foundation, Inc.
University of Glasgow- United Kingdon
University of Hawaii Foundation
University of Illinois
University of Iowa
University of Kentucky
University of Leeds- United Kingdom
University of Maryland Alumni Association
University of Maryland, Baltimore County
The University of Melbourne- Australia
University of Miami
University of Missouri
University of Nevada, Las Vegas
University of New England
University of New Mexico
The University of North Carolina, Greensboro
University of North Dakota Alumni Association
University of Northwestern
The University of Oklahoma
University of Puget Sound
University of Reading- United Kingdom
University of Rochester
University of South Carolina
Univeristy of Southern California
University of Southern Indiana
University of Southern Mississippi Alumni Association
University of Southern Mississippi Foundation
University of St Andrews- United Kingdom
University of St. Thomas
University of Technology Sydney- Australia
University of Utah
University of Wisconsin-Milwaukee
Upper Iowa University
Virginia Commonwealth Engineering Foundation
Virginia Commonwealth University
Virginia Commonwealth University,
School of Business Foundation
The Virginia Foundation for Community
College Education
Wake Forest University- School of Business
Wartburg Theological Seminary
Washington University in St. Louis
Wayne State University
Weber State University
Webster University
West Chester University Foundation
Westfield State University
Wheaton College, IL
Yale Divinity School
Yale University