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STANDARD CONTRACT

GMU-1859-23

This Contract entered on this 2nd day of January, 2024 (Effective Date) by Accenture, LLP hereinafter called “Contractor” (located at 800 North Glebe Rd., Suite 700, Arlington, VA 22203) and George Mason University hereinafter called “Mason,” or “University”.

- I. WITNESSETH** that the Contractor and Mason, in consideration of the mutual covenants, promises and agreement herein contained, agree as follows:
- II. SCOPE OF CONTRACT:** The Contractor shall provide consulting services/solution to support Office of Enrollment Management, Undergraduate and Graduate Admissions, Graduate Education, Undergraduate Education, and University Life creation of an Optimal Customer Relationship Management (CRM) system for George Mason University as set forth in the Contract documents.
- III. PERIOD OF CONTRACT:** The Effective Date through February 28, 2026 (“The Initial Term”), with eight (8) successive one-year renewal options.
- IV. THE CONTRACT DOCUMENTS SHALL CONSIST OF (In order of precedence):**
- A. This signed Contract;
 - B. Data Security Addendum (attached);
 - C. Negotiation Responses dated 7/27/2023, 8/11/2023, 9/13/2023, 10/11/2023, 10/20/2023, (attached);
 - D. Contractor’s proposal addendum dated 10/30/2023 (attached)
 - E. RFP No. GMU-1859-23, in its entirety (attached);
 - F. Contractor’s proposal dated April 28, 2023 (attached).
- V. PRICE SCHEDULE:** The services will be delivered on a firm-fixed-price basis. The maximum possible price Mason will pay Contractor is **\$8,749,811.00**. The Contractor has estimated 93,494 hours to complete all the services and deliverables under the Contract. At regular intervals (e.g., completion of Blueprint Validation), Mason and The Contractor will assess the requested scope against the initially planned scope and resolve any discrepancies. The Contractor shall complete all services and deliverables at the fixed-firm-price (defined below) and in accordance with the project schedule, even if any of the actual hours for each role or the overall project exceed the estimated hours or the overall cost exceeds the fixed-firm price. In the event Mason and the contractor jointly identify a change in deliverables, then a Change Order would apply. With the exception of travel, approved by Mason, in writing, in accordance with Mason per diems, pricing specified in this section represents the complete list of charges from the Contractor. No additional charges of any type for the services and deliverables indicated in this Contract shall be accepted. This project is being executed on a ‘Waterfall with Iterative Build’ process, which replaces all usage of the word Agile in the Contractors previously provided documentation.
- Firm-Fixed-Price Contracts Description
Firm Fixed Price represents an agreed price from the Contractor for delivering an agreed scope to Mason.

#	Role	Position Title	Estimated Hours	Initial Rates	Initial Fees	Partnership Discounted Rates	Partnership Discounted Fees
1	Management Team	Onshore Project Executive/ Director	133	\$295	\$39,235	\$200	\$26,600
2		Offshore Project Executive/ Director	194	\$50	\$9,700	\$50	\$9,700
3		Onshore Project Manager	3,879	\$360	\$1,396,440	\$210	\$814,590
4		Offshore Project Manager	4,912	\$50	\$245,600	\$50	\$245,600
5	Functional/ Technical Lead Team	Functional Lead	2,511	\$250	\$627,750	\$145	\$364,095
6		Technical Lead	3,645	\$250	\$911,250	\$145	\$528,525
7		Organizational Change Management/ Training Lead	10,703	\$300	\$3,210,900	\$165	\$1,765,995
8		Communications & Marketing Lead	6,954	\$250	\$1,738,500	\$145	\$1,008,330
9		Testing Lead	6,919	\$35	\$242,165	\$35	\$242,165
10		Integration/ Interoperability Lead	6,869	\$265	\$1,820,285	\$154	\$1,057,826
11		Chief Architect	707	\$265	\$187,355	\$155	\$109,585
12		Security Lead	171	\$265	\$45,315	\$155	\$26,505
13	Technical Team	Onshore Engineers	331	\$200	\$66,200	\$110	\$36,410
14		Offshore Engineers	4,021	\$35	\$140,735	\$35	\$140,735

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#	Role	Position Title	Estimated Hours	Initial Rates	Initial Fees	Partnership Discounted Rates	Partnership Discounted Fees
15		Onshore Analysts	3,007	\$175	\$526,225	\$90	\$270,630
16		Offshore Analysts	748	\$35	\$26,180	\$35	\$26,180
17		Developers	20,316	\$160	\$3,250,560	\$85	\$1,726,860
18		Testers	17,474	\$20	\$349,480	\$20	\$349,480
		Sub-Total	93,494		\$14,833,875		\$8,749,811

Estimated hours align to the per-month resource schedule provided in the Contractor's Proposal.

Change Order Rates

#	Role	Position Title	Change Pool Rates	Further Changes Rates
1	Management Team	Onshore Project Executive/ Director	\$289	\$295
2		Offshore Project Executive/ Director	\$50	\$50
3		Onshore Project Manager	\$353	\$360
4		Offshore Project Manager	\$50	\$50
5	Functional/ Technical Lead Team	Functional Lead	\$245	\$250
6		Technical Lead	\$245	\$250
7		Organizational Change Management/ Training Lead	\$294	\$300
8		Communications & Marketing Lead	\$245	\$250
9		Testing Lead	\$35	\$35
10		Integration/ Interoperability Lead	\$260	\$265
11		Chief Architect	\$260	\$265
12		Security Lead	\$260	\$265
13	Technical Team	Onshore Engineers	\$196	\$200
14		Offshore Engineers	\$35	\$35
15		Onshore Analysts	\$171	\$175
16		Offshore Analysts	\$35	\$35
17		Developers	\$157	\$160
18		Testers	\$20	\$20

Change Pool: Mutually agreed Contract changes less than 9,350 hours in aggregate, and/or with a duration that does not extend beyond the initial term of the Contract and/or that is closely related to the work to the Scope defined in II above will utilize the Change Pool Rates in the above table.

Further Changes: Mutually agreed Contract changes greater than 9,350 hours in aggregate, and/or with a duration that extends beyond the initial term of the Contract Term and/or that is not closely related to the work to the Scope defined in II above will utilize the Further Changes Rates in the above table.

The Parties may mutually agree, during any Change Order, to lower Change Order Rates.

Rates will change according to the following Cost Of Living Allowance (COLA) Treatment table.

Contract Year	COLA Treatment
Year 1 & 2	0%
Years 3 to 5	2% per year
Years 6 to 7	Onshore: 2% per year Offshore: Increase not to exceed the Hewitt Index (Aon Hewitt Salary-Increase-and-Turnover-Study) per year
Years 8 onwards	Increase not to exceed the Hewitt Index (Aon Hewitt Salary-Increase-and-Turnover-Study) per year

Expected Mason commitment of resources is detailed in the Contractor's Proposal Addendum, dated 10/30/23, in Figures 18a and 18b.

VI. CONTRACT ADMINISTRATION: Matthew Schaefer shall serve as Contract Administrator for this Contract and shall use all powers under the Contract to enforce its faithful performance. The Contract Administrator shall determine the amount, quality and acceptability of work and shall decide all other questions in connection with the work. All direction and order from Mason shall be transmitted through the Contract Administrator, however, the Contract Administrator shall have no authority to approve changes which shall alter the concept or scope or change the basis for compensation.

VII. DELIVERABLE ACCEPTANCE: Mason shall be notified in writing when a deliverable(s) is ready for review and acceptance. Mason will identify any deficiencies in the deliverable or provide written confirmation that Mason considers the deliverable acceptable and complete. Unless otherwise mutually agreed as part of the Deliverable Expectations Document process, or a minimum of 10 (ten) business days notice prior to the planned review process, Mason will review the Contractor's

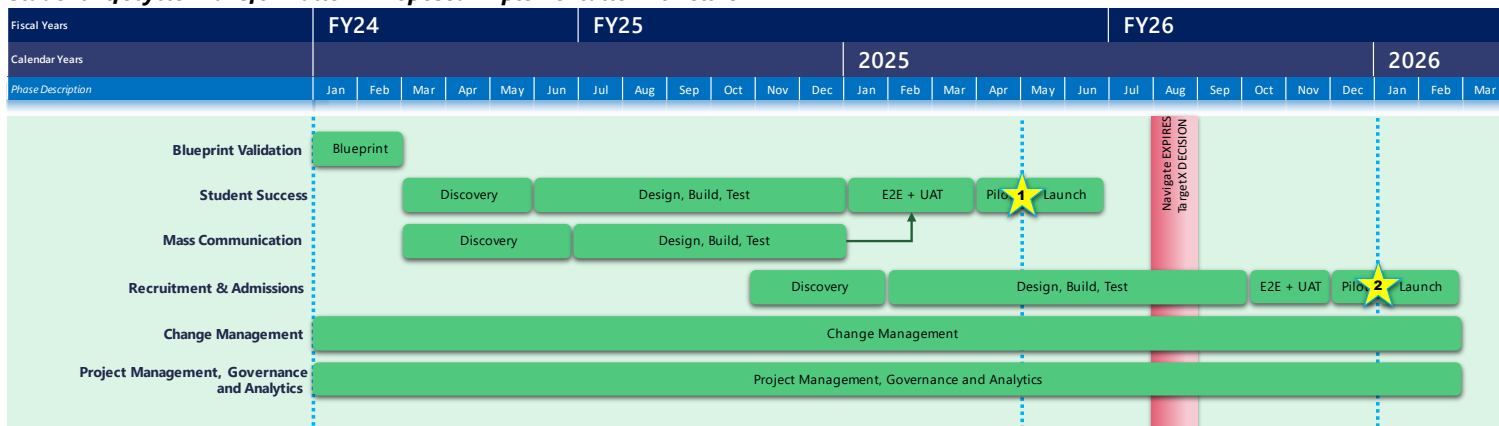
Contractor providing a remedy for any deficiency within 3 (three) business days and Mason re-reviewing within 2 (two) business days. Mason, in its sole discretion, shall determine if a deliverable is acceptable and complete. Failure to complete a deliverable to the satisfaction of Mason shall result in a delay of the respective milestone deliverable payment. Contractor shall continue work activities on subsequent milestones irrespective of deliverable corrective actions.

VIII. METHOD OF PAYMENT: Paymode-X, Net30. <http://www.paymode.com/gmu>. Contractor shall submit invoices directly to acctpay@gmu.edu with a copy to the Contract Administrator. Invoices will be paid Net 30 after goods received, services rendered, at the completion of each milestone and acceptance by Mason, or receipt in Mason's Accounts Payable email box, acctpay@gmu.edu, whichever is later. Invoices must reference a Purchase Order number to be considered valid.

- A. The Contractor shall invoice Mason for each milestone upon delivery and Mason's acceptance of all deliverables associated with such milestone. Contractor shall provide documentation of actual hours expended per named resource and associated fees incurred to meet the associated milestones.
- B. Target Dates may be adjusted by mutual agreement, in writing, between the parties

	Milestone	Description	Est amt payment	% of Total Fees	Target Date
I	Blueprint Validation	End to End Discovery & Student Experience	\$874,981	10%	Feb 29, 2024
II	Change Strategy	E2E Change Strategy: Marketing Collateral, Communications Plan, Training Plan and Website	\$1,749,962	20%	Apr 30, 2024
III	Discovery 1	Student Success: Change Assessment + Comms Plan+ Training Plan	\$1,312,472	15%	May 31, 2024
IV	Discovery 2	Mass Communication Platform: Change Assessment + Comms Plan+ Training Plan	\$1,312,472	15%	Jun 30, 2024
V	Discovery 3	Recruitment & Admissions: Change Assessment, Comms Plan, Training Plan	\$1,312,472	15%	Dec 31, 2024
VI	Release 1	Student Success and Marketing Cloud	\$874,981	10%	April 30, 2025
VII	Release 2	Recruitment and Admissions	\$874,981	10%	Dec 31, 2025
VIII	Training Delivery, Communications & Transition Plan	Training completion for end users and support staff with a communications plan and transition to business operations.	\$437,491	5%	Feb 28, 2026
			\$8,749,811	100%	

Student Lifecycle Transformation– Proposed Implementation Timeline



- C. Deliverables. The table below lists the deliverables and the milestones that the deliverables will be produced in. Each deliverable will have a precursor Deliverable Expectation Document which will document the nature of the deliverable, its planned content, its reviewers and the review and approval process. Deliverable Expectation Documents will be produced during the relevant Blueprint and Discovery activities.

Milestone	Deliverables Impacted
I. Blueprint Validation	Project Schedule Requirements Document(s) Requirements Traceability Plan and Matrix (RTM) Architectural Vision Configuration Management Plan System Traceability Model Design and Development Plan
II. Change Strategy	Change Readiness Assessment (CRA) Change Strategy / Change Management Plan Marketing & Communications Plan Training Plan
III. Discovery 1 - Student Success	The following deliverables will be applicable for Discovery 1/2/3 (Updated) Project Schedule (Updated) Requirements Document(s) Conceptual Design High Level Design (HLD) Solution Detailed Design (SDD) Solution Architecture Design (SAD) Functional and Technical Design Documents Configuration Management Plan Business Use Case(s) Business Rules Documentation User Interface Specification(s) System Security Plan Reports and Forms Design Documents Process Flow Document(s) Glossary of Terms and Acronyms Master Test Plan Data Conversion and Migration Plan Data Dictionary, Data Flow Model(s) and Migration Results
IV. Discovery 2 - Mass Communication Platform	
V. Discovery 3 - Recruitment & Admissions	
VI. Release 1 - Student Success & Mass Communications (Marketing Cloud)	
VII. Release 2 - Recruitment & Admissions	The following deliverables will be applicable for Agile Release 1 and 2 (Updated) Master Test Plan with Results Final Deployment Plan Final Conversion and Migration Results Report UAT Report and Results Defects Log System Acceptance Report
VIII. Training Delivery, Communications & Transition Plan	(Updated) Change Readiness Assessment (CRA) (Updated) Change Strategy / Change Management Plan (Updated) Marketing & Communications Plan (Updated) Training Plan with Materials handoff

IX. GOVERNING RULES: This Contract is governed by the provisions of the Restructured Higher Education Financial and Administrative Operations Act, Chapter 10 (§ [23.1-1000](#) et seq.) of Title 23.1 of the Code of Virginia, and the “*Governing Rules*” and the *Purchasing Manual for Institutions of Higher Education and their Vendors*. Documents may be viewed at: <https://vascupp.org>.

X. CONTRACT PARTICIPATION: It is the intent of this Contract to allow for cooperative procurement. Accordingly, any public body, public or private health or educational institutions, or affiliated corporations may access this Contract if authorized by the Contractor.

Participation in this Contract is strictly voluntary. If authorized by the Contractor, the contract will be extended to the entities indicated above to purchase goods and services in accordance with contract terms. As a separate contractual relationship, the participating entity will place its own orders directly with the Contractor(s) and shall fully and independently administer its use of the contract(s) to include contractual disputes, invoicing and payments without direct administration from the University. No modification of this Contract or execution of a separate agreement is required to participate; however, the participating entity and the Contractor may modify the terms and conditions of the contract to accommodate specific governing laws, regulations, policies, and business goals required by the participating entity. Any such modification will apply solely between the participating entity and the Contractor.

The University may request the Contractor provide semi-annual usage reports for all entities accessing the Contract. The University shall not be held liable for any costs or damages incurred by any other participating entity as a result of any

Use of this Contract does not preclude any participating entity from using other contracts or competitive processes as needed.

XI. STANDARD TERMS AND CONDITIONS:

- A. **APPLICABLE LAW AND CHOICE OF FORUM:** This Contract shall be construed, governed, and interpreted pursuant to the laws of the Commonwealth of Virginia. All disputes arising under this Contract shall be brought before an appropriate court in the Commonwealth of Virginia.
- B. **ANTI-DISCRIMINATION:** By entering into this Contract Contractor certifies to the Commonwealth that they will conform to the provisions of the Federal Civil Rights Act of 1964, as amended, as well as the Virginia Fair Employment Contracting Act of 1975, as amended, where applicable, the Virginians With Disabilities Act, the Americans With Disabilities Act and §§ 9&10 of the *Governing Rules*. If the award is made to a faith-based organization, the organization shall not discriminate against any recipient of goods, services, or disbursements made pursuant to the Contract on the basis of the recipient's religion, religious belief, refusal to participate in a religious practice, or on the basis of race, age, color, gender or national origin and shall be subject to the same rules as other organizations that contract with public bodies to account for the use of the funds provided; however, if the faith-based organization segregates public funds into separate accounts, only the accounts and programs funded with public funds shall be subject to audit by the public body. (*Governing Rules*, § 36).

In every contract over \$10,000 the provisions in 1. and 2. below apply:

1. During the performance of this Contract, the Contractor agrees as follows:
 - a. The Contractor will not discriminate against any employee or applicant for employment because of race, religion, color, sex, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment, except where there is a bona fide occupational qualification reasonably necessary to the normal operation of the Contractor. The Contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this nondiscrimination clause.
 - b. The Contractor, in all solicitations or advertisements for employees placed by or on behalf of the Contractor, will state that such Contractor is an equal opportunity employer.
 - c. Notices, advertisements and solicitations placed in accordance with federal law, rule or regulation shall be deemed sufficient for the purpose of meeting these requirements.
 2. The Contractor will include the provisions of 1. above in every subcontract or purchase order over \$10,000, so that the provisions will be binding upon each subcontractor or Contractor.
- C. **ANTITRUST:** By entering into this Contract, the Contractor conveys, sells, assigns, and transfers to the Commonwealth of Virginia all rights, title and interest in and to all causes of action it may now have or hereafter acquire under the antitrust laws of the United States and the Commonwealth of Virginia, relating to the particular goods or services purchased or acquired by the Commonwealth of Virginia under this Contract.
- D. **ASSIGNMENT:** Neither party will assign or otherwise transfer its rights or obligations under this Contract without both parties' prior written consent. Any attempted assignment, transfer, or delegation without such consent is void.
- E. **AUDIT:** The Contractor shall retain all books, records, and other documents relative to this Contract for five (5) years after final payment, or until audited by the Commonwealth of Virginia, whichever is sooner. The University, its authorized agents, and/or state auditors shall have full access to and the right to examine any of said materials during said period.
- F. **AVAILABILITY OF FUNDS:** It is understood and agreed between the parties herein that the University shall be bound hereunder only to the extent of the funds available or which may hereafter become available for the purpose of this Contract.
- G. **AUTHORIZED SIGNATURES:** The signatory for each Party certifies that he or she is an authorized agent to sign on behalf such Party.

employees (including subcontractors) performing services on any Mason campus must have successfully completed a criminal background check prior to the start of their work assignment/service. As stated in [Administrative Policy Number 2221 – Background Investigations](#), the criminal background investigation will normally include a review of the individual's records to include Social Security Number Search, Credit Report (if related to potential job duties), Criminal Records Search (any misdemeanor convictions and/or felony convictions are reported) in all states in which the employee has lived or worked over the past seven years, and the National Sex Offender Registry. In addition, the Global Watch list (maintained by the Office of Foreign Assets Control of The US Department of Treasury) should be reviewed. Signature on this Contract confirms your compliance with this requirement.

- I. **CANCELLATION OF CONTRACT:** Mason reserves the right to cancel this Contract, without penalty, for any reason, upon 60 days written notice to the Contractor. Upon written notice of cancellation from Mason, Mason shall be fully released from any further obligation under the Contract and Contractor agrees to directly refund all payments, for services not already performed, to Mason, including any pre-paid deposits, within 14 days. Any contract cancellation notice shall not relieve the Contractor of the obligation to deliver and/or perform on all outstanding orders issued prior to the effective date of cancellation. If, for any reason, this Contract is terminated, Mason will pay Contractor for all Services and Deliverables rendered to-date, including a pro-rated portion for Deliverables in progress and expenses incurred prior to the date of termination.
- J. **CHANGES TO THE CONTRACT:** Changes can be made to this Contract in any of the following ways:
1. The parties may agree in writing to modify the scope of this Contract.
 2. Mason may order changes in scope and/or assumptions within the general scope of Contract at any time by written notice to Contractor. Changes within the scope of this Contract include, but are not limited to, things such as services to be performed or material changes or addition of, delivered functionality, budget, milestones., named resource changes, etc. Contractor shall be compensated for any additional costs incurred as the result of such order and shall give Mason a credit for any savings. Said compensation shall be determined by one of the following methods:
 - a. By mutual agreement between the parties in writing; or
 - b. By agreeing upon a price or using the hourly rates set forth in the contract, subject to Mason's right to audit Contractor's records.
 - c. By ordering Contractor to proceed with the work and keep a record of all costs incurred and savings realized. A markup for overhead and profit may be allowed if provided by Contract. The same markup shall be used for determining a decrease in price as the result of savings realized. Contractor shall present Mason with all vouchers and records of expenses incurred and savings realized. Mason shall have the right to audit the records of Contractor as it deems necessary to determine costs or savings. Any claim for an adjustment in price under this provision must be asserted by written notice to Mason within thirty (30) days from the date of receipt of the written order from Mason. If the Parties fail to agree on an amount of adjustment, the question of an increase or decrease in the Contract price or time for performance shall be resolved in accordance with the procedures for resolving disputes provided by the Disputes Clause of this Contract or, if there is none, in accordance with the disputes provisions of the Commonwealth of Virginia Purchasing Manual for Institutions of Higher Education and Their Contractors. Neither the existence of a claim nor a dispute resolution process, litigation or any other provision of this Contract shall excuse the Contractor from promptly complying with the changes ordered by Mason or with the performance of this Contract generally.
- K. **CLAIMS:** Contractual claims, whether for money or other relief, shall be submitted in writing no later than 60 days after final payment. However, written notice of the Contractor's intention to file a claim shall be given at the time of the occurrence or beginning of the work upon which the claim is based. Nothing herein shall preclude a contract from requiring submission of an invoice for final payment within a certain time after completion and acceptance of the work or acceptance of the goods. Pendency of claims shall not delay payment of amounts agreed due in the final payment.
1. The Contractor must submit written claim to:
Chief Procurement Officer
George Mason University
4400 University Drive, MSN 3C5
Fairfax, VA 22030
 2. The Contractor must submit any unresolved claim in writing no later than 60 days after final payment to the Chief Procurement Officer.

3. Upon receiving the written claim, the Chief Procurement Officer will review the written materials relating to the claim and will mail their decision to the Contractor within 60 days after receipt of the claim.
 4. The Contractor may appeal the Chief Procurement Officer's decision in accordance with §55 of the *Governing Rules*.
- L. COLLECTION AND ATTORNEY'S FEES: The Contractor shall pay to Mason any reasonable attorney's fees or collection fees, at the maximum allowable rate permitted under Virginia law, incurred in enforcing this Contract or pursuing and collecting past-due amounts under this Contract.
- M. COMPLIANCE: All goods and services provided to Mason shall be done so in accordance with any and all applicable local, state, federal, and international laws, regulations and/or requirements and any industry standards, including but not limited to: the Family Educational Rights and Privacy Act (FERPA), Health Insurance Portability and Accountability Act (HIPAA) and Health Information Technology for Economic and Clinical Health Act (HITECH), Government Data Collection and Dissemination Practices Act, Gramm-Leach-Bliley Financial Modernization Act (GLB), Payment Card Industry Data Security Standards (PCI-DSS), Americans with Disabilities Act (ADA), and Federal Export Administration Regulations. Any Contractor personnel visiting Mason facilities will comply with all applicable Mason policies regarding access to, use of, and conduct within such facilities. Mason's policies can be found at <https://universitypolicy.gmu.edu/all-policies/> and any facility specific policies can be obtained from the facility manager.
- N. CONFIDENTIALITY OF PERSONALLY IDENTIFIABLE INFORMATION: The Contractor shall ensure that personally identifiable information ("PII") which is defined as any information that by itself or when combined with other information can be connected to a specific person and may include but is not limited to personal identifiers such as name, address, phone, date of birth, Social Security number, student or personal identification numbers, driver's license numbers, state or federal identification numbers, biometric information, religious or political affiliation, non-directory information, and any other information protected by state or federal privacy laws, will be collected and held confidential and in accordance with this agreement, during and following the term of this Contract, and will not be divulged without the individual's and Mason's written consent and only in accordance with federal law or the Code of Virginia.
- O. CONFLICT OF INTEREST: Contractor represents to Mason that its entering into this Contract with Mason and its performance through its agents, officers and employees does not and will not involve, contribute to nor create a conflict of interest prohibited by Virginia State and Local Government Conflict of Interests Act (Va. Code 2.2-3100 *et seq*), the Virginia Ethics in Public Contracting Act (§57 of the *Governing Rules*), the Virginia Governmental Frauds Act (Va. Code 18.2 – 498.1 *et seq*) or any other applicable law or regulation.
- P. CONTINUITY OF SERVICES:
1. The Contractor recognizes that the services under this Contract are vital to Mason and must be continued without interruption and that, upon contract expiration, a successor, either Mason or another contractor, may continue them. The Contractor agrees:
 - a. To exercise its best efforts and cooperation to affect an orderly and efficient transition to a successor;
 - b. To make all Mason owned facilities, equipment, and data available to any successor at an appropriate time prior to the expiration of the contract to facilitate transition to successor; and
 - c. That the University Procurement Officer shall have final authority to resolve disputes related to the transition of the contract from the Contractor to its successor.
 2. The Contractor shall, upon written notice from the Procurement Officer, furnish phase-in/phase-out services for up to ninety (90) days after this Contract expires and shall negotiate in good faith a plan with the successor to execute the phase-in/phase-out services. This plan shall be subject to the Procurement Officer's approval.
 3. The Contractor shall be reimbursed for all reasonable, pre-approved phase-in/phase-out costs (i.e., costs incurred within the agreed period after contract expiration that result from phase-in, phase-out operations). All phase-in/phase-out work fees must be approved by the Procurement Officer in writing prior to commencement of said work.
- Q. DEBARMENT STATUS: As of the Effective Date, the Contractor certifies that it is not currently debarred by the Commonwealth of Virginia from submitting bids or proposals on contracts for the type of services covered by this Contract, nor is the Contractor an agent of any person or entity that is currently so debarred.
- R. DEFAULT: In the case of failure to deliver goods or services in accordance with Contract terms and conditions, Mason, after due oral or written notice, may procure them from other sources and hold Contractor responsible for any resulting additional purchase and administrative costs. This remedy shall be in addition to any other remedies which

- S. **DRUG-FREE WORKPLACE**: Contractor has, and shall have in place during the performance of this Contract, a drug-free workplace policy (DFWP), which it provides in writing to all its employees, vendors, and subcontractors, and which specifically prohibits the following on company premises, during work-related activities, or while conducting company business: the sale, purchase, manufacture, dispensation, distribution possession, or use of any illegal drug under federal law (including marijuana). For purposes of this section, “drug-free workplace” covers all sites at which work is done by Contractor in connection with this Contract.
- T. **ENTIRE CONTRACT**: This Contract constitutes the entire understanding of the Parties with respect to the subject matter herein and supersedes all prior oral or written contracts with respect to the subject matter herein. This Contract can be modified or amended only by a writing signed by all of the Parties.
- U. **EXPORT CONTROL**:
1. **Munitions Items**: If the Contractor is providing any items, data or services under this order that are controlled by the Department of State, Directorate of Defense Trade Controls, International Traffic in Arms Regulations (“ITAR”), or any items, technology or software controlled under the “600 series” classifications of the Bureau of Industry and Security’s Commerce Control List (“CCL”) (collectively, “Munitions Items”), prior to delivery, Contractor must:
 - a. notify Mason (by sending an email to export@gmu.edu), and
 - b. receive written authorization for shipment from Mason’s Director of Export Controls.

The notification provided by the Contractor must include the name of the Mason point of contact, identify and describe each ITAR or CCL-controlled commodity, provide the associated U.S. Munitions List (USML) category number(s) or Export Control Classification Number, and indicate whether or not the determination was reached as a result of a commodity jurisdiction determination, or self-classification process. The Contractor promises that if it fails to obtain the required written pre-authorization approval for shipment to Mason of any Munitions Item, it will reimburse Mason for any fines, legal costs and other fees imposed for any violation of export controls regarding the Munition Item that are reasonably related to the Contractor’s failure to provide notice or obtain Mason’s written pre-authorization.
 2. **Dual-Use Items**: If the Contractor is providing any dual-use items, technology or software under this order that are listed on the CCL in a series other than a “600 series”, Contractor must (i) include the Export Control Classification Number (ECCN) on the packing or other transmittal documentation traveling with the item(s) and, (ii) send a description of the item, its ECCN, and the name of the Mason point of contact to: export@gmu.edu .
- V. **FORCE MAJEURE**: Mason shall be excused from any and all liability for failure or delay in performance of any obligation under this Contract resulting from any cause not within the reasonable control of Mason, which includes but is not limited to acts of God, fire, flood, explosion, earthquake, or other natural forces, war, civil unrest, accident, any strike or labor disturbance, travel restrictions, acts of government, disease, pandemic, or contagion, whether such cause is similar or dissimilar to any of the foregoing. Upon written notification from Mason that such cause has occurred, Contractor agrees to directly refund all payments to Mason, for services not yet performed, including any pre-paid deposits within 14 days.
- W. **FUTURE GOODS AND SERVICES**: Mason reserves the right to have Contractor provide additional goods and/or services that may be required by Mason during the term of this Contract. Any such goods and/or services will be provided by the Contractor under the same pricing, terms and conditions of this Contract. Such additional goods and/or services may include other products, components, accessories, subsystems or related services that are newly introduced during the term of the contract. Such newly introduced additional goods and/or services will be provided to Mason at Favored Customer pricing, terms and conditions.
- X. **IMMIGRATION REFORM AND CONTROL ACT OF 1986**: By entering into this Contract Contractor certifies that they do not and will not during the performance of this Contract employ illegal alien workers or otherwise violate the provisions of the federal Immigration Reform and Control Act of 1986.
- Y. **INDEMNIFICATION**: Contractor agrees to indemnify, defend and hold harmless George Mason University, the Commonwealth of Virginia, its officers, agents, and employees from any claims, damages and actions of any kind or nature, whether at law or in equity, arising from or caused by any infringement of intellectual property rights related to by the Contractor/any services of any kind or nature rendered by the Contractor, provided that such liability is not attributable to the sole negligence of Mason or to the failure of Mason to use the materials, goods, or equipment in the

Z. INDEPENDENT CONTRACTOR: The Contractor is not an employee of Mason, but is engaged as an independent contractor. The Contractor shall indemnify and hold harmless the Commonwealth of Virginia, Mason, and its employees and agents, with respect to all withholding, Social Security, unemployment compensation and all other taxes or amounts of any kind relating to the Contractor's performance of this Contract. Nothing in this Contract shall be construed as authority for the Contractor to make commitments which will bind Mason or to otherwise act on behalf of Mason, except as Mason may expressly authorize in writing.

AA. INFORMATION TECHNOLOGY ACCESS ACT: Computer and network security is of paramount concern at Mason. Mason wants to ensure that computer/network hardware and software does not compromise the security of its IT environment. Contractor agrees to use commercially reasonable measures in connection with any offering your company makes to avoid any known threat to the security of the IT environment at Mason.

All e-learning and information technology developed, purchased, upgraded or renewed by or for the use of Mason shall comply with all applicable University policies, Federal and State laws and regulations including but not limited to Section 508 of the Rehabilitation Act (29 U.S.C. 794d), the Information Technology Access Act, §§2.2-3500 through 2.2-3504 of the Code of Virginia, as amended, and all other regulations promulgated under Title II of The Americans with Disabilities Act which are applicable to all benefits, services, programs, and activities provided by or on behalf of the University. The Contractor shall also comply with the Web Content Accessibility Guidelines (WCAG) 2.0. For more information please visit <http://ati.gmu.edu>, under Policies and Procedures.

BB. INSURANCE: The Contractor shall maintain all insurance necessary with respect to the services provided to Mason. The Contractor further certifies that they will maintain the insurance coverage during the entire term of the Contract and that all insurance is to be placed with insurers with a current reasonable A.M. Best's rating authorized to sell insurance in the Commonwealth of Virginia by the Virginia State Corporation Commission. The Commonwealth of Virginia and Mason shall be named as an additional insured. By requiring such minimum insurance, Mason shall not be deemed or construed to have assessed the risk that may be applicable to the Contractor. The Contractor shall assess its own risks and, if it deems appropriate and/or prudent, maintain higher limits and/or broader coverage. The Contractor is not relieved of any liability or other obligations assumed or pursuant to this Contract by reason of its failure to obtain or maintain insurance in sufficient amounts, duration, or types.

1. Commercial General Liability Insurance in an amount not less than \$1,000,000 per occurrence for bodily injury or property damage, personal injury and advertising injury, products and completed operations coverage;
2. Workers Compensation Insurance in an amount not less than that prescribed by statutory limits; and, as applicable;
3. Commercial Automobile Liability Insurance applicable to bodily injury and property damage, covering owned, non-owned, leased, and hired vehicles in an amount not less than \$1,000,000 per occurrence; and
4. An umbrella/excess policy in an amount not less than five million dollars (\$5,000,000) to apply over and above Commercial General Liability, Employer's Liability, and Commercial Automobile Liability Insurance.

CC. INTELLECTUAL PROPERTY: Contractor warrants and represents that it will not violate or infringe any intellectual property right or any other personal or proprietary right and shall indemnify and hold harmless Mason against any claim of infringement of intellectual property rights which may arise under this Contract.

Unless expressly agreed to the contrary in writing, all goods, products, materials, documents, reports, writings, video images, photographs or papers of any nature including software or computer images prepared or provided by Contractor (or its subcontractors) for Mason will not be disclosed to any other person or entity without the written permission of Mason.

Work Made for Hire. Contractor warrants to Mason that Mason will own all rights, title and interest in any and all intellectual property rights created in the performance or otherwise arising from the Contract and will have full ownership and beneficial use thereof, free and clear of claims of any nature by any third party including, without limitation, copyright or patent infringement claims. Contractor agrees to assign and hereby assigns all rights, title, and interest in any and all intellectual property created in the performance or otherwise arising from the Contract, and will execute any future assignments or other documents needed for Mason to document, register, or otherwise perfect such rights. Notwithstanding the foregoing, for research collaboration pursuant to subcontracts under sponsored research Contracts administered by the University's Office of Sponsored Programs, intellectual property rights will be governed by the terms of the grant or contract to Mason to the extent such grant or contract requires intellectual property terms to apply to subcontractors.

Each Party (or its licensors as applicable) shall retain ownership of its intellectual property rights, including patents, copyright, trade secrets, know-how and other proprietary rights ("IP") which were existing prior to this Contract or developed or licensed outside of this contract.

- DD. NON-DISCRIMINATION: All parties to this Contract agree to not discriminate on the basis of race, color, religion, national origin, sex, pregnancy, childbirth or related medical conditions, age (except where sex or age is a bona fide occupational qualification, marital status or disability).
- EE. NON-EXCLUSIVITY: Nothing herein is intended nor shall be construed as creating any exclusive arrangement with Contractor. This Contract will not restrict or prohibit Mason from acquiring the same or similar goods and/or services from other entities or sources.
- FF. PAYMENT TO SUBCONTRACTORS: The Contractor shall take the following actions upon receiving payment from Mason: (1) pay the subcontractor within seven days for the proportionate share of the total payment received from Mason attributable to the work performed by the subcontractor under that Contract; or (2) notify Mason and subcontractor within seven days, in writing, of its intention to withhold all or a part of the subcontractor's payment with the reason for nonpayment. b. If an individual contractor, provide social security number in order to receive payment. c. If a proprietorship, partnership or corporation provide Federal employer identification number. d. Pay interest to subcontractors on all amounts owed by the Contractor that remain unpaid after seven days following receipt by the Contractor of payment from the Institution for work performed by the subcontractor under that Contract, except for amounts withheld as allowed by prior notification. e. Accrue interest at no more than the rate of one percent per month. f. Include in each of its subcontracts a provision requiring each subcontractor to include or otherwise be subject to the same payment and interest requirements with respect to each lower-tier subcontractor.
- GG. PERSONNEL: The Contractor's named personnel performing services under this contract shall not be removed from the project without the consent of Mason. In the event that a named person is no longer employed by the contractor, the parties shall mutually agree on any replacement.
- HH. PUBLICITY: The Contractor shall receive approval from Mason, in writing, prior to any public statements or press releases. The Contractor shall not use, in its external advertising, marketing programs or promotional efforts, any data, pictures, trademarks or other representation of Mason except on the specific written authorization in advance by Mason's designated representative.
- II. REMEDIES: If the Contractor breaches this Contract, in addition to any other rights or remedies, Mason may terminate this Contract without prior notice.
- JJ. RENEWAL OF CONTRACT: This Contract may be renewed by Mason for eight (8) successive one-year renewal options under the terms and conditions of this Contract. Rate increases will be in accordance with V. PRICE SCHEDULE.
- KK. REPORTING OF CRIMES, ACCIDENTS, FIRES AND OTHER EMERGENCIES: Any Mason Employee, including contracted service providers, who is not a staff member in Counseling and Psychological Services (CAPS) or a pastoral counselor, functioning within the scope of that recognition, is considered a "Campus Security Authority (CSA)." CSAs must promptly report all crimes and other emergencies occurring on or near property owned or controlled by Mason to the Department of Police & Public Safety or local police and fire authorities by dialing 9-1-1. At the request of a victim or survivor, identifying information may be excluded from a report (e.g., names, initials, contact information, etc.). Please visit the following website for more information and training: <http://police.gmu.edu/clery-act-reporting/campus-security-authority-csa/>.
- LL. RESPONSE TO LEGAL ORDERS, DEMANDS, OR REQUESTS FOR DATA: Except as otherwise expressly prohibited by law, Contractor will: i) immediately notify Mason of any subpoenas, warrants, or other legal orders, demands or requests received by Contractor seeking University Data; ii) consult with Mason regarding its response; iii) cooperate with Mason's reasonable requests in connection with efforts by Mason to intervene and quash or modify the legal order, demand or request; and iv) upon Mason's request, provide Mason with a copy of its response.
- If Mason receives a subpoena, warrant, or other legal order, demand (including request pursuant to the Virginia Freedom of Information Act) or request seeking University Data maintained by Contractor, Mason will promptly provide a copy to Contractor. Contractor will promptly supply Mason with copies of data required for Mason to respond, and will cooperate with Mason's reasonable requests in connection with its response.
- MM. SEVERABILITY: Should any portion of this Contract be declared invalid or unenforceable for any reason, such portion is deemed severable from the Contract and the remainder of this Contract shall remain fully valid and enforceable.

- NN. SOVEREIGN IMMUNITY: Nothing in this Contract shall be deemed a waiver of the sovereign immunity of the Commonwealth of Virginia and of Mason.
- OO. SUBCONTRACTS: No portion of the work shall be subcontracted without prior written consent from Mason. In the event that the Contractor desires to subcontract some part of the work specified herein, the Contractor shall furnish Mason the names, qualifications and experience of their proposed subcontractors. The Contractor shall, however, remain fully liable and responsible for the work to be done by its subcontractor(s) and shall assure compliance with all requirements of this Contract. This paragraph applies to, but is not limited to, subcontractor(s) who process University Data.
- PP. SWaM CERTIFICATION: Contractor agrees to fully support the Commonwealth of Virginia and Mason's efforts related to SWaM goals. Upon contract execution, Contractor, if eligible, shall submit all required documents necessary to achieve SWaM certification to the Department of Small Business and Supplier Diversity within 90 days. If Contractor is currently SWaM certified, Contractor agrees to maintain their certification for the duration of this Contract and shall submit all required renewal documentation at least 30 days prior to existing SWaM expiration at <https://www.sbsd.virginia.gov/>.
- QQ. UNIVERSITY DATA: University Data includes all Mason owned, controlled, or collected PII and any other information that is not intentionally made available by Mason on public websites, including but not limited to business, administrative and financial data, intellectual property, and patient, student and personnel data. Contractor agrees to the following regarding University Data it may collect or process as part of this contract:
1. Contractor will use University Data only for the purpose of fulfilling its duties under the Contract and will not share such data with or disclose it to any third party without the prior written consent of Mason, except as required by the Contract or as otherwise required by law. University Data will only be processed by Contractor to the extent necessary to fulfill its responsibilities under the Contract or as otherwise directed by Mason.
 2. University Data, including any back-ups, will not be accessed, stored, or transferred outside the United States without prior written consent from Mason. Contractor will provide access to University Data only to its employees and subcontractors who need to access the data to fulfill Contractor's obligations under the Contract. Contractor will ensure that employees who perform work under the Contract have read, understood, and received appropriate instruction as to how to comply with the data protection provisions of the Contract and to maintain the confidentiality of the University Data.
 3. The parties agree that as between them, all rights including all intellectual property rights in and to University Data shall remain the exclusive property of Mason, and Contractor has a limited, nonexclusive license to use the University Data as provided in the Contract solely for the purpose of performing its obligations under the Contract. The Contract does not give a party any rights, implied or otherwise, to the other party's data, content, or intellectual property, except as expressly stated in the Contract.
 4. Contractor will take reasonable measures, including audit trails, to protect University Data against deterioration or degradation of data quality and authenticity. Contractor shall be responsible for ensuring that University Data, per the Virginia Public Records Act, is preserved, maintained, and accessible throughout their lifecycle, including converting and migrating electronic data as often as necessary so that information is not lost due to hardware, software, or media obsolescence or deterioration.
 5. Contractor shall notify Mason within three business days if it receives a request from an individual under any applicable law regarding PII about the individual, including but not limited to a request to view, access, delete, correct, or amend the information. Contractor shall not take any action regarding such a request except as directed by Mason.
 6. If Contractor will have access to University Data that includes "education records" as defined under the Family Educational Rights and Privacy Act (FERPA), the Contractor acknowledges that for the purposes of the Contract it will be designated as a "school official" with "legitimate educational interests" in the University education records, as those terms have been defined under FERPA and its implementing regulations, and the Contractor agrees to abide by the limitations and requirements imposed on school officials. Contractor will use the education records only for the purpose of fulfilling its duties under the Contract for Mason's and its end user's benefit, and will not share such data with or disclose it to any third party except as provided for in the Contract, required by law, or authorized in writing by the University.
 7. Mason may require that Mason and Contractor complete a Data Processing Addendum ("DPA"). If a DPA is completed, Contractor agrees that the information in the DPA is accurate. Contractor will only collect or process University Data that is identified in the DPA and will only handle that data (e.g., type of processing

sure) as described in the DPA. If Contractor intends to do anything regarding University Data that is not reflected in the DPA, Contractor must request an amendment to the DPA and may not take the intended action until the amendment is approved and documented by Mason.

RR. UNIVERSITY DATA SECURITY: Data security is of paramount concern to Mason. Contractor will utilize, store and process University Data in a secure environment in accordance with commercial best practices, including appropriate administrative, physical, and technical safeguards, to secure such data from unauthorized access, disclosure, alteration, and use. Such measures will be no less protective than those used to secure Contractor's own data of a similar type, and in no event less than reasonable in view of the type and nature of the data involved. At a minimum, Contractor shall use industry-standard and up-to-date security tools and technologies such as anti-virus protections and intrusion detection methods to protect University Data.

1. Immediately upon becoming aware of circumstances that could have resulted in unauthorized access to or disclosure or use of University Data, Contractor will notify Mason, fully investigate the incident, and cooperate fully with Mason's investigation of and response to and remediation of the incident. Except as otherwise required by law, Contractor will not provide notice of the incident directly to individuals who's PII was involved, regulatory agencies, or other entities, without prior written permission from Mason.
2. If Contractor provides goods and services that require the exchange of sensitive University Data, the Data Security Addendum attached to this Contract provides additional requirements Contractor must take to protect the University Data. Mason reserves the right to determine whether the University Data involved in this contract is sensitive, and if it so determines it will provide the Data Security Addendum to Contractor and it will be attached to and incorporated into this contract. Types of University Data that may be considered sensitive include, but is not limited to, (1) PII; (2) credit card data; (3) financial or business data which has the potential to affect the accuracy of the University's financial statements; (4) medical or health data; (5) sensitive or confidential business information; (6) trade secrets; (7) data which could create a security (including IT security) risk to Mason; and (8) confidential student or employee information.
3. Mason reserves the right in its sole discretion to perform audits of Contractor, at Mason's expense, to ensure compliance with all obligations regarding University Data. Contractor shall reasonably cooperate in the performance of such audits. Contractor will make available to Mason all information necessary to demonstrate compliance with its data processing obligations. Failure to adequately protect University Data or comply with the terms of this Contract with regard to University Data may be grounds to terminate this Contract.

SS. UNIVERSITY DATA UPON TERMINATION OR EXPIRATION: Upon termination or expiration of the Contract, Contractor will ensure that all University Data are securely returned or destroyed as directed by Mason in its sole discretion within 180 days of the request being made. Transfer to Mason or a third party designated by Mason shall occur within a reasonable period of time, and without significant interruption in service. Contractor shall ensure that such transfer/migration uses facilities and methods that are compatible with the relevant systems of Mason or its transferee, and to the extent technologically feasible, that Mason will have reasonable access to University Data during the transition. In the event that Mason requests destruction of its data, Contractor agrees to destroy all data in its possession and in the possession of any subcontractors or agents to which the Contractor might have transferred University Data. Contractor agrees to provide documentation of data destruction to the University.

Contractor will notify the University of any impending cessation of its business and any contingency plans. This includes immediate transfer of any previously escrowed assets and University Data and providing Mason access to Contractor's facilities to remove and destroy Mason-owned assets and University Data. Contractor shall implement its exit plan and take all necessary actions to ensure a smooth transition of service with minimal disruption to Mason. Contractor will also provide a full inventory and configuration of servers, routers, other hardware, and software involved in service delivery along with supporting documentation, indicating which if any of these are owned by or dedicated to Mason. Contractor will work closely with its successor to ensure a successful transition to the new equipment, with minimal downtime and effect on Mason, all such work to be coordinated and performed in advance of the formal, final transition date.

TT. UNIVERSITY REVIEW/APPROVAL: All goods, services, products, design, etc. ("Deliverables") produced by the Contractor for or on behalf of Mason are subject to Mason's review and approval. Mason shall have the right to reject Deliverables in accordance with VII DELIVERABLE ACCEPTANCE. If no such written rejection has been given, the Deliverables will be considered accepted. Contractor will re-perform any work not in compliance with this warranty brought to its attention greater than 90 days after that work has been performed. All other warranties, terms, conditions and representations, express or implied, are excluded.

UU. LIABILITY: Except for each Party's obligation of IP indemnification set out in this Contract, for breach of the obligations relating to Confidential Information (other than a breach in respect of Personal Data), and acts of fraud

ther Party to the other in relation to any and all claims in any manner related to the Contract (whether in contract, tort, negligence, strict liability in tort, by statute or otherwise) will be for direct damages, not to exceed in the aggregate an amount equal to the total fees paid or payable to Contractor during the preceding 12 months under this Contract (the "Cap"). For any liability related to breach of Personal Data obligations, such liability will be capped at two times the Cap. In no event will either Party be liable (whether in contract, tort, negligence, strict liability in tort, by statute or otherwise) for any: (i) consequential, indirect, incidental, special or punitive damages, or (ii) loss of profits, revenue, business, opportunity or anticipated savings. Nothing in the Contract excludes or limits either Party's liability to the other for: (i) fraud or willful misconduct, (ii) death or bodily injury, and (iii) any other liability which cannot lawfully be excluded or limited.

VV. WAIVER: The failure of a party to enforce any provision in this Contract shall not be deemed to be a waiver of such right.

Accenture, LLP

DocuSigned by:



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Signature

Name: Damian KellyTitle: Managing DirectorDate: 12/15/2023**George Mason University**

DocuSigned by:



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Signature

Name: Deb DickensonTitle: EVP for Finance & AdminDate: 12/15/2023

This Addendum supplements the above-referenced Contract between the University and Accenture LLP ("Selected Firm/Vendor") dated 2nd Day of January, 2024 (the "Contract"). It is applicable only in those situations where the Selected Firm/Vendor provides goods or services under the Contract or a Purchase Order which necessitate that the Selected Firm/Vendor create, obtain, transmit, use, maintain, process, store, or dispose of University's Protected Data (as defined in the Definitions Section of this Addendum) as part of its work under the Contract.

This Addendum sets forth the terms and conditions pursuant to which Protected Data will be safeguarded by the Selected Firm/Vendor during the term of the Parties' Contract and after its termination.

1. Definitions

Terms used herein shall have the same definition as stated in the Contract. Additionally, the following definitions shall apply to this Addendum.

- a. **"Personally Identifiable Information ("PII")** means any information that can be connected to a specific person and may include but is not limited to personal identifiers such as name, address, phone, date of birth, Social Security number, student or personal identification numbers, driver's license numbers, state or federal identification numbers, non-directory information and any other information protected by state or federal privacy laws.
- b. **"University Data"** includes all University owned Personally Identifiable Information and other information that is not intentionally made generally available by the University on public websites, including but not limited to business, administrative and financial data, intellectual property, and patient, student and personnel data.
- c. **"Protected Data"** means data identified by University to Selected Firm/Vendor as Protected Data and may include, but is not limited to: (1) PII; (2) credit card data; (3) financial or business data which has the potential to affect the accuracy of the University's financial statements; (4) medical or health data; (5) sensitive or confidential business information; (6) trade secrets; (7) data which could create a security (including IT security) risk to the University; and (8) confidential student or employee information. 'Protected Data' includes both Highly Sensitive and Restricted categories of data as defined in the [University Policy 1114 Data Stewardship](#).
- d. **"Securely Destroy"** means taking actions that render data written on media unrecoverable by both ordinary and extraordinary means. These actions must meet or exceed those sections of the National Institute of Standards and Technology (NIST) SP 800-88 guidelines relevant to data categorized as high security.
- e. **"Security Breach"** means a security-relevant event in which the security of a system or procedure used to create, obtain, transmit, maintain, use, process, store or dispose of data is breached, and in which University Data is exposed to unauthorized disclosure, access, alteration, or use, provided that this data is in Accenture's possession and control.
- f. **"Services"** means any goods or services acquired by the University from the Selected Firm/Vendor.

2. Data Security

- a. In addition to the security requirements stated in the Contract, Selected Firm/Vendor warrants that all electronic Protected Data will be encrypted in transmission (including via web interface) and stored at AES-128 encryption or greater. Additionally, Selected Firm/Vendor warrants that all Protected Data shall be Securely Destroyed, when destruction is requested by the University.
- b. If Selected Firm/Vendor's use of Protected Data include the storing, processing or transmitting of credit card data for the University, Selected Firm/Vendor represents and warrants that for the life of the Contract and while Selected Firm/Vendor has possession and control of University customer cardholder data, the software and services used for processing transactions shall be compliant with standards established by the Payment Card Industry (PCI) Security Standards Council (www.pcisecuritystandards.org). In the case of a third-party application, the application will be listed as PA-DSS compliant at the time of implementation by the University. Selected Firm/Vendor will design service delivery processes and procedures that will be submitted to University for review and approval. Selected Firm/Vendor will comply with audit requirements for service providers that are required of University under PCI. Selected Firm/Vendor acknowledges and agrees that it is responsible for the security of all University customer cardholder data or identity information managed, retained, or maintained by Selected Firm/Vendor, including but not limited to protecting against fraudulent or unapproved use of such credit card or identity information in Accenture's possession, control and managed in Accenture systems... Selected Firm/Vendor agrees to indemnify and hold University, its officers, employees, and agents, harmless for, from, and against any and all claims, causes of action, suits, judgments, assessments, costs (including reasonable attorneys' fees), and expenses arising out of or relating to any loss of University customer credit card or identity information managed, retained, or maintained by Selected Firm/Vendor, including but not limited to fraudulent or unapproved use of such credit card or identity information not to exceed the "Cap" set forth in section "SS" to the Contract. Selected Firm/Vendor shall, upon written request, submit to University, the service delivery processes and procedures similar to the Payment Card Industry Data Security Standard (PCI DSS) within 10 business days of the request. Selected Firm/Vendor agrees that, notwithstanding anything to the contrary in the Contract or the Addendum, the University may terminate the Contract immediately without penalty upon notice to the Selected Firm/Vendor in the event Selected Firm/Vendor fails to maintain compliance with the PCI DSS or fails to maintain the confidentiality or integrity of any cardholder data.

3. Employee Background Checks and Qualifications

- a. In addition to the employee background checks provided for in the Contract, Selected Firm/Vendor shall perform to the extent permissible by applicable law the following background checks on all employees who have potential to access Protected Data: Social Security Number trace; seven (7) year felony and misdemeanor criminal records check of federal, state, or local records (as applicable) for job related crimes; Office of Foreign Assets Control List (OFAC) check; Bureau of Industry and Security List (BIS) check; and Office of Defense Trade Controls Debarred Persons List (DDTC).

4. Insurance

- a. In addition to the insurance requirements outlined in the Contract, Selected Firm/Vendor agrees to maintain Cyber Liability Insurance in an amount not less than \$2,000,000 per incident, for the entire term of the Contract. The Commonwealth of Virginia and the University shall be named as an additional insured.

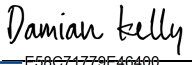
5. Security Breach

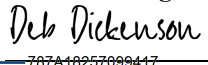
- a. Liability. In addition to any other remedies available to the University under law or equity, Selected Firm/Vendor will, not to exceed the "Cap" set forth in clause "SS" to the Contract reimburse the University in full for all costs incurred by the University in investigation and remediation of any Security Breach of Protected Data, including but not limited to providing notification to individuals whose Personally Identifiable Information was compromised and to regulatory agencies or other entities as required by law or contract; providing one year's credit monitoring to the affected individuals if the Personally Identifiable Information exposed during the breach could be used to commit financial identity theft; and the payment of legal fees, audit costs, fines, and other fees imposed by regulatory agencies or contracting partners as a result of the Security Breach.

6. Audits

- a. Selected Firm/Vendor will at its expense conduct or have conducted at least annually a: i) security audit with audit objectives deemed sufficient by the University, which attests the Selected Firm/Vendor's security policies, procedures and controls; ii) vulnerability scan, performed by industry-standard and up-to-date scanning technology, of Selected Firm/Vendor's electronic systems and facilities that are used in any way to deliver electronic services under the Contract; and iii) formal penetration test, performed by a process and qualified personnel approved by the University, of Selected Firm/Vendor's electronic systems and facilities that are used in any way to deliver electronic services under the Contract.
- b. Selected Firm/Vendor will perform annual penetration tests on Selected Firm/Vendor's IT environments in accordance with Selected Firm/Vendor's internal security policies and standard practices. Selected Firm/Vendor agrees to share with University summary level information related to such tests as conducted by Selected Firm/Vendor to the extent applicable to the Services. For clarity, as it relates to such penetration testing, University will not be entitled to (i) data or information of other customers or clients of Selected Firm/Vendor ; (ii) test third party IT environments except to the extent Selected Firm/Vendor has the right to allow such testing; (iii) any access to or testing of shared service infrastructure or environments, or (iv) any other Confidential Information of Selected Firm/Vendor that is not directly relevant to such tests and the Services. Additionally, the Selected Firm/Vendor will provide the University upon request the results of the above audits, scans and tests, and will promptly modify its security measures as needed based on those results in order to meet its obligations under the Contract.
- c. Selected Firm/Vendor must provide the University with its current industry standard independent third-party certification/attestation such as Service Organization Control (SOC) 2 Type II audit report, ISO27001/2 or equivalent, and provide a list of all subservice provider(s) relevant to the contract. The University shall have sole discretion to determine whether the audit report/certification/attestation provided is sufficient to satisfy the requirements of this paragraph. It is further agreed that such industry standard audit report/certificate/attestation, will be made available free of cost to the University, will be provided upon issuance by the auditor on an annual-basis. The report should be directed to the appropriate representative identified by the University. Selected Firm/Vendor also commits to providing the University with a designated point of contact for these reports, addressing issues raised in the report including if issues have been cited with the subservice provider(s), and responding to any follow up questions posed by the University in relation to the SOC report. Selected Firm/Vendor agrees to be held legally accountable for the accuracy of any self-attestations provided by the Selected Firm/Vendor towards fulfilling the requirements within this addendum.

IN WITNESS WHEREOF, this Addendum has been executed by an authorized representative of each party as of the date set forth beneath such party's designated representative's signature.

DocuSigned by
Accenture, LLP

 E58C71779E46406...
 Signature
 Name: Damian Kelly
 Title: Managing Director
 Date: 12/15/2023

DocuSigned by
George Mason University

 767A18257089417...
 Signature
 Name: Deb Dickenson
 Title: EVP for Finance & Admin
 Date: 12/15/2023

Accenture LLP
800 North Glebe Road
Suite 700
Arlington, VA 22203
www.accenture.com



July 27th, 2023

Grace Lymas, Assistant Director
Purchasing
George Mason University

RE: RFP GMU-1859-23 - Negotiation Memorandum: Accenture Response

Dear Ms. Lymas,

On behalf of Accenture, I am pleased to submit our response to your Negotiation Memorandum.

As we discussed in our RFP response and in the presentations we gave to you on June 5th, 2023, we would be thrilled to work with Mason in Transforming your Student Experience using the Salesforce suite. Accenture brings you a committed team drawn from the Nation's top Salesforce practice and our leading Education specialists. We are ranked #1 by various analysts for our deep and impactful Salesforce deployments across all industries. This is important because it means we have the delivery experiences and lessons learned that apply to the most impactful Salesforce projects. Our Salesforce capability is augmented by our deep Higher Education experience, which you have seen in the engagements we have performed with you and is exemplified by the team we bring. We understand where you have come from and where you want to go. We know you and we know how you like to work. We share your values, and we hope you saw that throughout our interactions with you.



The detailed responses to your questions are below – your questions in bold type, our responses follow each of your questions.

Please provide detailed answers and additional documentation if necessary, in order to thoroughly evaluate your response:

i. Mason will require custom software development to be determined through project requirement development phase. Implementation partner resources will conduct all development and these activities must be included in the fixed price.

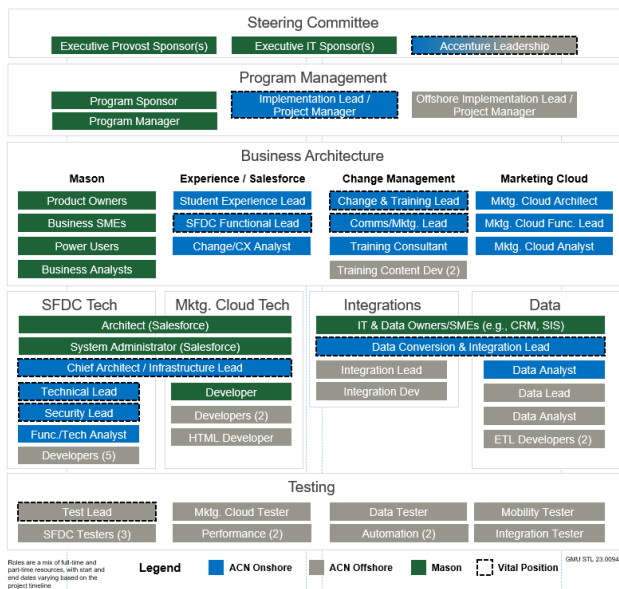
This is included as part of our solution. Our proposal includes a recommended solution and related components that meet Mason's requirements and use cases specified in Appendix 11.0 starting on page 67 of the RFP. We recognize the solution may require configurations, custom development or 3rd party apps to implement certain features or functions of the product given the software's current limitations or Salesforce's planned longer-term roadmap as it pertains to Salesforce Education Cloud. Additionally, we identified certain integrations which may require custom development. Throughout the entire delivery process, we will work with Salesforce to ensure we are moving forward with appropriate customizations or 3rd party apps in a smart way as we consider their longer-term roadmap. We have been working side-by-side with Salesforce and have extensive experience navigating Salesforce's roadmap alongside them. Throughout the program we will continuously leverage our governance processes to ensure we are making smart decisions on where to customize versus leverage "out-of-the-box" capabilities.

ii. Mason will provide the following full-time resources: 1 PM, 1 BA, 1 Developer, 1 Architect, 1 System Administrator. All other mason resources may only be available in limited capacities. Please provide additional information indicating your staffing plan that reflects this structure of allocated resources.

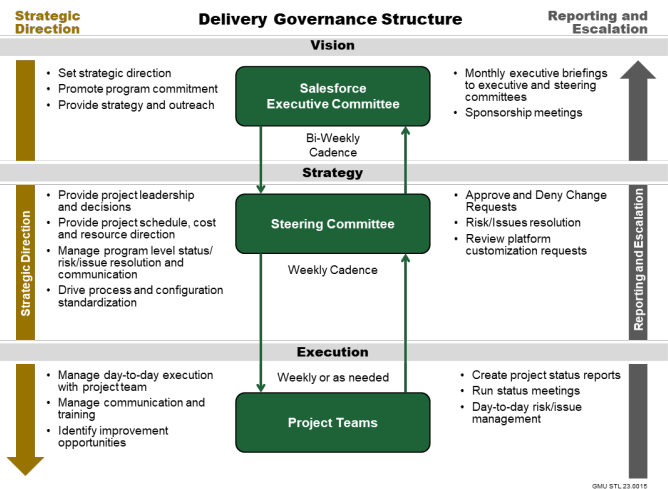
We will form an integrated team across Mason and Accenture that can work closely together during delivery – to do this project with you, not to you, illustrated in our proposal in Figure 18 of our proposal.

Our proposed plan includes the following full-time Mason resources, which can be seen in the diagram on the right.

- 1 PM (Project Manager)
- 1 BA (Business Analyst)
- 1 Developer
- 1 Architect
- 1 System Administrator



iii. Decision making for this project must go through the established governance process at the university (Salesforce Executive Committee).



Our delivery governance will be tightly coupled with Mason’s Salesforce Executive Committee.

We will work with Mason to mobilize and operationalize this structure, making changes to this structure should you need it to fit into your existing governance protocols.

iv. Vendor is required to develop and provide all necessary training as part of this implementation which are included in the firm-fixed price.

We will provide all the necessary elements to enable successful training for Mason. Our recommendation is to leverage a change network and train-the-trainer model. Our training approach is summarized in the diagram below and additional details can be found in our proposal in section 7.7 starting on page 147.



v. Third party app integration is a requirement of the vendor and must be included in firm-fixed price.

Third party integrations are included in our fixed price. For clarity, the integrations we have included in our proposal are:

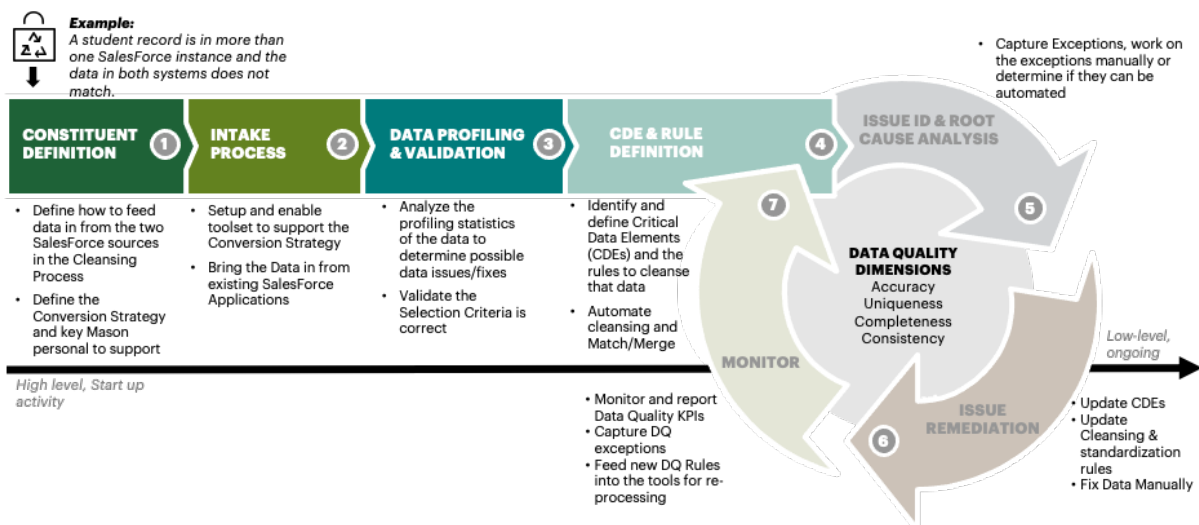
1. Common App
2. Nova Student System
3. Ellucian Banner
4. Salesforce to Data Mart
5. Mason 360
6. Tableau
7. Marketing Cloud
8. Microsoft Outlook
9. CTI

Any additional integrations required will be evaluated during our discovery phases.

vi. Please provide your firms' MDM (master Data Management) strategy to include data cleansing, de-duplication and validation.

We introduce our MDM approach on page 75 of our proposal and go into more detail within our Data Conversion and Migration Plan section on pages 112 through 114. Our high-level approach below will enable us to help you clean, de-duplicate, and validate data to support your Master Data Management objectives.

A Data Conversion Data Quality (DQ) Assurance process enables continuous enhancements to data based on a set of structured, repeatable steps.



2. Pricing:

At this time, we request that you re-visit your pricing and apply any available discounts or pricing breaks. Please address specific pricing requests below:

a. Mason is requesting a firm-fixed pricing for the duration of the contract. if Mason opts to renew, pricing increases shall not exceed 2% per annum and must be approved by the Buyer with feedback from Contractor Administrator (CA) prior to renewal.

We can confirm that the pricing provided is a firm-fixed price for the project we proposed, which is a 25 month delivery. The hourly rates we provided in the Vendor Staffing model are valid for the 25 months of the proposed delivery.

b. Mason is willing to enter into a two(2) year base contract with eight (8) optional, one (1) year renewal options. This could result in a ten (10) year contract arrangement with your firm if all renewals are executed. We would appreciate it if you could take that into consideration, as well as the likely opportunity for scope growth in the future, when considering your discounts and increase those discounts accordingly.

We thank Mason for this. Should addition extensions be requested, we would, with you, look to agree on mutually satisfactory scope, rates and discounts. As the scope of the future work is not yet clear, we think it better to discuss the future contracts after delivery commences.

c. An incentive to being awarded a contract with George Mason University is that it will be a cooperative contract vehicle through VASCUPP, Virginia Association of State College & University Purchasing Professionals, which can and likely will be used by other Commonwealth of Virginia Universities and state agencies. It will also be open and available to agencies outside of the Commonwealth of Virginia as this RFP will result in a cooperative, competitively solicited contract.

We thank Mason for this, and would be willing to discuss Service Credits with Mason should other organizations wish to use this cooperative contract vehicle.

Please note that you do not have to resubmit your entire proposal if you are only adjusting your pricing. We only need to see the pricing adjusted unless other aspects of your offer are impacted.

As mentioned above, we would be happy to discuss Service Credits with Mason should other organizations wish to use this cooperative contract vehicle. Additionally, should the contract with Mason be extended after the first 25 month delivery, we would be happy to offer discounts to Mason against that future work. As the scope of the future work is not yet clear, we think it better to discuss the future contracts after delivery commences.

We would also like to draw your attention to the scale of the discount we have already provided Mason. Our pricing currently includes a one-time strategic investment of \$1.8m (a 12% discount),

against our proposed role-based price, which reflects the strategic nature of our work with Mason and our desire to team with you.

At this point our pricing response remains unchanged, however we remain committed to working collaboratively with Mason through the negotiation and BAFO stage of this solicitation.

3. GMU Standard Contract GMU-1859-23 Terms and Conditions:

As part of Request for Proposal RFP GMU-1859-23 Mason provided a Sample Contract (Attachment B) and a Data Security Addendum (Attachment C). It is the intent of this solicitation to base the final contractual documents off of Mason's standard two-party contract, Mason's General Terms and Conditions, and Mason's Data Security Addendum (DSA). Will your firm require Mason to incorporate any of your firm's documents or terms and conditions into the final contract if award is made to your firm?

We have provided, as attachments to this letter, 'redlined' versions of Attachment B and Attachment C which contain the minor adjustments to your standard documents that we wish to be accepted by Mason.

As I have previously mentioned, supporting this important work is personal to me. Many of my family members attended Mason including my wife and brother-in-law and for the past 6+ years I have served on the Mason Entrepreneurship Advisory Council. As Accenture's lead for our higher education and public sector clients in Virginia and across this region, you have my commitment that our project team will help Mason deliver the outcomes that you need and expect. Should you have any questions or require additional information, please contact me at david.t.metnick@accenture.com or (703) 947-4072.

Sincerely,



David Metnick
Managing Director
Accenture LLP | Education, Health & Public Service

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www.accenture.com



August 11th, 2023

Grace Lymas, Assistant Director
Purchasing
George Mason University

RE: RFP GMU-1859-23 - Negotiation Round 2 Memorandum: Accenture Response

Dear Ms. Lymas,

On behalf of Accenture, I am pleased to submit our response to your Negotiation Memorandum dated August 7th.

After review of your responses, the committee requests that all finalists review their proposed pricing once more and provide additional price reduction for overall services per the subject request for proposal.

Having considered your request, we are pleased to offer an additional, one-time discount of \$225,000 based on our long-standing commitment to you. We show this in the table below:

Undiscounted Price	\$14,833,875
Initial submission discount	\$(1,833,875)
Initial submission price	\$13,000,000
Further negotiation discount	\$(225,000)
Revised price	\$12,775,000

Following completion of deliverables within the initial 24 months, please confirm that the hourly rates for each labor category will remain the same for possible future projects/services.

We are pleased to be able to hold the rates we provided for an elongated period, as shown in the table below. These rates are valid for extensions related to this project and assume a similar mix of resources as during the initial delivery.

Year 1 & 2, starting at contract award	zero increase to rates
Year 3 to 5	increase rates in line with the suggested 2% per year
Year 6 onwards	increase rates not to exceed the Hewitt Index on an annual basis

We remain committed to working with Mason on this project to help you deliver the outcomes that you need and expect. Should you have any questions or require additional information, please contact me at david.t.metnick@accenture.com or (703) 947-4072.

Sincerely,



David Metnick
Managing Director
Accenture LLP | Education, Health & Public Service

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September 13th, 2023

Grace Lymas, Assistant Director
 Purchasing
 George Mason University

RE: RFP GMU-1859-23 - Negotiation Round 3 Memorandum: Accenture Response

Dear Ms. Lymas,

On behalf of Accenture, I am pleased to submit our response to your Negotiation Memorandum dated September 8th.

With particular attention to Organizational Change Management and Communications and Marketing, please suggest ways to provide identical levels of service but transfer appropriate staff from management/leads to more junior roles to lower the total project cost.

We have carefully considered your request and have reduced the seniority of one of the team members we proposed in the Organizational Change Management area. This change allows us to reduce the effective hourly rate for that role while providing the necessary level of service. We show this in row 7 of the Detailed Resource Model – 91323 tab (in the attached GMU Salesforce Vendor Pricing Model - Accenture – 091323.xls) which would change from:

#	Deliverable /Phase	Role/Position Title (Vital Position Table)	Total month hours	Hourly rate	Total month hours x Hourly rate
7	Phase 1 & Phase 2	Organizational Change Management Lead	10,703	300	3,210,900

To

#	Deliverable /Phase	Role/Position Title (Vital Position Table)	Total month hours	Hourly rate	Total month hours x Hourly rate
7	Phase 1 & Phase 2	Organizational Change Management Lead	10,703	280	2,996,840

For every hourly position rate listed, please adjust your pricing to reflect the most favorable hourly rate you offer to any other government or higher education customer.

In addition to the above change, we are now offering a further one-time discount, reducing our price to \$11,900,000. This is a very significant reduction, and we can confirm that the overall price

we are offering compares very favorably to our recent submissions to higher education institutions requesting Salesforce-based implementation services.

We show the further discount in the table below:

Undiscounted Price	\$14,833,875
Initial submission discount	\$(1,833,875)
Initial submission price	\$13,000,000
Further negotiation discount	\$(225,000)
Revised price at 2 nd negotiation	\$12,775,000
Reduction of OCM Lead seniority	\$(214,000)
Further discount	\$(661,000)
Revised price	\$11,900,000

In respect of your wish to see this discount expressed as rates, we have apportioned the total discounts above into the effective hourly rates in the Detailed Resource Model – 91323 tab (in the attached GMU Salesforce Vendor Pricing Model - Accenture – 091323.xls). Our Vital Position Rates for change requests remain unchanged.

We remain committed to working with Mason on this project to help you deliver the outcomes that you need and expect. Should you have any questions or require additional information, please contact me at david.t.metnick@accenture.com or (703) 947-4072.

Sincerely,



David Metnick
Managing Director
Accenture LLP | Education, Health & Public Service



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October 11th, 2023

Grace Lymas, Assistant Director
 Purchasing
 George Mason University

RE: RFP GMU-1859-23 - Negotiation Round 4 Memorandum: Accenture Response

Dear Ms. Lymas,

On behalf of Accenture, I am pleased to submit our response to your Negotiation Memorandum dated October 5th.

- **Please further adjust the mix of senior personnel to more junior personnel**
 - o **For all lead roles that contain hours greater than one FTE (with the exception of testing), please recommend a more favorable mix of junior and senior resources to support scope without a decrease in total hours.**
- **Please review the rate for the onshore project manager role and advise if a more competitive rate can be offered.**
- **Without adjusting the total hours or any deliverables, please provide a combination of additional discounts and or hourly rate reductions to bring the total project cost to \$8.75M.**

We are addressing the above questions together. To meet the total project cost requested, we reduced the seniority of some of our team and modified the onshore/offshore mix of our team. As you requested, there are no changes to total hours or deliverables. Our price of \$8.75M represents a significant additional investment in George Mason.

With the additional investment, please note the following updates to our assumptions:

Old Assumption	New Assumption
Accenture's price to Mason is based on Firm Fixed Price basis, as such the hours and roles are our initial estimate of the work required to meet the solutioned requirements.	With the shift in staffing mix, we are providing this work on fixed price for fixed capacity basis. There are no material changes to hours or deliverables, and the checkpoint at the end of the discovery phase will confirm the activities and plans to be performed by that fixed capacity.
Student Communications: We will create a marketing and communications campaign for each audience segment and select a corresponding set of engagement activities that fits	Student Communications: We will create a marketing and communication campaign template for GMU to leverage to create

<p>their needs and preferences, including tailored engagement activities. The campaign will include website development and maintenance, marketing collateral (key narratives, executive talking points, slide decks, infographics), newsletters, and videos.</p> <p>To create the campaign, we will:</p> <ul style="list-style-type: none"> - Review goals of the campaign with Mason - Identify the audience segments and create a vision for each segment for all marketing and communications activities - Develop the marketing and communications materials, which we will review with Mason and request approval - Develop a set of criteria to measure performance, including surveys from focus groups, and clicks on Mason's public-facing and internally facing website (details on the website are provided in the section on 'Website' below) - Launch the marketing campaign. We will monitor incoming results and feedback and adjust the marketing plan, and campaign as needed for improved outcomes 	<p>the customized communication campaign by audience segment.</p> <p>The campaign template components will include non-audience segment specific website development, marketing collateral, newsletters and videos.</p> <p>To create the campaign we will:</p> <ul style="list-style-type: none"> - Review goals of the campaign with Mason - Identify the audience segments - Develop the marketing and communication material templates - Develop a set of criteria to measure performance, including surveys from focus groups, and clicks on Mason's public-facing and internally facing website (details on the website are provided in the section on 'Website' below) - Launch the marketing campaigns generated by GMU. We will monitor incoming results and feedback and adjust the marketing plan, and campaign as needed for improved outcomes
<p>Student communications will be delivered through Marketing Cloud using data extensions to store student data and journeys or drip campaigns to support transactional communications such as reminders to register. Additional support will be provided for bulk applicant communications related to prospect marketing, program interests, and applications.</p> <p>Most requirements for mass communications for Student Success and Recruitment and Admissions are delivered through Marketing Cloud, so we recommend including the initial Marketing Cloud solution with Student Success features in Release 1. We will work with the team to deliver additional Marketing Cloud functionality for more business units, data extensions, and journeys needed for Recruitment and Admissions. Our delivery plan includes a recommendation for the Marketing Cloud team to work closely with Mason's communications and marketing teams focused on Student Success and Recruitment and Admissions during each phase to understand the procedures for developing and creating campaigns related to Mason's marketing strategy.</p>	<p>We will work with Mason's communication and marketing teams to deliver an initial data extension and templates for bulk applicant communications related to prospect marketing, program interests, and applications. Marketing Cloud functionality delivered will be foundational with templates included for GMU to use to personalize across audience segments and GMU departments.</p>

•Mason requests that the hourly rates for all positions, once agreed upon, will remain fixed for all option years.

Please see the table below showing the adjustments to the COLA treatment for our rates including an additional cap on rate increases for onshore based resources. We selected 2% as this rate was stated in GMUs Standard Terms and Conditions, Section FF. The rates remain as submitted in the Vital Positions Rates tab of the vendor pricing model we provided GMU on September 13th, 2023.

Contract Year	COLA Treatment
Year 1 & 2	0%
Years 3 to 5	2% per year
Years 6 to 7	Onshore: 2% per year Offshore: Increase not to exceed the Hewitt Index per year
Years 8 onwards	Increase not to exceed the Hewitt Index per year

We remain committed to working with Mason on this project to help you deliver the outcomes that you need and expect. Should you have any questions or require additional information, please contact me at david.t.metnick@accenture.com or (703) 947-4072.

Sincerely,



David Metnick
Managing Director
Accenture LLP | Education, Health & Public Service

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October 20th, 2023

Grace Lymas, Assistant Director
Purchasing
George Mason University

RE: RFP GMU-1859-23 - Negotiation Round 5 Memorandum: Accenture Response

Dear Ms. Lymas,

On behalf of Accenture, I am pleased to submit our response to your Negotiation Memorandum dated October 18th.

- 1. Please confirm that the resources assigned are equivalent in experience to the team members originally proposed OR that the mix of Sr/Jr resources retains the same Sr personnel (ie Megan Roddy)**

We can confirm that the overall mix of resources is equivalent to the team members originally proposed.

- 2. We noticed a difference in verbiage between the Old and New Assumptions. Please confirm that the proposed deliverables remain the same in content and expected mix of Accenture/Mason resources**

The update in assumptions was to clarify the updates made as part of the solution changes requested. The core content of the deliverables remain the same, as does the expected mix of resources.

- 3. Would you be able to participate in a call with the Salesforce project team to discuss certain proposal details more thoroughly?**

We would be delighted to spend time with Mason. Please provide dates and times that are convenient to you, and we will promptly confirm our availability.

We remain committed to working with Mason on this project to help you deliver the outcomes that you need and expect. Should you have any questions or require additional information, please contact me at david.t.metnick@accenture.com or (703) 947-4072.

Sincerely,

A handwritten signature in black ink, appearing to read "David Metnick".

David Metnick
Managing Director
Accenture LLP | Education, Health & Public Service

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October 30th, 2023

Grace Lymas, Assistant Director
Purchasing
George Mason University

RE: RFP GMU-1859-23 - Negotiation Round 6 Memorandum: Accenture Response

Dear Ms. Lymas,

It was great to meet you and the Mason team on Monday last week. We felt that it was a very productive conversation; we look forward to continuing the discussions and partnership in due course.

Per the Mason's team guidance, we took the following actions:

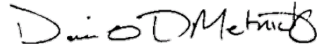
- 1) To provide an addendum to our original proposal, highlighting any significant changes since its original submission. I attach that as Accenture GMU Proposal Addendum.doc, with a companion additional resumes file Accenture GMU Proposal Additional Resumes.doc.
- 2) To offer Mason the opportunity to interview our proposed Organizational Change Management Lead, along with some alternative options if you wish. Our proposed resource is Amanda Tadros, with alternatives of Rachel Moses and Shelagh Diederich. You will find their resumes in the additional resumes file. Should the team wish to meet with Amanda, Rachel, Shelagh, or all three, I am happy to facilitate scheduling.

One of the discussions we had on Monday was related to timescales, with Mason's intent to decommission EAB Navigate system by August 2025. Our plans, as you'll see in the Proposal Addendum, support that decommissioning plan with an assumed project kickoff in January 2024. With that in mind, and should we be so privileged to be awarded, I would like to suggest the following outline timescale for the next two months:

- Statement of work drafting and agreement 1st two weeks of November, 2023
- Contractual discussions (if any are needed) 2nd week of November, 2023
- Contract & Statement of work signature by Thanksgiving
- Mobilization, soft kickoff, pre-work in December, before the Holidays
- Formal kickoff 1st two weeks of January, 2024

We remain committed to working with Mason on this project to help you deliver the outcomes that you need and expect. Should you have any questions or require additional information, please contact me at david.t.metnick@accenture.com or (703) 947-4072.

Sincerely,

A handwritten signature in black ink, appearing to read "David Metnick". The signature is fluid and cursive, with the first name "David" and last name "Metnick" clearly distinguishable.

David Metnick
Managing Director
Accenture LLP | Education, Health & Public Service

Training & Onsite Support / Organizational Change Management Lead Options

We greatly appreciate and understand how important it is for Mason to feel comfortable with the choice of Training and Organizational Change Management Lead. Through our discussions with you throughout this process, we have come to understand those characteristics, skills, and experiences that are important for you to see exemplified in a person in this role, and we have selected a set of candidates with this in mind.

While we are confident in each candidate's ability to deliver this program with Mason, we have provided key considerations on unique experiences and suitability to help as you make your final decision. Should you want to debrief with us – we are available and open. The table below summarizes Amanda, Rachel and Shelagh's experience and suitability for the role.

Candidate	Key Considerations
Amanda Tadros	<ul style="list-style-type: none">• Most senior candidate with deep higher education experience including with student processes and CRM strategy / design• Strong program management and change management executive• Ready, available and eager to work alongside Mason on a full-time basis, however, not a local resource so more limited in-person availability
Shelagh Diederich	<ul style="list-style-type: none">• Entire career spent managing change with higher education clients• Strong in change and training execution• Ready, available and eager to work alongside Mason on a full-time basis• Local, able to be onsite more if needed
Rachel Moses	<ul style="list-style-type: none">• Deep change management experience across industries including higher education• Passionate about change management specifically for technology transformations• Brings understanding of how to tailor private sector leading practices to public sector environments• Ready, available and eager to work alongside Mason on a full-time basis. Based in region, moderate in-person availability.

Amanda Tadros

Organizational Change Mgt Lead /
Training & Onsite Support Lead

Length of Tenure at Accenture:
10+ years



Amanda has 10+ years in Accenture’s Public Service practice, specializing in Higher Education. Her work is focused primarily on complex program delivery, business transformation, project management, change management, training, communications, talent management and organizational transformation. Functionally, she works deeply in the area of digital student and alumni service. Amanda also leads Accenture’s Education Analyst Community, where she informs the community on industry trends, teaches Accenture methodology and best practices, and aligns analysts to higher education opportunities.

Summary of experience

- 10+ years in Accenture’s Public Service practice.
- Leads Accenture’s Education Analyst Community.
- Her work is focused primarily on complex program delivery, business transformation, project management, change management, training, communications, talent management and organizational transformation.

Relevant experience: (Organized by relevance)

**Confidential US-Based
Online Higher
Education Institution**
**Strategic Student
Experience Roadmapping**
Delivery Lead
Aug – Sept 2021

- Working with the institution’s Chief Experience Officer, Amanda led delivery of the planning phase for the university’s student experience strategic plan. She facilitated workshops with key university stakeholders to validate strategic goals and opportunities and led development of the planning and execution plans for these initiatives. She also led a series of prioritization workshops to develop a prioritized near-term and future state roadmap.

Laureate Education
**Global Finance
Transformation**
Global Change
Management Lead
Feb 2016 – Dec 2016

- Amanda delivered the change management effort, which included 21 deployments over 18 months. She partnered with director-level leadership at corporate and regional levels to strategize on how to best deploy change management efforts across regions, which included creating a 100+ hour training curriculum, defining a multi-audience and multi-regional communications plan, and determining the deployment timelines

Laureate Education
**Global Student
Transformation**
Account Manager / Deputy
Project Manager
Jan 2017 – Dec 2019

- Amanda served as Account Manager and Deputy Project Manager to a global Higher Education client. She developed and delivered a strategy that impacted 400k+ students and 500+ administrators, and developed the integrated program plan, managing over 120K effort hours across 15+ workstreams, and managed project staffing model and financials against an ever-changing project timeline and scope.

**Northwestern
University**
**CRM Modernization
Assessment for
Advancement**
Delivery Lead
Aug – Nov 2022

- Amanda led delivery of a CRM modernization assessment for the University’s advancement office. She conducted market research to identify the leading CRMs in the advancement space and provided the University with requirements and potential solutions to best meet their unique needs.

Amanda Tadros

Organizational Change Mgt Lead /
Training & Onsite Support Lead

Length of Tenure at Accenture:
10+ years

University of
Wisconsin

System Modern ERP Pre-
Planning

Program Manager
Aug – Dec 2020

- Supported delivery of program management, governance, and business process design recommendations to shape a modern, cloud-based ERP transformation program. Amanda facilitated workshops and dialogue on the program vision and key decisions. She coordinated with the change management team on development and delivery of program communications across the institution.

Michigan

Unemployment Insurance
Agency Covid-19 Call
Center Stand-Up

Change/Engagement Lead
Mar – Aug 2020

- Amanda was an executive leader on program management team, responsible for development and delivery of all onboarding, training, knowledge management, and engagement of 500+ agents. She was also the direct link between project and Accenture HR for mental health, social justice and rapid response initiatives

Education, Certifications, and Affiliations:

- B.S. in Life Sciences Communications from the University of Wisconsin - Madison

Rachel Moses

Alternative Organizational Change Lead

Length of Tenure at Accenture:
6+ years



Rachel is a Manager within Accenture's Talent & Organization/Human Potential Services Group. Rachel has over six years of experience leading and supporting Change Management activities for technology implementations and transformations, and over ten years of experience with corporate communication activities for high-profile organizations.

She has deep experience applying organizational change management to various business and technology transformations. Rachel puts a priority on relationship building for both her clients and her client organizations, as understanding people and creating compelling messaging is at the heart of a good change management experience.

Summary of experience

- Rachel has worked across various industries including higher education, financial services, life sciences & health care, energy and retail.
- Rachel has expertise in change management strategy, change management execution, corporate communications, and global deployments.
- Rachel has over six years of experience leading and supporting Change Management activities for technology implementations and transformations

Relevant experience:

Regional High Education System (South)

ERP Implementation

- Led the 10-person Change Management team to design, develop and implement transformational change in an ERP system implementation.
- Advised directly with the CHRO and his leadership team to lead activities and deliverables such as the project vision and alignment, leadership engagement approach, enterprise communications planning and execution, readiness-report creation, and org-wide training.
- Set the standard for communicating and engaging employees in a remote setting, including tactics and solutions to reaching end users in a newly virtual working environment.

Global Retailer
Workday and Salesforce
Change Management
Strategy +
Implementation

- Led a Change Management team to support the implementation of Workday HCM, Workday Financial Management, and Salesforce CPQ for a global retail client impacting all business areas and functions.
- Delivered full scope of change management activities including stakeholder analysis, change impact assessment, comms strategy and execution, readiness planning, and training plan and execution.
- Engagement and training topics covered Workday applications such as Core HCM, Recruiting, Onboarding, Compensation, and Talent & Performance; and Salesforce CPQ.

Insurance Broker
Change Management
Strategy

- Led a Change Management team to lead Workday HCM and Workday Finance change management strategy, including stakeholder, change impact, communication, change champion and training strategies.

Rachel Moses

Alternative Organizational Change Lead

Length of Tenure at Accenture:
6+ years

Global Digital
Financial Institution
Change Management
Strategy and Training
Implementation

- Program aims to implement a consistent, standardized and organization transformation.
- The program impacts 10,000 employees.
- Led a Change Management team to lead Workday HCM change management strategy and support HR Transformation work (incl ServiceNow implementation).
- Program aims to implement a modern HCM technology and to enhance the HR and employee experience with the introduction of ESS / MSS and through automated processes which support scalability and enterprise growth. The program impacts 11,000 employees.
- Delivered strategic activities including a stakeholder analysis, change impact assessment, baseline communications plan, baseline training plan and initial Walking Deck.
- Lead in training program impacting 11,000 employees, including a blended approach of instructor led trainings, e-learning, job aids, videos and more.

Shelagh Diederich

Alternative Organizational Change Lead

Length of Tenure at Accenture:
9+ years



Shelagh serves in Accenture's Health and Public Service practice and has 9 years of change management experience. Her work focuses on technology implementation, process re-engineering/development, project management, training and learning strategy, communications, and readiness programming. She has consulted for 20 higher education institutions within their HR, Finance, Operations, and Academic divisions and 4 state governments on software implementation, assessment, and innovation. Her focus is on helping organizations transform how they use technology to improve outcomes for internal and external stakeholders.

Summary of experience

- Expertise in change management, communication strategy, technology implementation, and training and knowledge transfer.
- Experienced in higher education, state government, and non-profit industries.
- Serves in Accenture's Health and Public Service practice and has 9 years of change management experience.

Relevant experience:

UMGC Project Lead	Created approach, workplan, deliverables and currently leading delivery of a current-state assessment of HR processes, evaluating requirements against Workday HCM capabilities to build a roadmap for process, policy, and related changes, updates, integrations and/or extensions required to address HR business needs.
The Ohio State University Workday Change Consultant	Managed Compensation, Benefits, and Absence change efforts, including communication plans and materials, training object development (e.g., live training presentations, job aids, videos) and identified Payroll and FIN crossover change needs. Collaborated with client to build synchronous and asynchronous training material for HR units, administrative personnel, and senior leaders. Created and delivered three specialized synchronous Administrative Assistant Onboarding sessions to over 400 individuals.
Public Regional Colleges and Universities Change Strategy Consultant	Partnered with client to define 2-year strategy roadmaps for rollout of student success management system by analyzing existing strategic plans, policy, governance, and IT infrastructure. Coached 12 public university leaders in creating and managing knowledge-base content, marketing and communications, and overall readiness plans related to implementing Navigate 360. Mentored 4 consultants on managing student mobile app and staff CRM launch and managing long-term value stages.
State of Missouri Oracle Training Lead	Led all aspects of designing, developing, and implementing a training and performance support solution. Partnered with functional and technical teams across government agencies and software vendors to coordinate a 5-phase rollout of Oracle to replace state legacy systems. Established, outlined, and refined strategy on the execution of key deliverables (\$9.5M) required for successful knowledge transfer for project team and end-users through plan and design and

Shelagh Diederich

Alternative Organizational Change Lead

Length of Tenure at Accenture:
9+ years

State of North
Carolina
Project Kitty Hawk
Communications Lead

final deployment. Built and executed the train-the-trainer and end-user learning program, managing 37 trainers and 387 specialized end-users. Created and coordinated development of 50 training artifacts including 8 hours of instructor-led training content.

State of Iowa
Workday
Training Development Lead

Delivered the first communications framework for a newly created online platform management organization. Established organizational structures and task descriptions for key communications roles, including area-specific RACIs, to build a streamlined communications division. Created communications workplan and tracker to identify required messaging and vehicle(s) needed for launch.

Managed the development of all (135) training items via 8 training resources for 19,000 state employees, including the creation of SOPs, accessibility validation, and liaising with readiness and communication teams to ensure message alignment. Led all functional meetings with client HR and FIN teams to create and prioritize training expectations, offerings, process, delivery content, and methods. Created and facilitated first-of-its-kind client reflections workshop to solicit feedback and improve processes.

Education, Certifications, and Affiliations:

- M.P.A., The University of North Carolina at Chapel Hill
- B.A., Political Science, Boston University
- B.A., Spanish, Boston University

Many of our resources remain unchanged; please see our initial response for those resumes. The ones below detail the experience of resources that were not in our initial response or who are now being proposed for alternative roles.

8 years



Zehra prides herself to build strong partnerships with clients, market unit leadership, and junior team resources. She effectively provides support for leadership, ensures business model innovation, people engagement, stakeholder management and successful project scaling. She is an expert in organizational change strategy, including talent, training, program design, and communications.

- Proven Salesforce Delivery Lead, managing stakeholders, functional and technical resources to deliver to project aims.
- Adept communicator, with experience across multiple industries.

- Responsible for the overall delivery success of the project. Additionally acted as Scrum master and functional lead.
- Successfully managed extensive work and client relationship across 3+ separate divisions.
- Quickly built credibility with the Senior Deputy Director and the Chief Information Technology Officer.
- Led a team of 6 USA, 12 India, and 5 IT resources from the client, while coordinating with 18 client operational people.

- Partner with the client counterparts to understand requirements for Salesforce system that comprises of 3 Community Portals to be used across the State.
- Document all User Stories to ensure complete functional details are met in the technical build. Provide periodic demo of the functionality back to the client and facilitate enhancements and bug fixes.
- Additionally responsible as the UAT Support lead, ensuring day to day management of defects/questions are aligned between client and 3rd part.
- Acted as the primary point of contact for the Director of Communications to ensure professional and clear email template design.

Zehra Azam**Project Manager / Implementation Lead***Length of Tenure at Accenture:*
8 years**Accenture****Accenture Cloud Journey
in Corporate Functions**Change and
Communication Lead

Sep 2017 – Dec 2020

- Developed and executed change initiatives to enable successful transition to the target state (95% in the Cloud) of the global Cloud Migration journey.
- Fostered innovation across 30+ workstreams enabling quick and agile change ideas to be implemented seamlessly into daily functions. Managed communications and change request process for over 800+ applications migrated successfully and securely to the top three Cloud providers.
- Led all adoption and people engagement efforts for 500+ resources via multiple channels, including recognition approach, stakeholder engagement surveys, and training strategy.

**Archer Danials
Midland**Change Training and
Adoption Lead

Nov 2015 – Sep 2017

- Define and implement the change journey related to multiple releases of Salesforce functionality across 15+ stakeholder groups from different Business Units and Geographies.
- Designed and deployed completely new functionality virtual Training for 95% remote end users. Increased adoption by constructing Top-Down communications sent on behalf of high-level company leadership.

3MTraining and Deployment
Lead

Jun 2015 – Nov 2015

- Designed and delivered the global Training plan for over 2K end users via a Train-the-Trainer global deployment.
- Travelled in partnership with client counterpart to 5 countries to facilitate training.
- Led onboarding, continuing education, and change journey tracking for teams in 20+ locations; led small- and large-group meetings (in person and virtual) for executive client team.

Education, Certifications, and Affiliations:

- University of Maryland, Bachelor of Arts in Communication

Kara McIntyre

Functional Lead

Length of Tenure at Accenture:
8 years



Kara has been operating on, implementing, and customizing the Salesforce platform in higher education since 2009. She served for five years as a Salesforce business analyst then system administrator at a higher education institution developing custom applications as well as supporting and implementing Salesforce within the areas of student recruitment and admissions for undergraduate, graduate, and adult education; student services; program management; and advancement.

She has 8 Salesforce certifications and has worked as a higher education consultant in the system admin, project lead, and solution architect roles since 2014 gathering requirements, designing, and implementing Salesforce in the areas of recruiting and admissions, student success, corporate relations, professional development, and marketing.

Summary of experience

- 13 years of experience using and implementing Salesforce CRM in higher education, with 8 years of technical architecture experience in Salesforce Education Cloud functionality.
- 8 years of experience managing functional teams in higher education for Salesforce assessment, implementation, and support projects.

Relevant experience:

Georgia Institute of Technology

Professional Development, Enterprise, Student Success

Project Lead

Solution Architect

Jul 2022 – Present

- Lead requirements gathering, strategy, design, configuration, and training for a Salesforce implementation focused on data and communications in Marketing Cloud, web form submissions, practicum management, a custom subscription center, and student success hub for the enterprise and professional development teams.
- Support future roadmap project planning for professional development Salesforce initiatives as part of the enterprise framework.
- Run user requirement sessions and workshops and lead the functional and technical team throughout the project.

University of Arizona

Enterprise, Academic Advising, Student Services

Project Lead

Solution Architect

Jan 2019 – June 2022

- Led the university-wide implementation of Salesforce with the first phase focused on student success and case management across undergraduate and graduate populations, followed by service cloud, event management, and corporate partners.
- Supported future roadmap project planning including foundational and department-level Salesforce initiatives as part of the enterprise framework.
- Managed multiple scrum teams delivering end-to-end technical architecture, functional support, and change management, and supported product owners with story creation and refinement.
- Helped develop a robust dev ops plan using continuous integration and sandbox deployments with Gearset and Gitlab.

University of Arizona, Eller College of Management

Recruiting and Admissions

Project Lead

- Ran user requirement sessions and workshops and lead the functional requirements team.
- Gathered project requirements for an implementation focused on recruitment and admissions for multiple graduate colleges.

Kara McIntyre*Length of Tenure at Accenture:***Functional Lead****8 years**Solution Architect
Jun 2018 – Jun 2019

- Led the solution design as it pertained to Salesforce configuration, custom development, and integration with the student information system (SIS).

University of Maine System**Recruiting and Admissions**Project Lead
Solution Architect
Jun 2018 – Aug 2018

- Led the assessment of the university system's nine campuses, including nine unique TargetX environments, to identify pain points and opportunities. Led user requirement sessions and workshops and managed the functional team.
- Created a project roadmap recommending combining the unique TargetX environments into one enterprise EDA (Education Data Architecture) environment, including detailed recommendations to identify the approach and ensure success.
- Oversaw the development of and authored the health check assessment documentation and led assessment readout sessions.

University of Southern California, Gould School of Law**Recruiting and Admissions**Project Lead
Solution Architect
Jul 2017 – Oct 2017

- Analyzed marketing, student recruitment, application, and admission business processes.
- Ran user requirement sessions and workshops and led the functional requirements team.
- Gathered user stories and requirements and documented Salesforce and Pardot configuration and development design.

University of Miami Recruiting and AdmissionsProject Lead
Solution Architect
Apr 2017 – May 2019

- Developed an open-source solution for student recruitment as part of the Salesforce Force for Change Grant.
- Designed and implemented the solution, then presented, collaborated, and tested it with Salesforce.org and other higher education institutions.
- Packaged the application and put together the GitHub repository with extensive technical, implementation, user, and learning guide documentation.

University of California, San Diego, Rady School of Business**Recruiting and Admissions**Project Lead
Mar 2017 – Jul 2018

- Gathered project requirements for an implementation focused on course registration and enrollment for the Rady School of Business.
- Configured Salesforce's Higher Education Data Architecture (HEDA) for course enrollment according to university requirements.
- Migrated prospect data from four stakeholder groups to Salesforce.
- Created two separate Opportunity processes for certificate program applications and business organization consultations.

University of Wisconsin Oshkosh**Recruiting and Admissions**Project Lead
Salesforce Administrator
Aug 2016 – Feb 2017

- Gathered project requirements for an implementation focused on undergraduate recruitment and event registration.
- Designed and configured Salesforce's Higher Education Data Architecture (HEDA) according to university requirements and built a solution to manage prospects directly in Salesforce instead of the SIS.
- Designed and created custom event registration and territory management processes.

Kara McIntyre

Functional Lead

Length of Tenure at Accenture:
8 years

Northern Arizona University

Student Services

Project Lead

Salesforce Administrator

Aug 2015 – Oct 2016

- Managed detailed design and implementation of a student services operating model, business process, and technology transformation impacting 250,000 students in 3 countries.
- Partnered with university leaders to translate a high-level strategy into a detailed program roadmap, facilitated selection of Phase 1 delivery locations, and shaped the project plan.
- Established and oversaw project management office (PMO) processes monitoring delivery.

Arizona State University

Recruiting and Admissions

Project Lead

Salesforce Administrator

Mar 2015 – Jul 2015

- Gathered requirements for various projects focused on improving the current system within the area of undergraduate and graduate recruitment.
- Advised project teams on the best methods and designs to accomplish specific enhancements and created specification documents to detail the designs decided upon and submitted them for review.
- Built required fields, workflows, and other necessary pieces in a testing sandbox to demonstrate how the designs would function.
- Created test cases and tested the designs throughout the building process.

University of North Texas

Academic Advising

Project Lead

Salesforce Administrator

Oct 2014 – Apr 2015

- Ran meetings and provided direction to team members as the project lead.
- Gathered project requirements and assisted with solution design document.
- Created data mapping document, data model, current and future process flowcharts and other documentation and ran training sessions for admins and a subset of end users.
- Built required objects, fields, workflows, and other necessary pieces in Salesforce to replace two current advising systems and house information from the system of record and assisted with data migration and integration.

Education, Certifications, and Affiliations:

- Bachelor of Arts, English with Minor in History, Fresno Pacific University
- Salesforce Certified Education Cloud Consultant
- Salesforce Certified Sharing and Visibility Architect
- Salesforce Certified Data Architect
- Salesforce Certified Sales Cloud Consultant
- Salesforce Certified Service Cloud Consultant
- Salesforce Certified Advanced Administrator
- Salesforce Certified App Builder
- Salesforce Certified Administrator

Joseph (Joe) Reeves

Communications and Marketing Lead

Length of Tenure at Accenture:
3 years



Joe brings experience working alongside higher education clients on change programs. As part of Accenture’s Education Practice, Joe has managed the development and execution of stakeholder engagement and communication plans with a focus on identifying and executing key messaging to diverse audiences across an education institution.

Summary of experience

- Higher education experience including two prior engagements with George Mason University.
- Developed and communicated strategy solutions to stakeholders and executives for 6+ public service clients.
- Has performed stakeholder/market segmentation and analysis for strategy implementation and change management delivery.

Relevant experience (ordered by relevance)

Private University
Student Experience Journey

Student Experience Consultant

November 2022 – March 2023

To increase student retention and completion rates, a private university hired Accenture to evaluate and improve the end-to-end student experience. As a Student Experience Consultant, Joe:

- Developed end-to-end **student experience** journey map with recommendations to increase student completions.
- Created virtual workshop materials and facilitated multiple faculty/staff and alumni/student workshops, to identify 20+ moments that matter in the student experience journey via key questions, directed content, and segmented workshop materials.
- Synthesized leading student priorities from 250 aggregate stakeholder sources to drive final recommendations for completions.
- Developed **tailored communications plans** to deliver recommendations to disseminate to larger University stakeholder audience

Public Agency
Transition Strategy and Management Program

March 2023 - Present

- **Prepared all communications for executive leadership on key changes occurring for the client** – these included communications on behalf of the CEO and his team.
- Served as primary liaison for both outgoing and incoming teams, facilitating information exchange, communications, performance management, and transition planning.
- Developed and executed 30-60-90-180+ day transition plan for incoming team outlining knowledge transfer plan, integration to culture and touchpoints, and communications regarding data management, operational changes, and core operations performance tracking.
- Identified key metrics surrounding consumer sentiment, confidence, and feedback segmented by customer type and service area.
- Developed benchmarks, visualizations, and filters for final KPIs to track progress against communicated goals.

Joseph (Joe) Reeves*Length of Tenure at Accenture:***Communications and Marketing Lead****3 years****Private University****Market Entry Strategy and Sizing**

Market Sizing Lead

September 2022 -

November 2022

In an effort to justify investment in a college of lifetime learning, Accenture sized and analyzed entry strategies.

- Established four core market segments to guide new market sizing analysis and **identified six key stakeholder segmentations for market.**
- Hosted client workshop with Deans and Executives to ideate and lay groundwork for college stand up and next steps.
- Developed final market research deliverable, communicating the strongest case for cash infusion, delivered to University President, and State Legislature

George Mason University**Chart of Accounts Redesign**

Senior Analyst

November 2021 – February

2022

Engaged to evaluate current state of Chart of Accounts.

- Conducted survey of 130+ University-wide stakeholders to develop an initial understanding of existing COA processes and frictions.
- Hosted 15+ workshops with stakeholders from across the university community to build on process maps and understand impacts of future COA redesign.
- Created 25 step-by-step process maps outlining financial operations across academic and non-academic Units, **ensuring each process was digestible for Leadership and employees in the COA system**

George Mason University**IT Software Rationalization**

Senior Analyst

November 2021 – January

2022

- Benchmarked GMU IT governance structure and application licensing offerings against 6 top-tier R1 research institutions
- Conducted in-depth interviews with Academic Units, uncovering frictions in the license management processes.
- **Developed and identified the needs of 10 stakeholder personae - facilitated an understanding of these requirements**, enabling targeted solution identification in the licenses needed by GMU Community

Education, Certifications, and Affiliations:

- B.A, Politics (American Government), University of Virginia
- Lean Six Sigma Green Belt

Dilshad Shahid

Chief Architect & Infrastructure Lead

*Length of Tenure at Accenture:***4 years**

Dilshad is a 21x Salesforce certified practitioner based in Austin, TX. She began her Salesforce career in 2017 as an Apex developer and currently contributes as a Salesforce technical delivery lead, application architect and solution architect.

Dilshad co-leads Accenture's Trailblazers on the Rise (TOTR), a 1,700+ Salesforce virtual networking and learning community at Accenture that she helped kick off in Feb 2020. She promotes Salesforce Education Cloud by arranging for Lunch and Learn sessions to amplify and encourage certification and set up our Salesforce Education Cloud Community of Practice (CoP) to support interested colleagues.

Dilshad graduated from Princeton University in 1995 with a Bachelor's of Science in Chemical Engineering and a minor in Biology. She obtained a Master's degree in Computer Science from NYU in 2003.

Summary of experience

- 6 years of experience using and implementing Salesforce across multiple industries.
- Over 15 years of technical architecture, development and team leadership experience.

Relevant experience:

Regional utilities company

Salesforce Technical Architect
Mar 2023 – Sept 2023

- Technical lead for \$70 million transformational project with Field Service, Youreka and Lemur
- Guided technical and environment strategy for the Mobile Workforce workstream

International car maker

Salesforce Solution Architect/Delivery Lead
Feb 2022 – Dec 2022

- Oversaw delivery of key features for an internal portal powered by Experience and Sales Cloud

Alarm monitoring service company

Salesforce Technical Architect
Nov 2021 – Feb 2022

- Delivered technical assessment for 2022 Salesforce roadmap which was the foundation for future project phases
- Supported project lead and functional team members in solution design and estimation

National insurance company

Salesforce Technical Delivery Lead
Feb 2021 – Sep 2021

- Salesforce development lead for modernized and optimized workflows in the claims experience
- Oversaw project status and redefined the team structure and approach for the project

Dilshad Shahid

Chief Architect & Infrastructure Lead

Length of Tenure at Accenture:
4 years

**Bank holding
company, wealth
management**

Salesforce Technical Lead
Oct 2020 – Dec 2020

- Assessed migrating a Salesforce Classic custom application to Financial Services Cloud (FSC).

Education, Certifications, and Affiliations:

- Bachelor of Arts, Chemical Engineering, Princeton University
- Masters in Computer Science
- Various Salesforce Certifications:

CERTIFICATIONS

CERTIFIED

Education Cloud Consultant

CERTIFIED

System Architect

CERTIFIED

Application Architect

CERTIFIED

Integration Architect

CERTIFIED

Sharing and Visibility Architect

CERTIFIED

Data Architect

CERTIFIED

Development Lifecycle and Deployment Architect

CERTIFIED

Identity and Access Management Architect

CERTIFIED

Tableau CRM and Einstein Discovery Consultant

CERTIFIED

Field Service Consultant

CERTIFIED

Platform Developer I

CERTIFIED

Experience Cloud Consultant

(in progress)

CERTIFIED

OmniStudio Developer

CERTIFIED

OmniStudio Consultant

CERTIFIED

Sales Cloud Consultant

CERTIFIED

Service Cloud Consultant

CERTIFIED

Platform App Builder

CERTIFIED

Administrator

CERTIFIED

Advanced Administrator

CERTIFIED

Marketing Cloud Email Specialist

CERTIFIED

User Experience Designer

ACCREDITED

Financial Services Cloud

Accenture

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George Mason University

Student Lifecycle Transformation

GMU-1859-23 | Proposal Addendum | October 30, 2023

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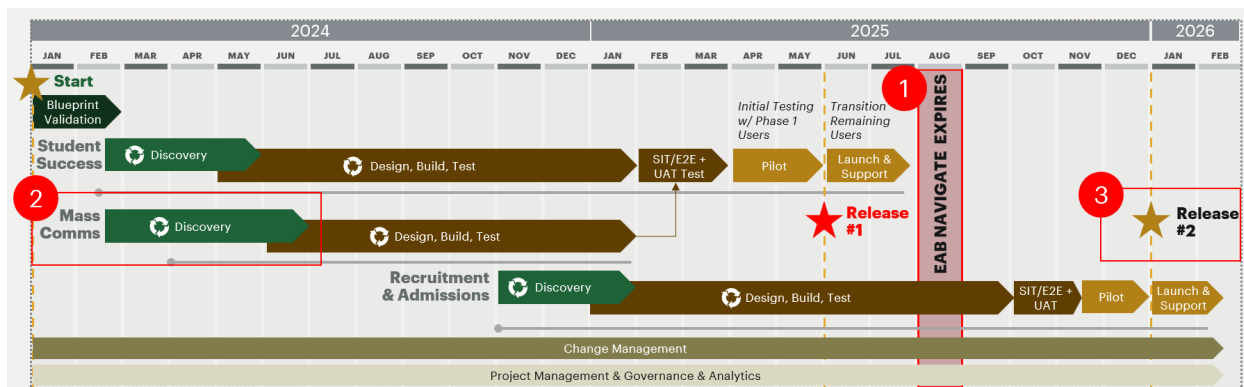
Introduction

Following the discussion with the Mason team on Monday October 23rd, we have produced this Proposal Addendum to provide the specific updates to the initial proposal that we have made. We start with a summary of the timeline and team aspects of our proposal and follow with the detailed listing of changes to our initial submission.

Timeline

There were three aspects of the timeline discussed on October 23rd:

1. **EAB Navigate Contract Expires in August 2025:** We still have confidence that we can deliver Student Success and Mass Communications functionality prior to the August 2025 contract expiration of EAB Navigate, assuming a project start in January 2024.
2. **Mass Communications:** Our Marketing Cloud Lead, Darren Dean, will be actively engaged in January during the Blueprint Validation and Discovery phase to help Mason with their platform selection.
3. **Recruiting and Admissions:** One of our first activities in January 2024 will be to review the impact of the timeline shift on the anticipated launch date of Recruiting and Admissions Functionality to minimize the impact to the admissions cycle.



Team Structure

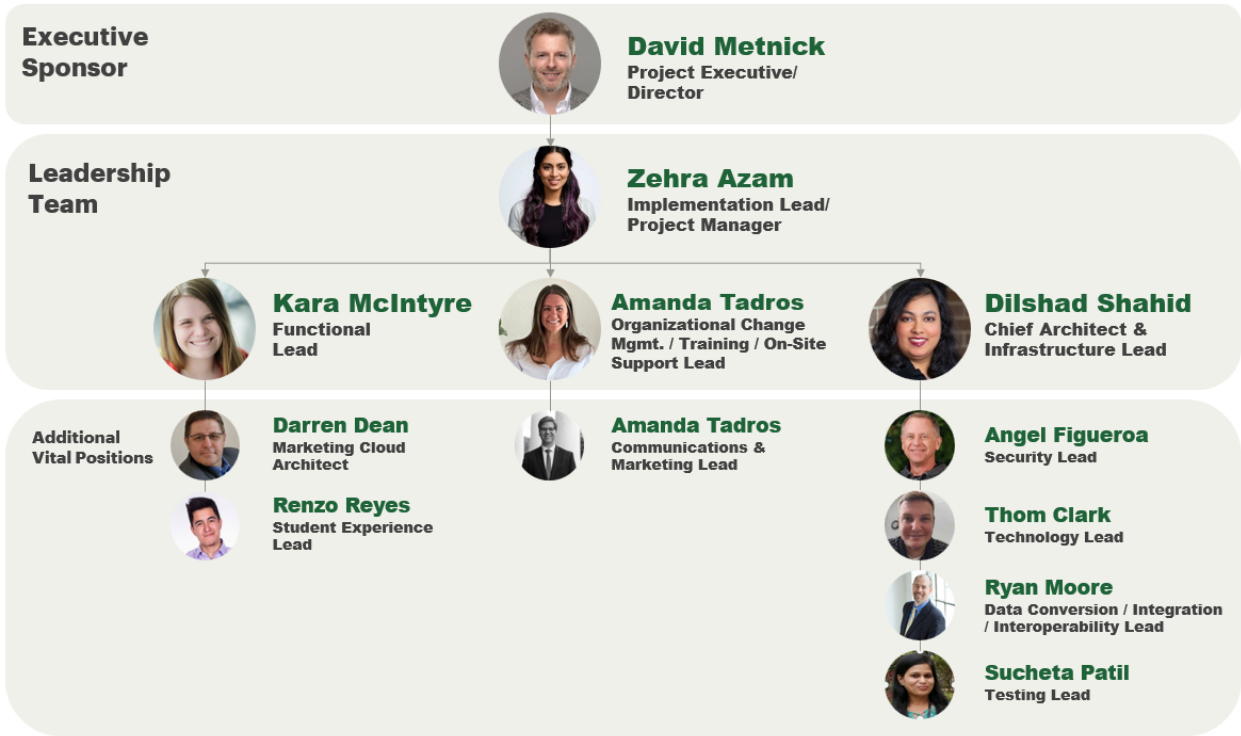
Given a start date of January 2024, we can now confirm our delivery team. The diagram below represents the team we expect to fill requested Vital Positions.

Mason can fully expect the team below to deliver on the approaches and methodologies outlined in our written response and oral presentation, and to be the glue to connect dots across all the workstreams.

With Megan Roddy pursuing opportunities outside of Accenture, we recommend Amanda Tadros as the Organizational Change Management and Training lead. She has focused her career on higher education, delivering transformational change to multiple institutions. She knows what works and what doesn't work in Higher Education change projects and is excited to collaborate with Mason on this project. To ensure Amanda is the right fit, we are offering Mason the opportunity to interview her along with two alternative options, Rachel Moses and Shelagh Diederich.

Mason will continue to have access to the Advisory Group that was shared in the original proposal, presented at orals, and engaged during the October 23rd discussion.

You can find a detailed overview of each team members in our original proposal and in Accenture GMU Proposal Proposal Additional Resumes.doc.



Detailed Updates to Initial Response

The following changes to Accenture’s submitted proposal for GMU-1859-25, dated April 28, 2023, have been made.

- 1) Add Figure 18a, bottom of Page 69. Added to provide clarity on expectations on Mason. Diagram provided as part of Orals.

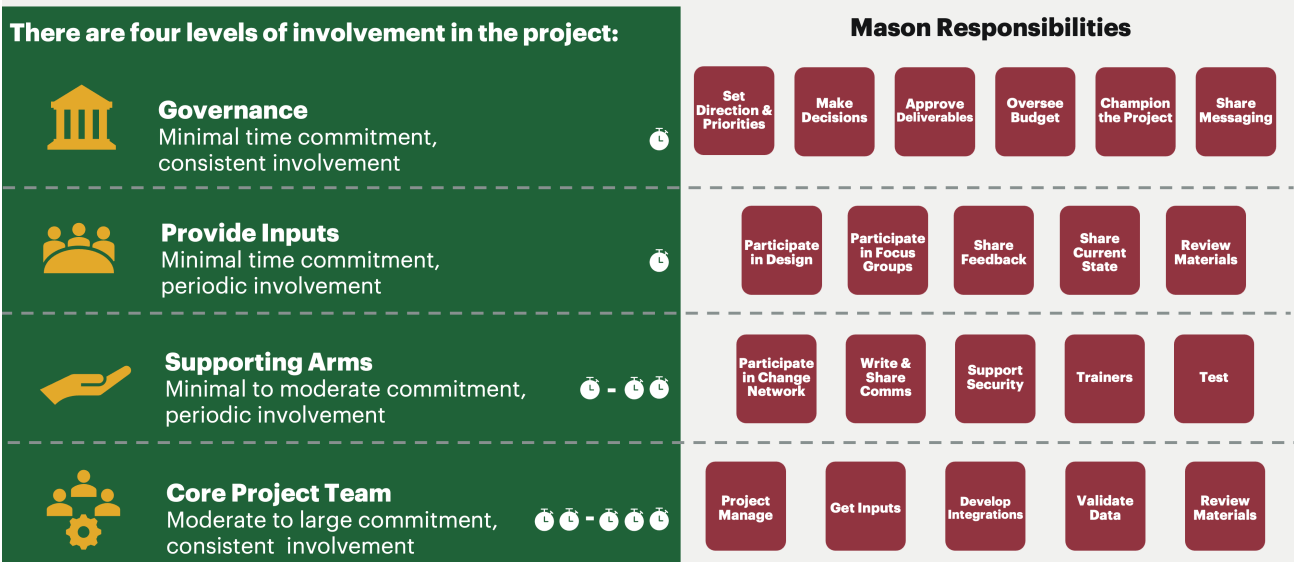


Figure 18a. Mason Responsibilities in the side-by-side team.

- 2) Add Figure 18b, bottom of Page 69. Added to provide clarity on expectations on Mason. Diagram provided as part of Orals.

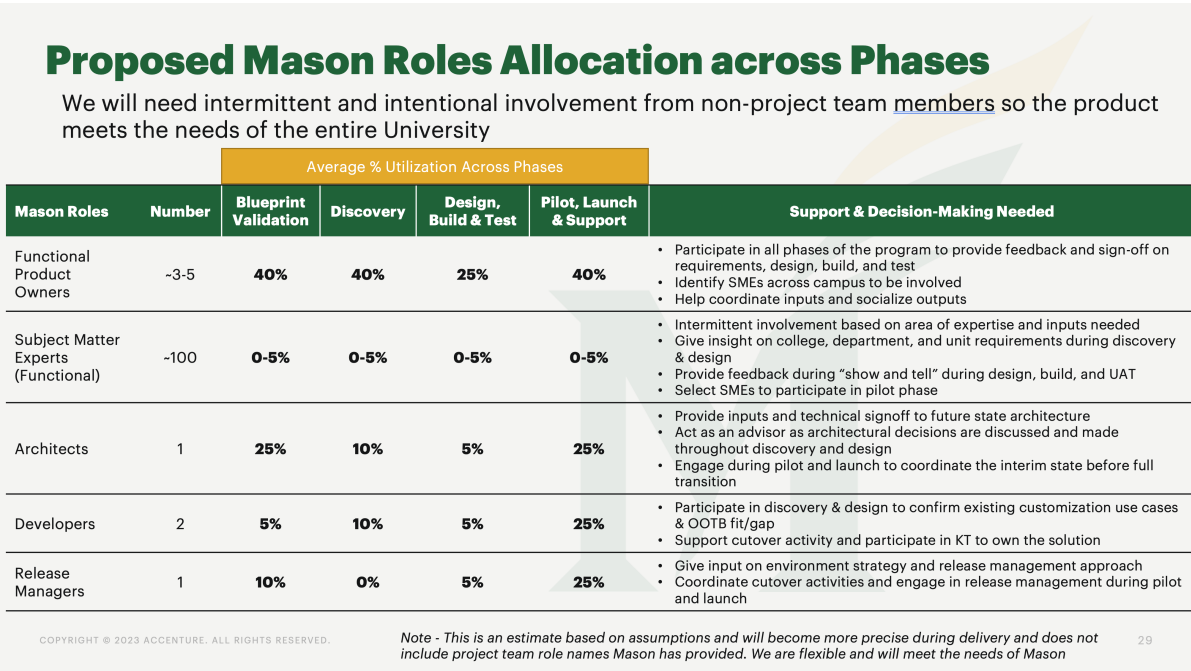


Figure 18b. Mason resource utilization in the side-by-side team.

- 3) Add table as Figure 31a, above Figure 32 on page 81. Added to incorporate details from the negotiation.

Integration Name
Common App
Nova Student System
Ellucian Banner
Salesforce to Data Mart
Mason 360
Tableau
Marketing Cloud
Microsoft Outlook
CTI

Figure 31a. List of expected integrations

- 4) Change Pricing Narrative on Page 188. Updated to reflect negotiations.

~~We estimate a total fixed price for this work to be \$13,000,000, which includes all the Professional Services from Accenture for this work. This represents an investment of approximately \$1,500,000 from the market rates we would charge for this work. This investment reflects the strategic nature of Mason to Accenture.~~

We estimate a total fixed price, under a fixed capacity model for this work to be \$8,750,000.

- 5) Remove expected billing profile from Page 188 as superseded by negotiations. Billing profile to be discussed as part of Statement of Work writing.

~~We provide the expected billing profile in the table below, and it:~~

Billing date	Invoiced amount	Billing Date	Invoice
July, 2023	\$ 126,500	July, 2024	\$ 821,000
August, 2023	\$ 269,500	August, 2024	\$ 841,000
September, 2023	\$ 355,300	September, 2024	\$ 767,000
October, 2023	\$ 322,300	October, 2024	\$ 738,000
November, 2023	\$ 343,200	November, 2024	\$ 765,000
December, 2023	\$ 236,500	December, 2024	\$ 582,000
January, 2024	\$ 292,600	January, 2025	\$ 729,000
February, 2024	\$ 467,500	February, 2025	\$ 743,000
March, 2024	\$ 552,200	March, 2025	\$ 757,000
April, 2024	\$ 561,000	April, 2025	\$ 711,000
May, 2024	\$ 719,400	May, 2025	\$ 570,000
June, 2024	\$ 654,000	June, 2025	\$ 76,000
\$13,000,000			

6) Add two new Key Assumption, as discussed during negotiations. Add as additional bullet points to the top on page 190.

- Student Communications: We will create a marketing and communication campaign template for GMU to leverage to create the customized communication campaign by audience segment.

The campaign template components will include non-audience segment specific website development, marketing collateral, newsletters and videos.

To create the campaign we will:

- Review goals of the campaign with Mason
- Identify the audience segments
- Develop the marketing and communication material templates
- Develop a set of criteria to measure performance, including surveys from focus groups, and clicks on Mason’s public-facing and internally facing website (details on the website are provided in the section on ‘Website’ below)

Launch the marketing campaigns generated by GMU. We will monitor incoming results and feedback and adjust the marketing plan, and campaign as needed for improved outcomes.

- We will work with Mason's communication and marketing teams to deliver an initial data extension and templates for bulk applicant communications related to prospect marketing, program interests, and applications. Marketing Cloud functionality delivered will be foundational with templates included for GMU to use to personalize across audience segments and GMU departments.

7) Update Timeline diagrams to reflect start date of 1/1/24, as discussed during negotiations:

7a) Replace Figure 27

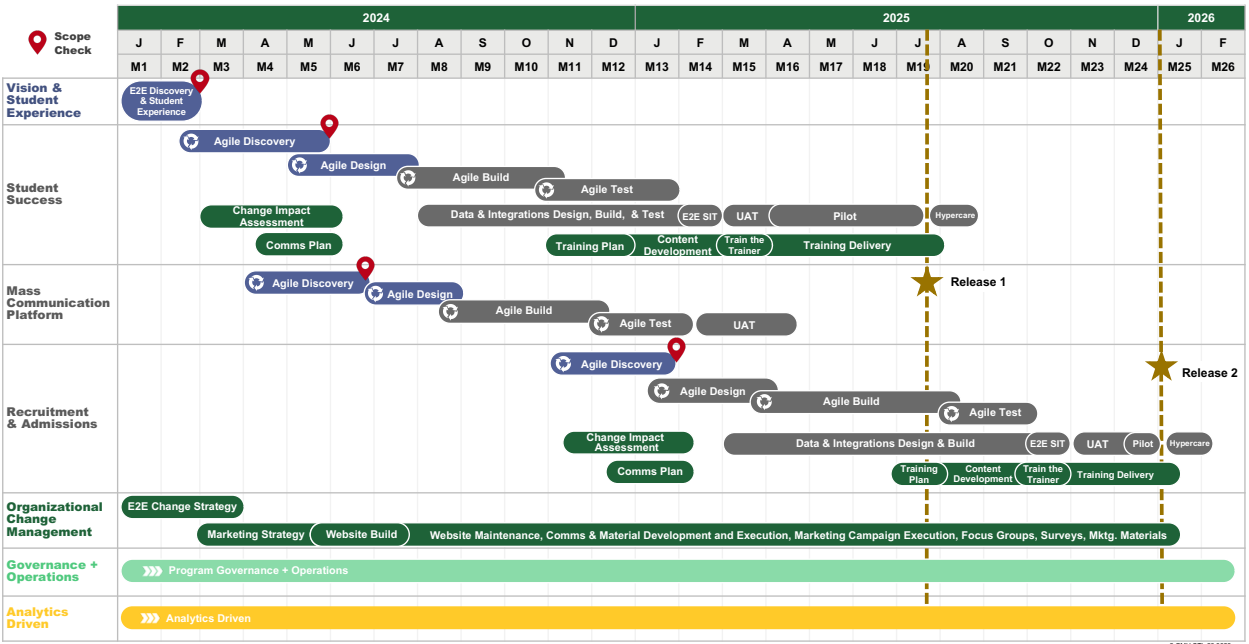
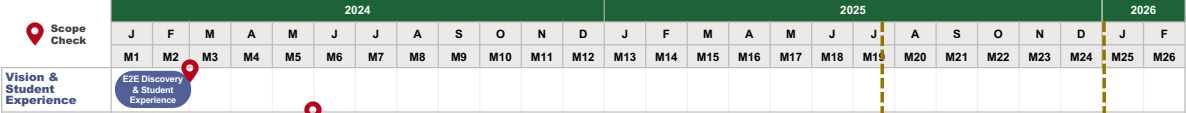
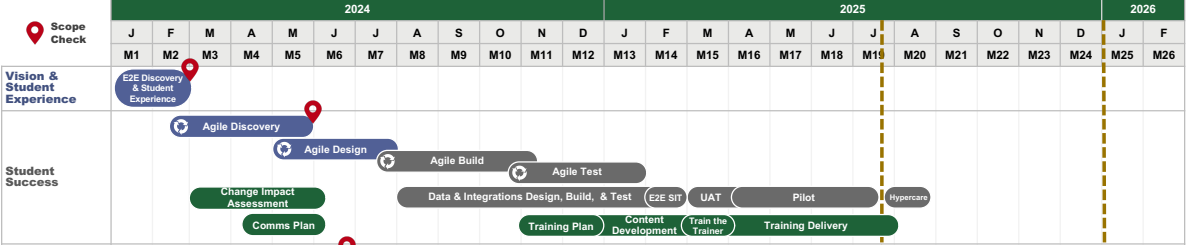


Figure 27. Our proposed Timeline is designed to meet your planned implementation dates & academic schedule.

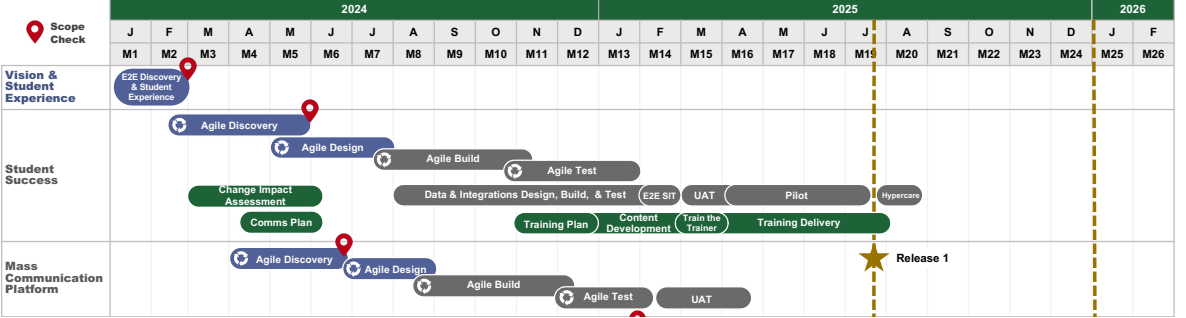
7b)Replace Timeline snippet at top of page 79



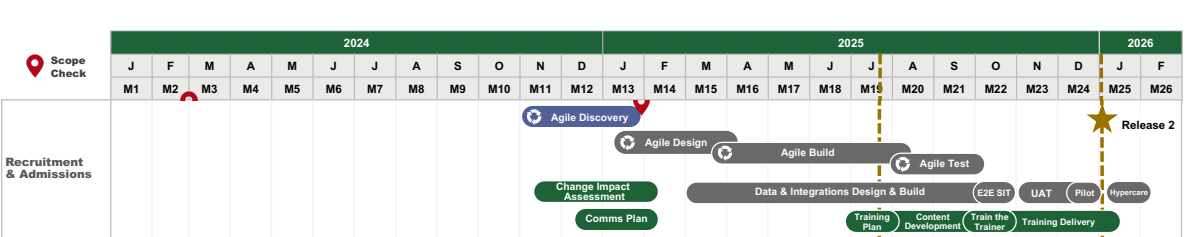
7c)Replace Timeline snippet at bottom of page 80



7d) Replace Timeline snippet at top of page 82



7e) Replace Timeline snippet at bottom of page 84



7f) Replace Figure 34

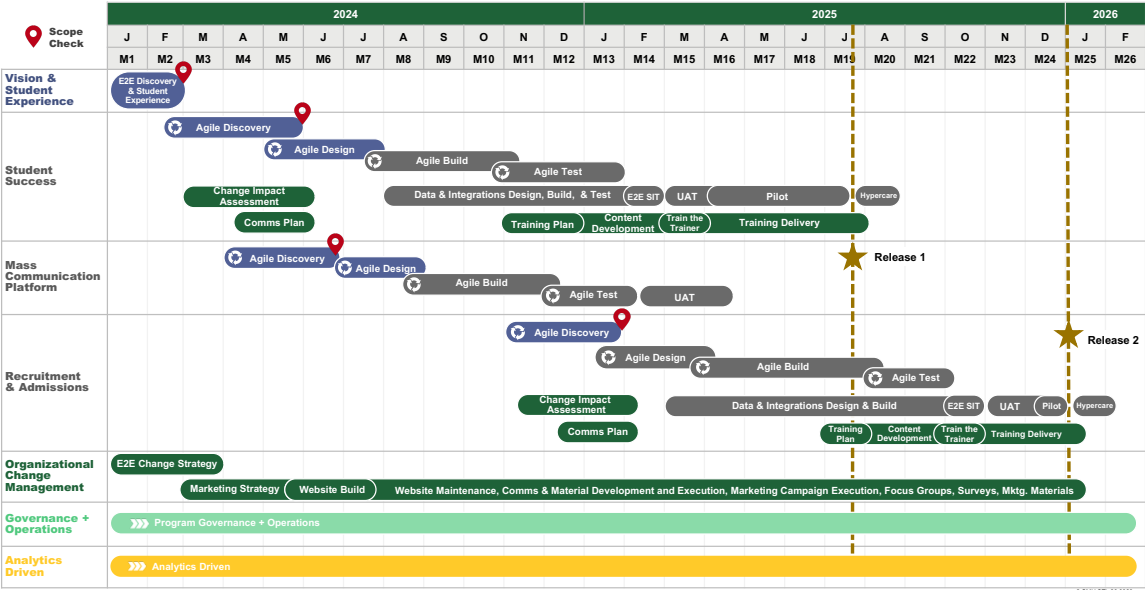


Figure 34. Our proposed Timeline is designed to meet your planned implementation dates and academic schedule.

8) Remove timing considerations paragraph from Page 84, as this will be discussed during Statement of Work conversations.

~~Accounts for the academic calendar for applicants, students, staff, and faculty.~~

~~We designed our delivery team in a way that overlaps the phases to support recruitment and admissions discovery during the summer of 2024 when those activities tend to be reduced. We designed our delivery team in a way that overlaps the phases to support recruitment and admissions discovery during the summer of 2024 when those activities tend to be reduced.~~

- 9) Replace Figure 13 with our leadership reporting structure for this program, as requested during negotiations.

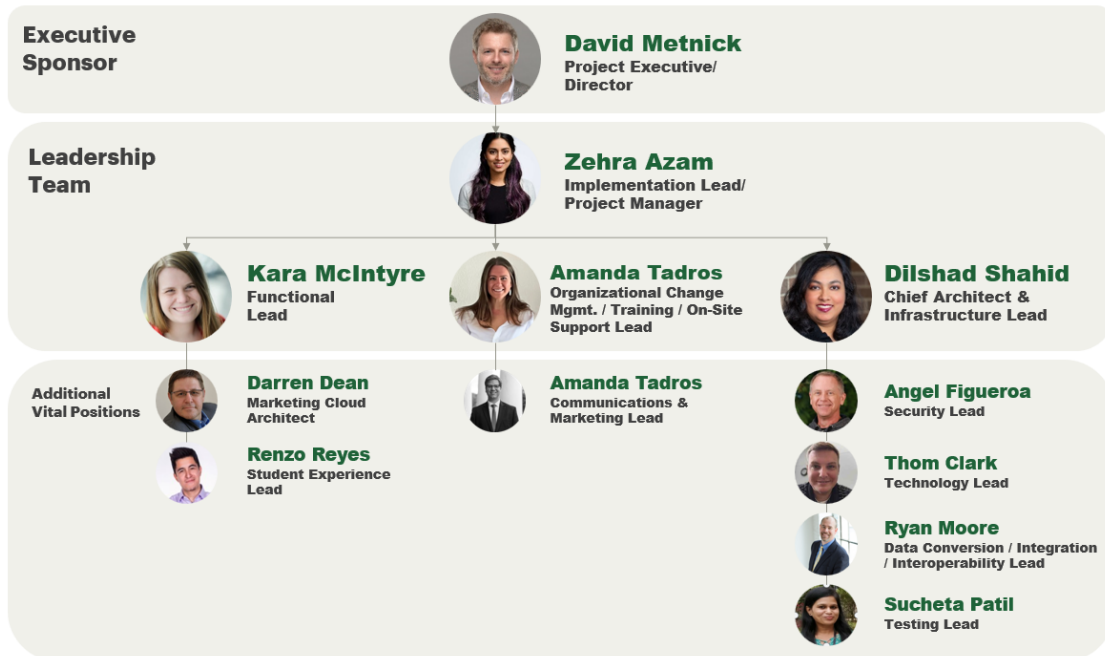


Figure 13. Our leadership teams bring years of higher education experience and has clear accountability for their workstreams.

- 10) Update resource names and resumes. Resumes are found in Accenture GMU Proposal Additional Resumes.doc.:
- 10a) Replace Scott Fry's Resume with Zehra Azam's Resume (pages 28&29)
- 10b) Remove references to Scott throughout the response

Page	Content
11	Scott Fry—Project / Implementation 10+ years leading strategy and implementation projects in Higher Education and Public Sector
87	Our Project Manager, Scott Fry , will lead our team in implementing the Student Lifecycle Transformation using an Agile approach.
167	These activities for our team will be managed our Project Manager, Scott Fry , systems integration and change management in large-scale transformation projects.
167	Our project manager, Scott Fry , will collaborate and take direction from the Mason PMO to coordinate project management efforts.
182	Scott is a Senior Manager in Accenture's Education Practice and is Accenture's National Salesforce Consulting lead for Higher Education. Scott has significant consulting and industry experience in education, as a former classroom teacher, school leader, university lecturer, and education-focused consultant. Scott has supported higher education universities with implementations of technologies to support institutional goals, specifically with Salesforce and Salesforce-related packages. Scott will be the main point of contact for Mason and will be the bridge between Accenture and Mason. He will be responsible for all the deliverables and timely implementation.

10c) Replace Dom Baumgartner's Resume with Kara McIntyre's Resume (pages 30&31)

10d) Replace Megan Roddy's Resume with Amanda Tadros' Resume (pages 37&38)

10e) Remove references to Megan throughout the response

Page	Content
11	Megan Roddy—Change Management 10+ years of experience leading change management and higher education institutions
123	Megan Roddy Change ManagementLead
149	The training lead, Megan Roddy, has extensive experience in training and Learning & Development in the context of transformation, empowered by new systems. As a Certified Professional in Talent Development (CPTD, ATD), she spent the first 6 years of her career doing Learning & Development at non-profits at higher education institutions. After joining Accenture, she spent 3.5 years as a Training Lead at another large, public, multi-campus R1 university system and oversaw the development of more 80 courses, 300 job aids, and 30 video, and oversaw training delivery to achieve successful training completion rates with over 310,000 total course completions. As a leader in Accenture's higher education practice, Megan understands the needs and nuances of higher education at large, and the student lifecycle (and associated systems that support it). Megan will lead the training efforts, along with a team reporting to her, that will support the development of the training plan, and the materials outlined in the plan.

10f) Replace Vidhya Raghaven's Resume with Gabriela Rodriguez's Resume (pages 37&38)

10g) Replace Jason Thomas' Resume with Dilshad Shahid's Resume (pages 35&36)

10h) Remove references to Jason throughout the response

Page	Content
35	With Jason's experience he has been managing large scale, complex programs for 12+ years and has worked with application teams.
171	Our proposed Chief Architect, Jason Thomas, will verify that all components of the solution individually, and in parallel, are being configured/built to address Mason's requirements.

11) Add clarification text, as requested during negotiations, on the fixed price/fixed capacity model. Add this text following Figure 23 on page 72:

We plan to work in an Agile manner with Mason under our fixed price/fixed capacity model. At regular intervals, including at the end of the Discovery/Blueprint phase, Mason and Accenture will together assess the aims of the next logical portion of work and the associated deliverables. Based on our shared resources, we will plan to utilize the team to maximize the amount of work that gets done in pursuit of those aims and deliverables. Throughout the course of the project, new priorities, as well as the realities of the work required to complete deliverables, may allow

us to shift hours away from some of our deliverables in favor of more attention to others. If there is more work to do than can get done by our shared resources in the time available, we will jointly explore work how to reduce the work (could be deferring deliverables or reducing complexity) to fit within the capacity available.

- 12) Add a consolidated list of deliverables, as requested during negotiations. Add table as Figure 59a, on page 122.

Activity	Deliverables
1. Planning	Project Schedule *
	Requirements Confirmation Document
2. Requirements Management	Requirements Document(s) *
	Requirements Traceability Plan and Matrix (RTM) *
3. Design and Development	Architectural Vision
	System Traceability Model
	Design and Development Plan
	Conceptual Design
	High Level Design (HLD)
	Solution Detailed Design (SDD)
	Solution Architecture Design (SAD)
	Functional and Technical Design Documents *
	Configuration Management Plan
	Business Use Case(s) *
	Business Rules Documentation *
	User Interface Specification(s)
	System Security Plan *
	Reports and Forms Design Documents *
	Process Flow Document(s) *
	Glossary of Terms and Acronyms *
4. Testing	Master Test Plan
	Draft Automated Testing Scripts
	Final Automated Testing Scripts
	Test plans for each testing phase
	Draft Test cases
	Final Test cases
	Completion of all applicable testing cycles
	Draft Security Test Plan Report
	Final Security Test Plan Report
	UAT Report and Results
4. Data Conversion and Migration	Draft System Integration Test Readiness Checklist
	Final System Integration Test Readiness Checklist
	Data Conversion and Migration Plan
	Data dictionary, data models, data flow models *
5. Implementation	Draft Conversion and Migration Results reports
	Final Conversion and Migration Results reports
	Phase Implementation Plans
	Organizational Change Management Plan
	Training Plan
	Knowledge Transfer Plan

Activity	Deliverables
	Completed training and training materials
	Training logs to track users' training progress
	Completed pilot implementation(s)
	Completed Masonwide implementation
	Formal System Acceptance Report
6. Post-Implementation Support	Defects log
	Final, updated deliverable documents and supporting work product documentation.
	Source/object codes for all software components

Figure 59a. Consolidated list of deliverables

- 13) Add additional text relating to tools validation, following the Pardot conversation during negotiations. Add the text below Figure 30 on Page 79.

Tools/Product validation. The Discovery phase will look at the Salesforce products procured by Mason to establish the optimum way of delivering Mason's outcomes. Specific attention will be paid to Mason's existing Pardot capability, which may have overlapping functionality with Marketing Cloud. We will jointly produce an options analysis that considers the benefits of retaining Pardot and the impact this has on the remainder of the program.



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-1859-23

ISSUE DATE: March 13, 2023

TITLE: Student Lifecycle Transformation

PRIMARY PROCUREMENT OFFICER: Grace Lymas, Assistant Director, glymas@gmu.edu

SECONDARY PROCUREMENT OFFICER: James F. Russell, Director, jrussell@gmu.edu

QUESTIONS/INQUIRIES: E-mail all inquiries to both Procurement Officers listed above, no later than 4:00 PM Eastern Time (ET) on March 21, 2023. **All questions must be submitted in writing.** Responses to questions will be posted on the [Mason Purchasing Website](#) by 5:00 PM ET on March 31, 2023. Note: Questions must be submitted in WORD format. Also see section III. COMMUNICATION, herein.

PROPOSAL DUE DATE AND TIME: April 14, 2023 @ 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: _____

Date: _____

DBA: _____

Address: _____

By: _____
Signature

FEI/FIN No. _____

Name: _____

Fax No. _____

Title: _____

Email: _____

Telephone No. _____

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

SWaM Certification Number: _____

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.



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GMU-1859-23

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- I. **PURPOSE:** The purpose of this Request for Proposal (RFP) is to solicit proposals to establish a contract through competitive negotiations with an experienced vendor to design, develop, and implement a holistic systems and organizational transformation effort that leverages our recently purchased Salesforce suite of tools for George Mason University. George Mason University (herein after referred to as “Mason,” or “University”) is an educational institution and agency of the Commonwealth of Virginia.
- II. **PURCHASING MANUAL/GOVERNING RULES:** This solicitation and any resulting contract shall be subject to the provisions of the Commonwealth of Virginia *Purchasing Manual for Institutions of Higher Education and their Vendor's*, and any revisions thereto, and the *Governing Rules*, which are hereby incorporated into this contract in their entirety. A copy of both documents is available for review at: <https://vascupp.org>
- III. **COMMUNICATION:** Communications regarding the Request For Proposals shall be formal from the date of issuance until a contract has been awarded. Unless otherwise instructed offerors are to communicate with only the Procurement Officers listed on the cover page. Offerors are not to communicate with any other employees of Mason.
- IV. **FINAL CONTRACT:** ATTACHMENT B to this solicitation is Mason’s standard two-party contract. It is the intent of this solicitation to base the final contractual documents off of Mason’s standard two-party contract and Mason’s General Terms and Conditions. Any exceptions to our standard contract and General Terms and Conditions should be denoted in your RFP response. Other documents may be incorporated into the final contract, either by way of attachment or by reference, but in all cases this contract document and Mason’s General Terms and Conditions shall jointly take precedence over all other documents and will govern the terms and conditions of the contract.

As a public institution of higher education in Virginia Mason cannot agree to any of the following terms in any documents:

- A. An express or implied waiver of sovereign immunity.
- B. An agreement to indemnify, defend or hold harmless any entity.
- C. An agreement to maintain insurance.
- D. An agreement providing for binding arbitration.
- E. An agreement providing for the payment of attorneys' fees, costs of collection, or liquidated damages.
- F. Waiver of jury trial.
- G. Choice of law or venue other than the Commonwealth of Virginia.

Contracts will only be issued to the FEI/FIN Number and Firm listed on the signed cover page submitted in your RFP response. Joint proposals will not be accepted.

- V. **ADDITIONAL USERS:** It is the intent of this solicitation and resulting contract(s) to allow for cooperative procurement. Accordingly, any public body, public or private health or educational institutions, or affiliated corporations may access any resulting contract if authorized by the contractor.

Participation in this cooperative procurement is strictly voluntary. If authorized by the Contractor(s), the resultant contract(s) will be extended to the entities indicated above to purchase goods and services in accordance with contract terms. As a separate contractual relationship, the participating entity will place its own orders directly with the Contractor(s) and shall fully and independently administer its use of the contract(s) to include contractual disputes, invoicing and payments without direct administration from the University. No modification of this contract or execution of a separate agreement is required to participate; however, the participating entity and the Contractor may modify the terms and conditions of the contract to accommodate specific governing laws, regulations, policies, and business goals required by the participating entity. Any such modification will apply solely between the participating entity and the contractor.

The University may require the Contractor provide semi-annual usage reports for all entities accessing the contract. The University shall not be held liable for any costs or damages incurred by any other participating entity as a result of any authorization by the Contractor to extend the contract. It is understood and agreed that the University is not responsible for the acts or omissions of any entity and will not be considered in default of the contract no matter the circumstances.

Use of the resulting contract(s) does not preclude any participating entity from using other contracts or competitive processes as needed.

- VI. **eVA BUSINESS-TO-GOVERNMENT VENDOR REGISTRATION:** The eVA Internet electronic procurement solution, website portal www.eVA.virginia.gov, streamlines and automates government purchasing activities in the Commonwealth. The eVA portal is the gateway for vendors to conduct business with state agencies and public bodies. All vendors desiring to provide goods and/or services to the Commonwealth shall participate in the eVA Internet eProcurement solution by completing the free eVA Vendor Registration. All bidders or offerors agree to self-register in eVA and pay the Vendor Transaction Fees prior to being awarded a contract. Registration instructions and transaction fees may be viewed at: <https://eva.virginia.gov/>

- VII. **SWaM CERTIFICATION:** Vendor agrees to fully support the Commonwealth of Virginia and Mason's efforts related to SWaM goals. Upon contract execution, eligible vendors (as determined by Mason and the Virginia Department of Small Business and Supplier Diversity) shall submit all required documents necessary to achieve SWaM certification to the Department of Small Business and Supplier Diversity within 90 days. Vendors currently SWaM certified agree to maintain their certification for the duration of the contract and shall submit all required renewal documentation at least 30 days prior to existing SWaM expiration. <https://www.sbsd.virginia.gov/>

- VIII. **SMALL BUSINESS SUBCONTRACTING PLAN:** All potential offerors are required to fill out and submit Attachments A with their proposal.

Note: Invoices shall only be submitted to Mason by the entity awarded a contract. Subcontractors cannot submit invoices to Mason under any resulting contract.

- IX. **PERIOD OF PERFORMANCE:** Two (2) years from Effective Date of contract with eight (8) successive one-year renewal options (or as negotiated).

- X. **BACKGROUND:** George Mason University's short history is one of an enterprising and innovative pioneer, creating a major teaching and research university from a small, one-room schoolhouse in just 50 years. George Mason University is recognized as an innovative, entrepreneurial institution with global distinction in a range of academic fields. With strong undergraduate and graduate degree programs in engineering and information technology, dance, organizational psychology and health care, Mason students are routinely recognized with national and international scholarships. Enrollment is more than 38,000, with students studying in 198 degree programs at the undergraduate, masters, doctoral, and professional levels. Additionally, Mason has more than 200,000 living alumni with 60% residing in the Washington Metropolitan Area.

Mason has campuses in Fairfax, Arlington, and Prince William counties. In addition to these three campuses, George Mason University operates a site in Woodbridge, VA and has partnered with the Smithsonian Institution to create the Smithsonian-University School of Conservation in Front Royal, Virginia. Approximately 6,000 employees are distributed at these locations. Mason also offers programs online and at the Center for Innovative Technology in Herndon. Each location has a distinctive academic focus that plays a critical role in the economy of its region.

- XI. **STATEMENT OF NEEDS:** George Mason University is seeking a solution to support Mason's Office of Enrollment Management, Undergraduate and Graduate Admissions, Graduate Division, Undergraduate



Education, and University Life with the goal of creating an Optimal Customer Relationship Management (CRM) system that can be integrated into existing systems and aligned with the University's strategic goals.

See Appendix A for a detailed Statement of Work, Assessment, and Requirements.

XII. COST OF SERVICES: Provide detailed pricing for systems/software, consulting/services, training, travel, etc., being proposed and include the following.

- Please provide and break out separately all one-time and recurring costs associated with your offered solution/system. Offerors should provide costs for implementation, integration, support/services, training, development, and maintenance costs. Your pricing/cost of services quoted should be inclusive of all associated costs for this system/solution/service.
- If there are any discounts available for volume, multi-year commitments, enterprise wide licensing, etc. please make sure to clearly state those in your proposal.
- Describe how you propose to handle any travel or out-of-pocket expenses related to provisions of these services. Specifically address expenses for resources based in locations near Mason. As part of your offer (if travel reimbursement or travel fees/costs/expense are to be billed) your organization must agree to accept to be reimbursed in accordance with Mason's per diem policies/requirements (GSA per diem rates). Please clearly outline any travel requirements/costs/expenses in your offer.

XIII. PROPOSAL PREPARATION AND SUBMISSION REQUIREMENTS:

A. GENERAL REQUIREMENTS:

1. **RFP Response:** In order to be considered, Offerors must submit a complete response to Mason's Purchasing Office prior to the due date and time stated in this RFP. Offerors are required to submit one (1) signed copy of the entire proposal including all attachments and proprietary information. If the proposal contains proprietary information, then submit two (2) proposals must be submitted; one (1) with proprietary information included and one (1) with proprietary information removed (see also Item 2d below for further details). The Offeror shall make no other distribution of the proposals.

At the conclusion of the RFP process proposals with proprietary information removed (redacted versions) shall be provided to requestors in accordance with Virginia's Freedom of Information Act. Offerors will not be notified of the release of this information.

ELECTRONIC PROPOSAL SUBMISSION: **Mason will only be accepting electronic proposal submissions for all current Request For Proposals and Invitation For Bids.**

The following shall apply:

- a. You must submit your proposal, and it must be received prior to the submission deadline, at both the primary and secondary procurement officer's email address as specified on the cover page.
- b. The subject line of your email submission should read, "**RFP GMU-1859-23**" If you are sending multiple emails, please state so in the subject line with the wording, "This is email # _ of _ total".

- c. The Offeror must ensure the proposals are delivered to the procurement officers' email inboxes, sufficiently in advance of the proposal deadline. **Plan Ahead: It is the Offeror's responsibility to ensure that electronic proposal submissions have sufficient time to make its way through any filters or email traffic. Mason recommends you submit your proposal the day prior to the due date.**
- d. If your proposal contains proprietary information you must submit two proposals; one full proposal and one with proprietary information redacted (See 2d below).
- e. While you may send your proposal in multiple emails, each email itself may only have one PDF attachment containing all supplemental information and attachments.
- f. Each email may not be larger than 20MB.
- g. All solicitation schedules are subject to change.
- h. Go to Mason's Purchasing website for all updates and schedule changes. <https://fiscal.gmu.edu/purchasing/do-business-with-mason/view-current-solicitation-opportunities/>

2. Proposal Presentation:

- a. Proposals shall be signed by an authorized representative of the Offeror. All information requested must be submitted. Failure to submit all information requested may result in your proposal being scored low.
- b. Proposals should be prepared simply and economically, providing a straightforward, concise description of capabilities to satisfy the requirement of the RFP. Emphasis should be on completeness and clarity of content.
- c. Proposals should be organized in the order in which the requirements are presented in the RFP. All pages of the proposal should be numbered. Each paragraph in the proposal should reference the paragraph number corresponding section of the RFP. It is also helpful to cite the paragraph number, sub letter and repeat the text of the requirement as it appears in the RFP. The proposal should contain a table of contents which cross references the RFP requirements. Information which the Offeror desires to present that does not fall within any of the requirement of the RFP should be inserted at the appropriate place or be attached at the end of the proposal and designated as additional material.

A WORD version of this RFP will be provided upon request.

- d. Except as provided, once an award is announced, all proposals submitted in response to this RFP will be open to inspection by any citizen, or interested person, firm or corporation, in accordance with the Virginia Freedom of Information Act. Trade secrets or proprietary information submitted by a firm prior to or as part of its proposal will not be subject to public disclosure under the Virginia Freedom of Information Act only under the following circumstances: (1) the appropriate information is clearly identified by some distinct method such as highlighting or underlining; (2) only the specific words, figures, or paragraphs that constitute trade secrets or proprietary information are identified; and (3) a summary page is supplied immediately following the proposal title page that

includes (a) the information to be protected, (b) the section(s)/page number(s) where this information is found in the proposal, and (c) a statement why protection is necessary for each section listed. The firm must also provide a separate attachment of the proposal with the trade secrets and/or proprietary information redacted. *If all of these requirements are not met, then the firm's entire proposal will be available for public inspection.*

IMPORTANT: A firm may not request that its entire proposal be treated as a trade secret or proprietary information, nor may a firm request that its pricing/fees be treated as a trade secret or proprietary information, or otherwise be deemed confidential. If after given a reasonable time, the Offeror refuses to withdraw the aforementioned designation, the proposal will be rejected.

3. Oral Presentation: Offerors who submit a proposal in response to this RFP **may be** required to give an oral presentation/demonstration of their proposal/product to Mason. This will provide an opportunity for the Offeror to clarify or elaborate on their proposal. Performance during oral presentations may affect the final award decision. If required, oral presentations will be scheduled at the appropriate time.

Mason will expect that the person or persons who will be working on the project to make the presentation so experience of the Offeror's staff can be evaluated prior to making selection. Oral presentations are an option of Mason and may or may not be conducted; therefore, it is imperative all proposals should be complete.

- B. SPECIFIC REQUIREMENTS: Proposals should be as thorough and detailed as possible to allow Mason to properly evaluate the Offeror's capabilities and approach toward providing the required services. Offerors should submit the following items as a complete proposal.

1. Procedural information:
 - a. Return signed cover page and all addenda, if any, signed and completed as required.
 - b. Return Attachment A - Small Business Subcontracting Plan.
 - c. State your payment preference in your proposal response. (See section XVII.)
2. Executive Summary: Offerors must submit an executive summary at the beginning of the proposal response not to exceed 2 pages.
3. Qualifications and Experience: Describe your experience, qualifications and success in providing the services described in the Statement of Needs to include the following:
 - a. Background and brief history of your company.
 - b. Names, qualifications and experience of personnel to be assigned to work with Mason.
 - c. No fewer than three (3) references that demonstrate the Offeror's qualifications, preferably from other comparable higher education institutions your company is/has provided services with and that are similar in size and scope to that which has been described herein. Include a contact name, contact title, phone number, and email for each reference and indicate the length of service.
4. Specific Plan (Methodology): Explain your specific plans for providing the proposed services outlined in the Statement of Needs including:
 - a. Your approach to providing the services described herein.

- b. What, when and how services will be performed.
- XIV. Proposed Pricing:** Provide detailed pricing for any systems/software, consulting/services, training, travel, etc., being proposed and include the following:

- Please provide and break out separately all one-time and recurring costs associated with your offered solution/system. Offerors should provide costs for implementation, integration, support/services, training, development, and maintenance costs. Your pricing/cost of services quoted should be inclusive of all associated costs for this system/solution/service.
- If there are any discounts available for volume, multi-year commitments, enterprise wide licensing, etc. please make sure to clearly state those in your proposal.
- Describe how you propose to handle any travel or out-of-pocket expenses related to provisions of these services. Specifically address expenses for resources based in locations near Mason. As part of your offer (if travel reimbursement or travel fees/costs/expense are to be billed) your organization must agree to accept to be reimbursed in accordance with Mason's per diem policies/requirements (GSA per diem rates). Please clearly outline any travel requirements/costs/expenses in your offer.

5. 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.
- d. In the past ten (10) years has your firm's name changed? If so please provide a reason for the change.

XV. INITIAL EVALUATION CRITERIA AND SUBSEQUENT AWARD:

- A. INITIAL EVALUATION CRITERIA: Proposals shall be initially evaluated and ranked using the following criteria:

	<u>Description of Criteria</u>	<u>Maximum Point Value</u>
1.	Quality of proposed products/services offered and suitability for the intended purpose	25
2.	Qualifications and experiences of offeror in providing the goods/services, including references	20
3.	Specific plans or methodology to be used to provide the services	25
4.	Price Offered	20
5.	Offeror is certified as a small, minority, or women-owned business (SWaM) with Virginia SBSD at the proposal due date & time.	10

Total Points Available:

100

- B. **AWARD:** **Following the initial scoring by the evaluation committee,** at least two or more top ranked offerors may be contacted for oral presentations/demonstrations or advanced directly to the negotiations stage. ***If oral presentations are conducted Mason will then determine, in its sole discretion, which offerors will advance to the negotiations phase.*** Negotiations shall then be conducted with each of the offerors so selected. Price shall be considered, but need not be the sole determining factor. After negotiations have been conducted with each offeror so selected, Mason shall select the offeror which, in its sole discretion has made the best proposal, and shall award the contract to that offeror. When the terms and conditions of multiple awards are so provided in the Request for Proposal, awards may be made to more than one offeror. Should Mason determine in writing and in its sole discretion that only one offeror has made the best proposal, a contract may be negotiated and awarded to that offeror. Mason is not required to furnish a statement of the reasons why a particular proposal was not deemed to be the most advantageous (*Governing Rules §49.D.*).

- XVI. **CONTRACT ADMINISTRATION:** Upon award of the contract, Mason shall designate, in writing, the name of the Contract Administrator who shall work with the contractor in formulating mutually acceptable plans and standards for the operations of this service. The Contract Administrator shall use all powers under the contract to enforce its faithful performance. The Contract Administrator shall determine the amount, quality and acceptability of work and shall decide all other questions in connection with the work. All direction and order from Mason shall be transmitted through the Contract Administrator, or their designee(s) however, the Contract Administrator shall have no authority to approve changes which shall alter the concept or scope of the work or change the basis for compensation to the contractor.

XVII. **PAYMENT TERMS / METHOD OF PAYMENT:**

PLEASE NOTE: THE VENDOR MUST REFERENCE THE PURCHASE ORDER NUMBER ON ALL INVOICES SUBMITTED FOR PAYMENT.

Option #1- Payment to be mailed in 10 days-Mason will make payment to the vendor under 2%/10 Net 30 payment terms. Invoices should be submitted via email to the designated Accounts Payable email address which is acctpay@gmu.edu.

The 10-day payment period begins the first business day after receipt of proper invoice or receipt of goods, whichever occurs last. A paper check will be mailed on or before the 10th day.

Option #2- To be paid in 20 days. The vendor may opt to be paid through our Virtual Payables credit card program. The vendor shall submit an invoice and will be paid via credit card on the 20th day from receipt of a valid invoice. The vendor will incur standard credit card interchange fees through their processor. All invoices should be sent to:

George Mason University
Accounts Payable Department
4400 University Drive, Mailstop 3C1
Fairfax, VA 22030
Voice: 703.993.2580 | Fax: 703.993.2589
e-mail: AcctPay@gmu.edu

Option#3- Net 30 Payment Terms. Vendor will enroll in Paymode-X where all payments will be made electronically to the vendor's bank account. For additional information or to sign up for electronic payments, go to <http://www.paymode.com/gmu>. There is no charge to the vendor for enrolling in this service.

Note: Payment will be made, upon completion of each deliverable and after receipt of invoice. Please state your payment preference in your proposal response.

XVIII. SOLICITATION TERMS AND CONDITIONS:

- A. ANNOUNCEMENT OF AWARD: Upon the award or the announcement of the decision to award a contract over \$200,000, as a result of this solicitation, Mason will publicly post such notice on the DGS/DPS eVA web site (<https://eva.virginia.gov/>) for a minimum of 10 days.
- B. BEST AND FINAL OFFER (BAFO): At the conclusion of negotiations, the offeror(s) may be asked to submit in writing, a best and final offer (BAFO). After the BAFO is submitted, no further negotiations shall be conducted with the offeror(s).
- C. CONFLICT OF INTEREST: By submitting a proposal the contractor warrants that he/she has fully complied with the Virginia Conflict of Interest Act; furthermore certifying that he/she is not currently an employee of the Commonwealth of Virginia.
- D. DEBARMENT STATUS: By submitting a proposal, offerors certify that they are not currently debarred by the Commonwealth of Virginia from submitting bids or proposals on contracts for the type of goods and/or services covered by this solicitation, nor are they an agent of any person or entity that is currently so debarred.
- E. ETHICS IN PUBLIC CONTRACTING: By submitting a proposal, offerors certify that their proposal is made without collusion or fraud and that they have not offered or received any kickbacks or inducements from any other offeror, supplier, manufacturer or subcontractor in connection with their proposal, and that they have not conferred on any public employee having official responsibility for this procurement transaction any payment, loan, subscription, advance, deposit of money, services or anything of more than nominal value, present or promised, unless consideration of substantially equal or greater value was exchanged.
- F. LATE PROPOSALS: To be considered for selection, proposals must be received by Mason by the designated date and hour. The official time used in the receipt of proposals is the "received" time on the Primary or Secondary Procurement Officers email inbox, whichever is earlier. Proposals received after the due date and time has expired will not be accepted nor considered. Mason is not responsible for delays in the delivery of email. It is the responsibility of the offeror to ensure that their proposal reaches the Primary or Secondary Procurement Officer's email inbox by the designated date and hour.
- G. MANDATORY USE OF MASON FORM AND TERMS AND CONDITIONS: Failure to submit a proposal on the official Mason form provided for that purpose may be a cause for rejection of the proposal. Modification of or additions to the General Terms and Conditions of this solicitation may be cause for rejection of the proposal; however, Mason reserves the right to decide, on a case-by-case basis, in its sole discretion, whether to reject such a proposal.
- H. OBLIGATION OF OFFEROR: It is the responsibility of each offeror to inquire about and clarify any requirements of this solicitation that are not understood. Mason will not be bound by oral explanations as to the meaning of specifications or language contained in this solicitation. Therefore, all inquiries must be in writing and submitted as instructed on page 1 of this solicitation. By submitting a proposal, the offeror covenants and agrees that they have satisfied themselves, from their own investigation of the conditions to be met, that they fully understand their obligation and that they will not make any claim for, or have right to cancellation or relief from the resulting contact because of any misunderstanding or lack of information.
- I. QUALIFICATIONS OF OFFERORS: Mason may make such reasonable investigations as deemed proper and necessary to determine the ability of the offeror to perform the services/furnish the goods

and the offeror shall furnish to Mason all such information and data for this purpose as may be requested. Mason reserves the right to inspect the offeror's physical facilities prior to award to satisfy questions regarding the offeror's capabilities. Mason further reserves the right to reject any proposal if the evidence submitted by, or investigations of, such offeror fails to satisfy Mason that such offeror is properly qualified to carry out the obligations of the resulting contract and to provide the services and/or furnish the goods contemplated therein.

- J. RFP DEBRIEFING: In accordance with §49 of the *Governing Rules* Mason is not required to furnish a statement of the reasons why a particular proposal was not deemed to be the most advantageous. However, upon request we will provide a scoring/ranking summary and the award justification memo from the evaluation committee. Formal debriefings are generally not offered.
- K. TESTING AND INSPECTION: Mason reserves the right to conduct any test/inspection it may deem advisable to assure goods and services conform to the specifications.

XIX. RFP SCHEDULE (Subject to Change):

- Issue in eVA: 3/13/23
- Vendors submit questions by: 3/21/23 by 4:00 PM ET
- Post Question Responses: 3/31/23 by 5:00 PM ET
- Proposals Due: 4/14/23 @ 2:00 PM ET
- Proposals to Committee: 4/17/23
- Review and Score Proposals: 4/17/23 – 4/28/23
- Scores to Purchasing: 5/1/23
- Oral presentations (if necessary): 5/1/23 – 5/15/23
- Negotiations/BAFO: Start week of 5/22/23
- ASRB TBD
- Award: 6/12/23
- Contract Start Date: 6/30/23

XX. ARCHITECTURAL STANDARDS REVIEW BOARD (ASRB) REQUIREMENTS:

After conclusion of negotiations/Best and Final Offer (BAFO) but prior to award of a contract (and/or release of funding to procure your solution) your solution/system will be submitted to Mason's Architectural Standards Review Board (ASRB). The ASRB will review your system for security, accessibility (508 compliance), ease/ability to integrate with existing systems, etc. The Offeror must agree to submit their product/system/software to ASRB and submit any requested information to assist in the review process. ASRB approval is required prior to contract award or funding being released to procure the system/product.

The contractor should be prepared to submit any of the following items including but not limited to;

- Data Dictionary identifying the data elements available for use in the product,
- Data integration documentation,
- Architecture diagrams,
- Security documentation, including but not limited to the vendor's SOC 2 Type (preferred) and/or your third-party hosting vendor's SOC 2 Type II (or other equivalent security audit). If you cannot provide this documentation for your organization and/or your third-party hosting vendor, please clearly state as such in your offer. If you have a SOC 2 Type II for your organization (or other equivalent security audit) and/or your third-party hosting vendor but require an NDA in order to release it please state as such in your offer and clearly define which organization (you or your third-party vendor) you can provide a SOC 2 Type II (or other equivalent security audit) for and a copy of your NDA. If you are providing an equivalent security audit (not a SOC 2 Type II) please clearly define what type of audit you are submitting.



- VPAT, and a useable software demo or “sandbox” for accessibility testing,
- And any single sign-on documentation.
- Additional documentation or items may be requested as needed during the review process.
- The contractor may be asked to answer ASRB questions verbally or in writing

It is imperative that the Contractor comply with these requests in a timely fashion as any delay will result in a delay of contract award. Failure to provide documentation or extended delay may result in negotiations concluding, your offer being rejected or an award being rescinded.



ATTACHMENT A
SMALL BUSINESS SUBCONTRACTING PLAN
TO BE COMPLETED BY OFFEROR

Offerors must advise any portion of this contract that will be subcontracted. 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: _____

Preparer Name: _____ **Date:** _____

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

Subcontract #2



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

Subcontract #3

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

Subcontract #4

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

Subcontract #5

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



Purchasing Department
4400 University Drive, Mailstop 3C5
Fairfax, VA 22030

ATTACHMENT B – SAMPLE CONTRACT GMU-1859-23

Note: Other documents may be incorporated into this document, either by way of attachment or by reference, but in all cases this contract document shall take precedence over all other documents and will govern the terms and conditions of the contract.

This Contract entered on this ____ day of _____, 2022 (Effective Date) by _____ hereinafter called “Contractor” (located at _____) and George Mason University hereinafter called “Mason,” “University”.

- I. **WITNESSETH** that the Contractor and Mason, in consideration of the mutual covenants, promises and agreement herein contained, agree as follows:
- II. **SCOPE OF CONTRACT:** The Contractor shall provide _____ for the _____ of George Mason University as set forth in the Contract documents.
- III. **PERIOD OF CONTRACT:** One year from the Effective Date with four (4) successive one-year renewal options. (or as negotiated)
- IV. **PRICE SCHEDULE:** As negotiated
- V. **CONTRACT ADMINISTRATION:** _____ shall serve as Contract Administrator for this Contract and shall use all powers under the Contract to enforce its faithful performance. The Contract Administrator shall determine the amount, quality and acceptability of work and shall decide all other questions in connection with the work. All direction and order from Mason shall be transmitted through the Contract Administrator, however, the Contract Administrator shall have no authority to approve changes which shall alter the concept or scope or change the basis for compensation.
- VI. **METHOD OF PAYMENT:** As negotiated
- VII. **THE CONTRACT DOCUMENTS SHALL CONSIST OF (In order of precedence):**
 - A. This signed form;
 - B. Data Security Addendum (attached);
 - C. Negotiation Responses dated XXXXX (incorporated herein by reference);
 - D. RFP No. GMU-XXXX-XX, in its entirety (incorporated herein by reference);
 - E. Contractor’s proposal dated XXXXXX (incorporated herein by reference).
- VIII. **GOVERNING RULES:** This Contract is governed by the provisions of the Restructured Higher Education Financial and Administrative Operations Act, Chapter 10 (§ [23.1-1000](#) et seq.) of Title 23.1 of the Code of Virginia, and the “*Governing Rules*” and the *Purchasing Manual for Institutions of Higher Education and their Vendors*. Documents may be viewed at: <https://vascupp.org>.
- IX. **CONTRACT PARTICIPATION:** *As negotiated*. It is the intent of this Contract to allow for cooperative procurement. Accordingly, any public body, public or private health or educational institutions, or affiliated

corporations may access this Contract if authorized by the Contractor.

Participation in this Contract is strictly voluntary. If authorized by the Contractor, the contract will be extended to the entities indicated above to purchase goods and services in accordance with contract terms. As a separate contractual relationship, the participating entity will place its own orders directly with the Contractor and shall fully and independently administer its use of the contract to include contractual disputes, invoicing and payments without direct administration from the University. No modification of this Contract or execution of a separate agreement is required to participate; however, the participating entity and the Contractor may modify the terms and conditions of the contract to accommodate specific governing laws, regulations, policies, and business goals required by the participating entity. Any such modification will apply solely between the participating entity and the Contractor.

The University may request the Contractor provide semi-annual usage reports for all entities accessing the Contract. The University shall not be held liable for any costs or damages incurred by any other participating entity as a result of any authorization by the Contractor to extend the Contract. It is understood and agreed that the University is not responsible for the acts or omissions of any entity and will not be considered in default of the contract no matter the circumstances.

Use of this Contract does not preclude any participating entity from using other contracts or competitive processes as needed.

X. STANDARD TERMS AND CONDITIONS:

- A. APPLICABLE LAW AND CHOICE OF FORUM: This Contract shall be construed, governed, and interpreted pursuant to the laws of the Commonwealth of Virginia. All disputes arising under this Contract shall be brought before an appropriate court in the Commonwealth of Virginia.
- B. ANTI-DISCRIMINATION: By entering into this Contract, Contractor certifies to the Commonwealth that they will conform to the provisions of the Federal Civil Rights Act of 1964, as amended, as well as the Virginia Fair Employment Contracting Act of 1975, as amended, where applicable, the Virginians With Disabilities Act, the Americans With Disabilities Act and §§ 9&10 of the *Governing Rules*. If Contractor is a faith-based organization, the organization shall not discriminate against any recipient of goods, services, or disbursements made pursuant to the Contract on the basis of the recipient's religion, religious belief, refusal to participate in a religious practice, or on the basis of race, age, color, gender or national origin and shall be subject to the same rules as other organizations that contract with public bodies to account for the use of the funds provided; however, if the faith-based organization segregates public funds into separate accounts, only the accounts and programs funded with public funds shall be subject to audit by the public body. (*Governing Rules*, § 36).

In every contract over \$10,000 the provisions in 1. and 2. below apply:

- 1. During the performance of this Contract, the Contractor agrees as follows:
 - a. The Contractor will not discriminate against any employee or applicant for employment because of race, religion, color, sex, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment, except where there is a bona fide occupational qualification reasonably necessary to the normal operation of the Contractor. The Contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this nondiscrimination clause.
 - b. The Contractor, in all solicitations or advertisements for employees placed by or on behalf of the Contractor, will state that such Contractor is an equal opportunity



employer.

- c. Notices, advertisements and solicitations placed in accordance with federal law, rule or regulation shall be deemed sufficient for the purpose of meeting these requirements.
2. The Contractor will include the provisions of 1. above in every subcontract or purchase order over \$10,000, so that the provisions will be binding upon each subcontractor or Contractor.
- C. ANTITRUST: By entering into this Contract, the Contractor conveys, sells, assigns, and transfers to the Commonwealth of Virginia all rights, title and interest in and to all causes of action it may now have or hereafter acquire under the antitrust laws of the United States and the Commonwealth of Virginia, relating to the particular goods or services purchased or acquired by the Commonwealth of Virginia under this Contract.
- D. ASSIGNMENT: Neither party will assign or otherwise transfer its rights or obligations under this Contract without both parties' prior written consent. Any attempted assignment, transfer, or delegation without such consent is void.
- E. AUDIT: The Contractor shall retain all books, records, and other documents relative to this Contract for five (5) years after final payment, or until audited by the Commonwealth of Virginia, whichever is sooner. Mason, its authorized agents, and/or state auditors shall have full access to and the right to examine any of said materials during said period.
- F. AVAILABILITY OF FUNDS: It is understood and agreed between the parties herein that Mason shall be bound hereunder only to the extent of the funds available or which may hereafter become available for the purpose of this Contract.
- G. AUTHORIZED SIGNATURES: The signatory for each Party certifies that he or she is an authorized agent to sign on behalf such Party.
- H. BACKGROUND CHECKS: Contractor's employees (including subcontractors) performing services on any Mason campus must have successfully completed a criminal background check prior to the start of their work assignment/service. As stated in [University Policy Number 2221 – Background Investigations](#), the criminal background investigation will normally include a review of the individual's records to include Social Security Number Search, Credit Report (if related to potential job duties), Criminal Records Search (any misdemeanor convictions and/or felony convictions are reported) in all states in which the employee has lived or worked over the past seven years, and the National Sex Offender Registry. In addition, the Global Watch list (maintained by the Office of Foreign Assets Control of The US Department of Treasury) should be reviewed. Signature on this Contract confirms your compliance with this requirement.
- I. CANCELLATION OF CONTRACT: Mason reserves the right to cancel this Contract, in part or in whole, without penalty, for any reason, upon 60 days written notice to the Contractor. Upon written notice of cancellation from Mason, Mason shall be fully released from any further obligation under the Contract and Contractor agrees to directly refund all payments, for services not already performed, to Mason, including any pre-paid deposits, within 14 days. In the event the initial Contract period is for more than 12 months, the resulting Contract may be terminated by either party, without penalty, after the initial 12 months of the Contract period upon 60 days written notice to the other party. Any contract cancellation notice shall not relieve the Contractor of the obligation to deliver and/or perform on all outstanding orders issued prior to the effective date of cancellation.
- J. CHANGES TO THE CONTRACT: Changes can be made to this Contract in any of the following

ways:

1. The parties may agree in writing to modify the scope of this Contract.
2. Mason may order changes within the general scope of Contract at any time by written notice to Contractor. Changes within the scope of this Contract include, but are not limited to, things such as services to be performed, the method of packing or shipment, and the place of delivery or installation. Contractor shall comply with the notice upon receipt. Contractor shall be compensated for any additional costs incurred as the result of such order and shall give Mason a credit for any savings. Said compensation shall be determined by one of the following methods:
 - a. By mutual agreement between the parties in writing; or
 - b. By agreeing upon a unit price or using a unit price set forth in the contract, if the work to be done can be expressed in units, and the contractor accounts for the number of units of work performed, subject to the Mason's right to audit Contractor's records and/or to determine the correct number of units independently; or
 - c. By ordering Contractor to proceed with the work and keep a record of all costs incurred and savings realized. A markup for overhead and profit may be allowed if provided by the Contract. The same markup shall be used for determining a decrease in price as the result of savings realized. Contractor shall present Mason with all vouchers and records of expenses incurred and savings realized. Mason shall have the right to audit the records of Contractor as it deems necessary to determine costs or savings. Any claim for an adjustment in price under this provision must be asserted by written notice to Mason within thirty (30) days from the date of receipt of the written order from Mason. If the Parties fail to agree on an amount of adjustment, the question of an increase or decrease in the contract price or time for performance shall be resolved in accordance with the procedures for resolving disputes provided by the Disputes Clause of this Contract or, if there is none, in accordance with the disputes provisions of the Commonwealth of Virginia Purchasing Manual for Institutions of Higher Education and Their Contractors. Neither the existence of a claim nor a dispute resolution process, litigation or any other provision of this Contract shall excuse the Contractor from promptly complying with the changes ordered by Mason or with the performance of the contract generally.

K. CLAIMS: Contractual claims, whether for money or other relief, shall be submitted in writing no later than 60 days after final payment. However, written notice of the Contractor's intention to file a claim shall be given at the time of the occurrence or beginning of the work upon which the claim is based. Nothing herein shall preclude a contract from requiring submission of an invoice for final payment within a certain time after completion and acceptance of the work or acceptance of the goods. Pendency of claims shall not delay payment of amounts agreed due in the final payment.

1. The firm must submit written claim to:
Chief Procurement Officer
George Mason University
4400 University Drive, MSN 3C5
Fairfax, VA 22030
2. The firm must submit any unresolved claim in writing no later than 60 days after final payment to the Chief Procurement Officer.



3. Upon receiving the written claim, the Chief Procurement Officer will review the written materials relating to the claim and will mail his or her decision to the firm within 60 days after receipt of the claim.
 4. The firm may appeal the Chief Procurement Officer's decision in accordance with § 55 of the *Governing Rules*.
- L. COLLECTION AND ATTORNEY'S FEES: The Contractor shall pay to Mason any reasonable attorney's fees or collection fees, at the maximum allowable rate permitted under Virginia law, incurred in enforcing this Contract or pursuing and collecting past-due amounts under this Contract.
- M. COMPLIANCE: All goods and services provided to Mason shall be done so in accordance with any and all applicable local, state, federal, and international laws, regulations and/or requirements and any industry standards, including but not limited to: the Family Educational Rights and Privacy Act (FERPA), Health Insurance Portability and Accountability Act (HIPAA) and Health Information Technology for Economic and Clinical Health Act (HITECH), Government Data Collection and Dissemination Practices Act, Gramm-Leach-Bliley Financial Modernization Act (GLB), Payment Card Industry Data Security Standards (PCI-DSS), Americans with Disabilities Act (ADA), and Federal Export Administration Regulations. Any Contractor personnel visiting Mason facilities will comply with all applicable Mason policies regarding access to, use of, and conduct within such facilities. Mason's policies can be found at <https://universitypolicy.gmu.edu/all-policies/> and any facility specific policies can be obtained from the facility manager.
- N. CONFIDENTIALITY OF PERSONALLY IDENTIFIABLE INFORMATION: The Contractor shall ensure that personally identifiable information ("PII") which is defined as any information that by itself or when combined with other information can be connected to a specific person and may include but is not limited to personal identifiers such as name, address, phone, date of birth, Social Security number, student or personal identification numbers, driver's license numbers, state or federal identification numbers, biometric information, religious or political affiliation, non-directory information, and any other information protected by state or federal privacy laws, will be collected and held confidential and in accordance with this Contract, during and following the term of this Contract, and will not be divulged without the individual's and Mason's written consent and only in accordance with federal law or the Code of Virginia.
- O. CONFLICT OF INTEREST: Contractor represents to Mason that its entering into this Contract with Mason and its performance through its agents, officers and employees does not and will not involve, contribute to nor create a conflict of interest prohibited by Virginia State and Local Government Conflict of Interests Act (Va. Code 2.2-3100 *et seq*), the Virginia Ethics in Public Contracting Act (§57 of the *Governing Rules*), the Virginia Governmental Frauds Act (Va. Code 18.2 – 498.1 *et seq*) or any other applicable law or regulation.
- P. CONTINUITY OF SERVICES:
1. The Contractor recognizes that the services under this Contract are vital to Mason and must be continued without interruption and that, upon Contract expiration, a successor, either Mason or another contractor, may continue them. The Contractor agrees:
 - a. To exercise its best efforts and cooperation to affect an orderly and efficient transition to a successor;
 - b. To make all Mason owned facilities, equipment, and data available to any successor at an appropriate time prior to the expiration of the Contract to facilitate transition to successor; and



- c. That the University Procurement Officer shall have final authority to resolve disputes related to the transition of the Contract from the Contractor to its successor.
 2. The Contractor shall, upon written notice from the Procurement Officer, furnish phase-in/phase-out services for up to ninety (90) days after this Contract expires and shall negotiate in good faith a plan with the successor to execute the phase-in/phase-out services. This plan shall be subject to the Procurement Officer's approval.
 3. The Contractor shall be reimbursed for all reasonable, pre-approved phase-in/phase-out costs (i.e., costs incurred within the agreed period after Contract expiration that result from phase-in, phase-out operations). All phase-in/phase-out work fees must be approved by the Procurement Officer in writing prior to commencement of said work.
- Q. DEBARMENT STATUS: As of the Effective Date, the Contractor certifies that it is not currently debarred by the Commonwealth of Virginia from submitting bids or proposals on contracts for the type of services covered by this Contract, nor is the Contractor an agent of any person or entity that is currently so debarred.
- R. DEFAULT: In the case of failure to deliver goods or services in accordance with this Contract, Mason, after due oral or written notice, may procure them from other sources and hold Contractor responsible for any resulting additional purchase and administrative costs. This remedy shall be in addition to any other remedies which Mason may have.
- S. DRUG-FREE WORKPLACE: Contractor has, and shall have in place during the performance of this Contract, a drug-free workplace policy (DFWP), which it provides in writing to all its employees, vendors, and subcontractors, and which specifically prohibits the following on company premises, during work-related activities, or while conducting company business: the sale, purchase, manufacture, dispensation, distribution possession, or use of any illegal drug under federal law (including marijuana). For purposes of this section, "drug-free workplace" covers all sites at which work is done by Contractor in connection with this Contract.
- T. ENTIRE CONTRACT: This Contract constitutes the entire understanding of the Parties with respect to the subject matter herein and supersedes all prior oral or written contracts with respect to the subject matter herein. This Contract can be modified or amended only by a writing signed by all of the Parties.
- U. EXPORT CONTROL:
1. **Munitions Items**: If the Contractor is providing any items, data or services under this order that are controlled by the Department of State, Directorate of Defense Trade Controls, International Traffic in Arms Regulations ("ITAR"), or any items, technology or software controlled under the "600 series" classifications of the Bureau of Industry and Security's Commerce Control List ("CCL") (collectively, "Munitions Items"), prior to delivery, Contractor must:
 - A. notify Mason (by sending an email to export@gmu.edu), and
 - B. receive written authorization for shipment from Mason's Director of Export Controls.

The notification provided by the Contractor must include the name of the Mason point of contact, identify and describe each ITAR or CCL-controlled commodity, provide the associated U.S. Munitions List (USML) category number(s) or Export Control

Classification Number, and indicate whether or not the determination was reached as a result of a commodity jurisdiction determination, or self-classification process. The Contractor promises that if it fails to obtain the required written pre-authorization approval for shipment to Mason of any Munitions Item, it will reimburse Mason for any fines, legal costs and other fees imposed for any violation of export controls regarding the Munition Item that are reasonably related to the Contractor's failure to provide notice or obtain Mason's written pre-authorization.

2. **Dual-Use Items:** If the Contractor is providing any dual-use items, technology or software under this order that are listed on the CCL in a series other than a "600 series", Contractor must (i) include the Export Control Classification Number (ECCN) on the packing or other transmittal documentation traveling with the item(s) and, (ii) send a description of the item, its ECCN, and the name of the Mason point of contact to: export@gmu.edu.
- V. **FORCE MAJEURE:** Mason shall be excused from any and all liability for failure or delay in performance of any obligation under this Contract resulting from any cause not within the reasonable control of Mason, which includes but is not limited to acts of God, fire, flood, explosion, earthquake, or other natural forces, war, civil unrest, accident, any strike or labor disturbance, travel restrictions, acts of government, disease, pandemic, or contagion, whether such cause is similar or dissimilar to any of the foregoing. Upon written notification from Mason that such cause has occurred, Contractor agrees to directly refund all payments to Mason, for services not yet performed, including any pre-paid deposits within 14 days.
- W. **FUTURE GOODS AND SERVICES:** Mason reserves the right to have Contractor provide additional goods and/or services that may be required by Mason during the term of this Contract. Any such goods and/or services will be provided by the Contractor under the same pricing, terms and conditions of this Contract. Such additional goods and/or services may include other products, components, accessories, subsystems or related services that are newly introduced during the term of the Contract. Such newly introduced additional goods and/or services will be provided to Mason at Favored Customer pricing, terms and conditions.
- X. **IMMIGRATION REFORM AND CONTROL ACT OF 1986:** By entering into this Contract Contractor certifies that they do not and will not during the performance of this Contract employ illegal alien workers or otherwise violate the provisions of the federal Immigration Reform and Control Act of 1986.
- Y. **INDEMNIFICATION:** Contractor agrees to indemnify, defend and hold harmless Mason, the Commonwealth of Virginia, its officers, agents, and employees from any claims, damages and actions of any kind or nature, whether at law or in equity, arising from or caused by the use of any materials, goods, or equipment of any kind or nature furnished by the Contractor/any services of any kind or nature furnished by the Contractor, provided that such liability is not attributable to the sole negligence of Mason or to the failure of Mason to use the materials, goods, or equipment in the manner already and permanently described by the Contractor on the materials, goods or equipment delivered.
- Z. **INDEPENDENT CONTRACTOR:** The Contractor is not an employee of Mason, but is engaged as an independent contractor. The Contractor shall indemnify and hold harmless the Commonwealth of Virginia, Mason, and its employees and agents, with respect to all withholding, Social Security, unemployment compensation and all other taxes or amounts of any kind relating to the Contractor's performance of this Contract. Nothing in this Contract shall be construed as authority for the Contractor to make commitments which will bind Mason or to otherwise act on behalf of Mason, except as Mason may expressly authorize in writing.
- AA. **INFORMATION TECHNOLOGY ACCESS ACT:** Computer and network security is of



paramount concern at Mason. Mason wants to ensure that computer/network hardware and software does not compromise the security of its IT environment. Contractor agrees to use commercially reasonable measures in connection with any offering your company makes to avoid any known threat to the security of the IT environment at Mason.

All e-learning and information technology developed, purchased, upgraded or renewed by or for the use of Mason shall comply with all applicable University policies, Federal and State laws and regulations including but not limited to Section 508 of the Rehabilitation Act (29 U.S.C. 794d), the Information Technology Access Act, §§2.2-3500 through 2.2-3504 of the Code of Virginia, as amended, and all other regulations promulgated under Title II of The Americans with Disabilities Act which are applicable to all benefits, services, programs, and activities provided by or on behalf of the University. The Contractor shall also comply with the Web Content Accessibility Guidelines (WCAG) 2.0. For more information please visit <http://ati.gmu.edu>, under Policies and Procedures.

BB. INSURANCE: The Contractor shall maintain all insurance necessary with respect to the services provided to Mason. The Contractor further certifies that they will maintain the insurance coverage during the entire term of the Contract and that all insurance is to be placed with insurers with a current reasonable A.M. Best's rating authorized to sell insurance in the Commonwealth of Virginia by the Virginia State Corporation Commission. The Commonwealth of Virginia and Mason shall be named as an additional insured. By requiring such minimum insurance, Mason shall not be deemed or construed to have assessed the risk that may be applicable to the Contractor. The Contractor shall assess its own risks and, if it deems appropriate and/or prudent, maintain higher limits and/or broader coverage. The Contractor is not relieved of any liability or other obligations assumed or pursuant to this Contract by reason of its failure to obtain or maintain insurance in sufficient amounts, duration, or types.

1. Commercial General Liability Insurance in an amount not less than \$1,000,000 per occurrence for bodily injury or property damage, personal injury and advertising injury, products and completed operations coverage;
2. Workers Compensation Insurance in an amount not less than that prescribed by statutory limits; and, as applicable;
3. Commercial Automobile Liability Insurance applicable to bodily injury and property damage, covering owned, non-owned, leased, and hired vehicles in an amount not less than \$1,000,000 per occurrence; and
4. An umbrella/excess policy in an amount not less than five million dollars (\$5,000,000) to apply over and above Commercial General Liability, Employer's Liability, and Commercial Automobile Liability Insurance.

CC. INTELLECTUAL PROPERTY: Contractor warrants and represents that it will not violate or infringe any intellectual property right or any other personal or proprietary right and shall indemnify and hold harmless Mason against any claim of infringement of intellectual property rights which may arise under this Contract.

1. Unless expressly agreed to the contrary in writing, all goods, products, materials, documents, reports, writings, video images, photographs or papers of any nature including software or computer images prepared or provided by Contractor (or its subcontractors) for Mason will not be disclosed to any other person or entity without the written permission of Mason.
2. Work Made for Hire. Contractor warrants to Mason that Mason will own all rights, title and interest in any and all intellectual property rights created in the performance or



otherwise arising from the Contract and will have full ownership and beneficial use thereof, free and clear of claims of any nature by any third party including, without limitation, copyright or patent infringement claims. Contractor agrees to assign and hereby assigns all rights, title, and interest in any and all intellectual property created in the performance or otherwise arising from the Contract, and will execute any future assignments or other documents needed for Mason to document, register, or otherwise perfect such rights. Notwithstanding the foregoing, for research collaboration pursuant to subcontracts under sponsored research contracts administered by the University's Office of Sponsored Programs, intellectual property rights will be governed by the terms of the grant or contract to Mason to the extent such grant or contract requires intellectual property terms to apply to subcontractors.

- DD. NON-DISCRIMINATION: All parties to this Contract agree to not discriminate on the basis of race, color, religion, national origin, sex, pregnancy, childbirth or related medical conditions, age (except where sex or age is a bona fide occupational qualification, marital status or disability).
- EE. PAYMENT TO SUBCONTRACTORS: The Contractor shall take the following actions upon receiving payment from Mason: (1) pay the subcontractor within seven days for the proportionate share of the total payment received from Mason attributable to the work performed by the subcontractor under that Contract; or (2) notify Mason and subcontractor within seven days, in writing, of its intention to withhold all or a part of the subcontractor's payment with the reason for nonpayment. b. If an individual contractor, provide social security number in order to receive payment. c. If a proprietorship, partnership or corporation provide Federal employer identification number. d. Pay interest to subcontractors on all amounts owed by the Contractor that remain unpaid after seven days following receipt by the Contractor of payment from the Institution for work performed by the subcontractor under that Contract, except for amounts withheld as allowed by prior notification. e. Accrue interest at no more than the rate of one percent per month. f. Include in each of its subcontracts a provision requiring each subcontractor to include or otherwise be subject to the same payment and interest requirements with respect to each lower-tier subcontractor.
- FF. PUBLICITY: The Contractor shall not use, in its external advertising, marketing programs or promotional efforts, any data, pictures, trademarks or other representation of Mason except on the specific written authorization in advance by Mason's designated representative.
- GG. REMEDIES: If the Contractor breaches this Contract, in addition to any other rights or remedies, Mason may terminate this Contract without prior notice.
- FF. RENEWAL OF CONTRACT: This Contract may be renewed for eight (8) successive one-year renewal options under the terms and conditions of this Contract except as stated in 1. and 2. below. Price increases may be negotiated only at the time of renewal. Written notice of the University's intention to renew shall be given approximately 90 days prior to the expiration date of each contract period.
1. If the University elects to exercise the option to renew the Contract for an additional one-year period, the Contract price(s) for the additional one year shall not exceed the Contract price(s) of the original Contract increased/decreased by more than the percentage increase/decrease of the "other goods and services" category of the CPI-U section of the Consumer Price Index of the United States Bureau of Labor Statistics for the latest twelve months for which statistics are available or 2%, whichever is lower.
 2. If during any subsequent renewal periods, the University elects to exercise the option to renew the Contract, the Contract price(s) for the subsequent renewal period shall not exceed the Contract price(s) of the previous renewal period increased/decreased by more

than the percentage increase/decrease of the “other goods and services” category of the CPI-U section of the Consumer Price Index of the United States bureau of Labor Statistics for the latest twelve months for which statistics are available, or 2%, whichever is lower.

- II. REPORTING OF CRIMES, ACCIDENTS, FIRES AND OTHER EMERGENCIES: Any Mason Employee, including contracted service providers, who is not a staff member in Counseling and Psychological Services (CAPS) or a pastoral counselor, functioning within the scope of that recognition, is considered a “Campus Security Authority (CSA).” CSAs must promptly report all crimes and other emergencies occurring on or near property owned or controlled by Mason to the Department of Police & Public Safety or local police and fire authorities by dialing 9-1-1. At the request of a victim or survivor, identifying information may be excluded from a report (e.g., names, initials, contact information, etc.). Please visit the following website for more information and training: <http://police.gmu.edu/clery-act-reporting/campus-security-authority-csa/>.”
- JJ. RESPONSE TO LEGAL ORDERS, DEMANDS, OR REQUESTS FOR DATA: Except as otherwise expressly prohibited by law, Contractor will: i) immediately notify Mason of any subpoenas, warrants, or other legal orders, demands or requests received by Contractor seeking University Data; ii) consult with Mason regarding its response; iii) cooperate with Mason’s reasonable requests in connection with efforts by Mason to intervene and quash or modify the legal order, demand or request; and iv) upon Mason’s request, provide Mason with a copy of its response.
- If Mason receives a subpoena, warrant, or other legal order, demand (including request pursuant to the Virginia Freedom of Information Act) or request seeking University Data maintained by Contractor, Mason will promptly provide a copy to Contractor. Contractor will promptly supply Mason with copies of data required for Mason to respond, and will cooperate with Mason’s reasonable requests in connection with its response.
- KK. SEVERABILITY: Should any portion of this Contract be declared invalid or unenforceable for any reason, such portion is deemed severable from the Contract and the remainder of this Contract shall remain fully valid and enforceable.
- LL. SOVEREIGN IMMUNITY: Nothing in this Contract shall be deemed a waiver of the sovereign immunity of the Commonwealth of Virginia and of Mason.
- MM. SUBCONTRACTS: No portion of the work shall be subcontracted without prior written consent from Mason. In the event that the Contractor desires to subcontract some part of the work specified herein, the Contractor shall furnish Mason the names, qualifications and experience of their proposed subcontractors. The Contractor shall, however, remain fully liable and responsible for the work to be done by its subcontractor(s) and shall assure compliance with all requirements of this Contract. This paragraph applies to, but is not limited to, subcontractor(s) who process University Data.
- NN. SWaM CERTIFICATION: Contractor agrees to fully support the Commonwealth of Virginia and Mason’s efforts related to SWaM goals. Upon contract execution, Contractor (as determined by Mason and the Virginia Department of Small Business and Supplier Diversity) shall submit all required documents necessary to achieve SWaM certification to the Department of Small Business and Supplier Diversity within 90 days. If Contractor is currently SWaM certified, Contractor agrees to maintain their certification for the duration of the Contract and shall submit all required renewal documentation at least 30 days prior to existing SWaM expiration at <https://www.sbsd.virginia.gov/>.
- OO. UNIVERSITY DATA: University Data includes all Mason owned, controlled, or collected PII and any other information that is not intentionally made available by Mason on public websites, including but not limited to business, administrative and financial data, intellectual property, and

patient, student and personnel data. Contractor agrees to the following regarding University Data it may collect or process as part of this Contract:

1. Contractor will use University Data only for the purpose of fulfilling its duties under the Contract and will not share such data with or disclose it to any third party without the prior written consent of Mason, except as required by the Contract or as otherwise required by law. University Data will only be processed by Contractor to the extent necessary to fulfill its responsibilities under the Contract or as otherwise directed by Mason.
2. University Data, including any back-ups, will not be accessed, stored, or transferred outside the United States without prior written consent from Mason. Contractor will provide access to University Data only to its employees and subcontractors who need to access the data to fulfill Contractor's obligations under the Contract. Contractor will ensure that employees who perform work under the Contract have read, understood, and received appropriate instruction as to how to comply with the data protection provisions of the Contract and to maintain the confidentiality of the University Data.
3. The parties agree that as between them, all rights including all intellectual property rights in and to University Data shall remain the exclusive property of Mason, and Contractor has a limited, nonexclusive license to use the University Data as provided in the Contract solely for the purpose of performing its obligations under the Contract. The Contract does not give a party any rights, implied or otherwise, to the other party's data, content, or intellectual property, except as expressly stated in the Contract.
4. Contractor will take reasonable measures, including audit trails, to protect University Data against deterioration or degradation of data quality and authenticity. Contractor shall be responsible for ensuring that University Data, per the Virginia Public Records Act, is preserved, maintained, and accessible throughout their lifecycle, including converting and migrating electronic data as often as necessary so that information is not lost due to hardware, software, or media obsolescence or deterioration.
5. Contractor shall notify Mason within three business days if it receives a request from an individual under any applicable law regarding PII about the individual, including but not limited to a request to view, access, delete, correct, or amend the information. Contractor shall not take any action regarding such a request except as directed by Mason.
6. If Contractor will have access to University Data that includes "education records" as defined under the Family Educational Rights and Privacy Act (FERPA), the Contractor acknowledges that for the purposes of the Contract it will be designated as a "school official" with "legitimate educational interests" in the University education records, as those terms have been defined under FERPA and its implementing regulations, and the Contractor agrees to abide by the limitations and requirements imposed on school officials. Contractor will use the education records only for the purpose of fulfilling its duties under the Contract for Mason's and its end user's benefit, and will not share such data with or disclose it to any third party except as provided for in the Contract, required by law, or authorized in writing by the University.
7. Mason may require that Mason and Contractor complete a Data Processing Addendum ("DPA"). If a DPA is completed, Contractor agrees that the information in the DPA is accurate. Contractor will only collect or process University Data that is identified in the DPA and will only handle that data (e.g., type of processing activities, storage, security, disclosure) as described in the DPA. If Contractor intends to do anything regarding University Data that is not reflected in the DPA, Contractor must request an amendment to the DPA and may not take the intended action until the amendment is approved and



documented by Mason.

- PP. UNIVERSITY DATA SECURITY: Data security is of paramount concern to Mason. Contractor will utilize, store and process University Data in a secure environment in accordance with commercial best practices, including appropriate administrative, physical, and technical safeguards, to secure such data from unauthorized access, disclosure, alteration, and use. Such measures will be no less protective than those used to secure Contractor's own data of a similar type, and in no event less than reasonable in view of the type and nature of the data involved. At a minimum, Contractor shall use industry-standard and up-to-date security tools and technologies such as anti-virus protections and intrusion detection methods to protect University Data.
1. Immediately upon becoming aware of circumstances that could have resulted in unauthorized access to or disclosure or use of University Data, Contractor will notify Mason, fully investigate the incident, and cooperate fully with Mason's investigation of and response to and remediation of the incident. Except as otherwise required by law, Contractor will not provide notice of the incident directly to individuals who's PII was involved, regulatory agencies, or other entities, without prior written permission from Mason.
 2. If Contractor provides goods and services that require the exchange of sensitive University Data, the Data Security Addendum attached to this Contract provides additional requirements Contractor must take to protect the University Data. Mason reserves the right to determine whether the University Data involved in this Contract is sensitive, and if it so determines it will provide the Data Security Addendum to Contractor and it will be attached to and incorporated into this contract. Types of University Data that may be considered sensitive include, but is not limited to, (1) PII; (2) credit card data; (3) financial or business data which has the potential to affect the accuracy of the University's financial statements; (4) medical or health data; (5) sensitive or confidential business information; (6) trade secrets; (7) data which could create a security (including IT security) risk to Mason; and (8) confidential student or employee information.
 3. Mason reserves the right in its sole discretion to perform audits of Contractor, at Mason's expense, to ensure compliance with all obligations regarding University Data. Contractor shall reasonably cooperate in the performance of such audits. Contractor will make available to Mason all information necessary to demonstrate compliance with its data processing obligations. Failure to adequately protect University Data or comply with the terms of this Contract with regard to University Data may be grounds to terminate this Contract.
- QQ. UNIVERSITY DATA UPON TERMINATION OR EXPIRATION: Upon termination or expiration of the Contract, Contractor will ensure that all University Data are securely returned or destroyed as directed by Mason in its sole discretion within 180 days of the request being made. Transfer to Mason or a third party designated by Mason shall occur within a reasonable period of time, and without significant interruption in service. Contractor shall ensure that such transfer/migration uses facilities and methods that are compatible with the relevant systems of Mason or its transferee, and to the extent technologically feasible, that Mason will have reasonable access to University Data during the transition. In the event that Mason requests destruction of its data, Contractor agrees to destroy all data in its possession and in the possession of any subcontractors or agents to which the Contractor might have transferred University Data. Contractor agrees to provide documentation of data destruction to the University.

Contractor will notify the University of any impending cessation of its business and any contingency plans. This includes immediate transfer of any previously escrowed assets and University Data and providing Mason access to Contractor's facilities to remove and destroy Mason-owned assets and



University Data. Contractor shall implement its exit plan and take all necessary actions to ensure a smooth transition of service with minimal disruption to Mason. Contractor will also provide a full inventory and configuration of servers, routers, other hardware, and software involved in service delivery along with supporting documentation, indicating which if any of these are owned by or dedicated to Mason. Contractor will work closely with its successor to ensure a successful transition to the new equipment, with minimal downtime and effect on Mason, all such work to be coordinated and performed in advance of the formal, final transition date.

RR. UNIVERSITY REVIEW/APPROVAL: All goods, services, products, design, etc. produced by the Contractor for or on behalf of Mason are subject to Mason's review and approval.

SS. WAIVER: The failure of a party to enforce any provision in this Contract shall not be deemed to be a waiver of such right.

Contractor Name

George Mason University

Signature

Signature

Name: _____

Name: _____

Title: _____

Title: _____

Date: _____

Date: _____



Data Security Addendum for inclusion in GMU-1859-23 with George Mason University (the "University")

This Addendum supplements the above-referenced Contract between the University and _____ ("Selected Firm/Vendor") dated _____ (the "Contract"). It is applicable only in those situations where the Selected Firm/Vendor provides goods or services under a Contract or Purchase Order which necessitate that the Selected Firm/Vendor create, obtain, transmit, use, maintain, process, store, or dispose of Sensitive University Data (as defined in the Definitions Section of this Addendum) as part of its work under the Contract.

This Addendum sets forth the terms and conditions pursuant to which Sensitive University Data will be protected by the Selected Firm/Vendor during the term of the Parties' Contract and after its termination.

1. Definitions

Terms used herein shall have the same definition as stated in the Contract. Additionally, the following definitions shall apply to this Addendum.

- a. **"Personally Identifiable Information ("PII")** means any information that can be connected to a specific person and may include but is not limited to personal identifiers such as name, address, phone, date of birth, Social Security number, student or personal identification numbers, driver's license numbers, state or federal identification numbers, non-directory information and any other information protected by state or federal privacy laws.
- b. **"University Data"** includes all University owned Personally Identifiable Information and other information that is not intentionally made generally available by the University on public websites, including but not limited to business, administrative and financial data, intellectual property, and patient, student and personnel data.
- c. **"Sensitive University Data"** means data identified by University to Selected Firm/Vendor as Sensitive University Data and may include, but is not limited to: (1) PII; (2) credit card data; (3) financial or business data which has the potential to affect the accuracy of the University's financial statements; (4) medical or health data; (5) sensitive or confidential business information; (6) trade secrets; (7) data which could create a security (including IT security) risk to the University; and (8) confidential student or employee information.
- d. **"Securely Destroy"** means taking actions that render data written on media unrecoverable by both ordinary and extraordinary means. These actions must meet or exceed those sections of the National Institute of Standards and Technology (NIST) SP 800-88 guidelines relevant to data categorized as high security.
- e. **"Security Breach"** means a security-relevant event in which the security of a system or procedure used to create, obtain, transmit, maintain, use, process, store or dispose of data is breached, and in which University Data is exposed to unauthorized disclosure, access, alteration, or use.
- f. **"Services"** means any goods or services acquired by the University from the Selected Firm/Vendor.

2. Data Security

- a. In addition to the security requirements stated in the Contract, Selected Firm/Vendor warrants that all electronic Sensitive University Data will be encrypted in transmission (including via web interface) and stored at no less than 128-bit level encryption. Additionally, Selected Firm/Vendor warrants that all Sensitive University Data shall be Securely Destroyed, when destruction is requested by University.
- b. If Selected Firm/Vendor's use of Sensitive University Data include the storing, processing or transmitting of credit card data for the University, Selected Firm/Vendor represents and warrants that for the life of the Contract and while Selected Firm/Vendor has possession of University customer cardholder data, the software and services used for processing transactions shall be compliant with standards established by the Payment Card Industry (PCI) Security Standards Council (www.pcisecuritystandards.org). In the case of a third-party application, the application will be listed as PA-DSS compliant at the time of implementation by the University. Selected Firm/Vendor acknowledges and agrees that it is responsible for the security of all University customer cardholder data or identity information managed, retained, or maintained by Selected Firm/Vendor, including but not limited to protecting against fraudulent or unapproved use of such credit card or identity information. Selected Firm/Vendor agrees to indemnify and hold the University, its officers, employees, and agents, harmless for, from, and against any and all claims, causes of action, suits, judgments, assessments, costs (including reasonable attorneys' fees), and expenses arising out of or relating to any loss



of University customer credit card or identity information managed, retained, or maintained by Selected Firm/Vendor, including but not limited to fraudulent or unapproved use of such credit card or identity information. Selected Firm/Vendor shall, upon written request, furnish proof of compliance with the Payment Card Industry Data Security Standard (PCI DSS) within 10 business days of the request. Selected Firm/Vendor agrees that, notwithstanding anything to the contrary in the Contract or the Addendum, the University may terminate the Contract immediately without penalty upon notice to the Selected Firm/Vendor in the event Selected Firm/Vendor fails to maintain compliance with the PCI DSS or fails to maintain the confidentiality or integrity of any cardholder data.

3. Employee Background Checks and Qualifications

- a. In addition to the employee background checks provided for in the Contract, Selected Firm/Vendor shall perform the following background checks on all employees who have potential to access Sensitive University Data: Social Security Number trace; seven (7) year felony and misdemeanor criminal records check of federal, state, or local records (as applicable) for job related crimes; Office of Foreign Assets Control List (OFAC) check; Bureau of Industry and Security List (BIS) check; and Office of Defense Trade Controls Debarred Persons List (DDTC).

4. Insurance

- a. In addition to the insurance requirements outlined in the University's Contract, Selected Firm/Vendor agrees to maintain Cyber Liability Insurance in an amount not less than \$2,000,000 per incident, for the entire term of the Contract. The Commonwealth of Virginia and the University shall be named as an additional insured.

5. Security Breach

- a. Liability. In addition to any other remedies available to the University under law or equity, Selected Firm/Vendor will reimburse the University in full for all costs incurred by the University in investigation and remediation of any Security Breach of Sensitive University Data, including but not limited to providing notification to individuals whose Personally Identifiable Information was compromised and to regulatory agencies or other entities as required by law or contract; providing one year's credit monitoring to the affected individuals if the Personally Identifiable Information exposed during the breach could be used to commit financial identity theft; and the payment of legal fees, audit costs, fines, and other fees imposed by regulatory agencies or contracting partners as a result of the Security Breach.

6. Audits

- a. Selected Firm/Vendor will at its expense conduct or have conducted at least annually a: security audit with audit objectives deemed sufficient by the University, which attests the Selected Firm/Vendor's security policies, procedures and controls; ii) vulnerability scan, performed by a scanner approved by the University, of Selected Firm/Vendor's electronic systems and facilities that are used in any way to deliver electronic services under the Contract; and iii) formal penetration test, performed by a process and qualified personnel approved by the University, of Selected Firm/Vendor's electronic systems and facilities that are used in any way to deliver electronic services under the Contract.
- b. Additionally, the Selected Firm/Vendor will provide the University upon request the results of the above audits, scans and tests, and will promptly modify its security measures as needed based on those results in order to meet its obligations under the Contract. The University may require, at University expense, the Selected Firm/Vendor to perform additional audits and tests, the results of which will be provided promptly to the University.
- c. AICPA SOC Report (Type II)/per SSAE18: Selected Firm/Vendor must provide the University with its most recent Service Organization Control (SOC) audit report and that of all subservice provider(s) relevant to the Contract. It is further agreed that the SOC report, which will be free of cost to the University, will be provided annually, within 30 days of its issuance by the auditor. The SOC report should be directed to the appropriate representative identified by the University. Selected Firm/Vendor also commits to providing the University with a designated point of contact for the SOC report, addressing issues raised in the SOC report with relevant subservice provider(s), and responding to any follow up questions posed by the University in relation to the SOC report.



IN WITNESS WHEREOF, this Addendum has been executed by an authorized representative of each party as of the date set forth beneath such party’s designated representative’s signature.

Selected Firm/Vendor

George Mason University

Signature

Signature

Name: _____

Name: _____

Title: _____

Title: _____

Date: _____

Date: _____

Appendix A

Student Lifecycle Transformation

Statement of Work

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Introduction

George Mason University (herein referred to as “Mason”) is seeking an experienced vendor to design, develop, and implement a holistic systems and organizational transformation effort that leverages our recently purchased Salesforce suite of tools.

As part this effort, the selected vendor should have the expertise to complement Mason’s efforts to merge from two information repositories of student data (undergraduate and graduate organizations, aka “orgs”) to one new comprehensive and coordinated student lifecycle.

For the purposes of this RFP, we are seeking a solution to support our offices of Enrollment Management, Undergraduate and Graduate Admissions, Graduate Division, Undergraduate Education, and University Life. The end goal is to provide Mason with an optimal Customer Relationship Management (CRM) system that can be integrated into existing systems and aligned with the University’s strategic goals.

To successfully implement, execute, and sustain a project of this scale and complexity, it is Mason’s intention to partner with a vendor who will work with Mason’s stakeholders and constituents during all implementation phases. These phases include strategic planning, business process review, design, build, validation, transition, and initial post-go-live support. Additionally, the vendor will collaborate with Mason leadership to determine the appropriate resource allocation level required to complete the implementations within an ideal target time frame and will provide the Mason community with the customer services necessary to successfully execute and sustain this project.

1. Background

Mason is the largest public research university in Virginia, serving more than 39,000 students from all 50 states and over 130 countries. Our identity was forged in 1972 building upon Virginia's strong ideals of academic excellence and service. Today, that spirit energizes us as a leader in scholarship and research and strengthens our commitment to prepare career-ready graduates who can meet the complex needs of a rapidly changing world. As a research-intensive (R1) university, we set the standard for a bold and progressive education that serves our students and communities. Established by the Commonwealth of Virginia in the National Capital Region, Mason's purpose is to collectively enable the future success of Mason community members through the advancement and sharing of knowledge. Mason's goal is to provide opportunities for those who seek a quality education in a manner that positions them for excellence in life.

2. Executive Overview

As Mason celebrates its first 50 years of service, it has grown to four campuses and seven dedicated sites in Northern Virginia. Its continued growth and diversification of its student population has required the University to rapidly evaluate and reimagine the current student experience to anticipate changing student needs, and improve overall student outcomes. The current system for providing support and services to students requires improvement and Mason has concluded that a new way of working that is focused on delivering an end-to-end student experience that is seamless, transparent, responsive, and personalized to the user will be established.

As a result, in 2016, the Enrollment Management division began exploring the use of Salesforce as a CRM platform for enrollment operations and admissions processes. To meet this business need, in 2017, Mason partnered with Salesforce partner TargetX to provide scalable admission applications, event, and communications functionality within Salesforce. Along with the TargetX tools, three other core Apps were implemented – FormAssembly, Informatica, and DemandTools. Over the next several years, features and functionality within Salesforce were used to continue growing the needs of Enrollment Management. In 2019, use of Salesforce on campus was expanded, primarily around the functions within Service Cloud, and an SMS package, Mogli, was added.

As the student population continued to grow, the need for a coordinated infrastructure to provide better student coaching and advising and amplify other student services became apparent. Consequently, two sections of the provost's office: Undergraduate Education and University Life have sought solutions in the Navigate product, a Student Success Management System (SSMS) created and owned by EAB. Navigate and these processes have allowed staff and faculty from many units to have access to student information and program enrollment, and support students in their academic, co-curricular, and student support needs through appointment scheduling, intentional outreach, note and engagement tracking. Note: This SSMS has mostly been used by the Mason undergraduate community.

As the utilization of Salesforce matured, the University decided to explore other Salesforce capabilities and integrate some of its Education Cloud features, including Student Success Hub (SSH) and Admissions Connect. Mason's goal is to utilize the Core Salesforce Education products as its central, enterprise-wide, and student-facing support hub for engagement across the entire student academic journey. A more coordinated use of information systems and data should allow a more streamlined, efficient, transparent, and accessible implementation of student related processes at the institution. The University has also recognized the need to invest in a new marketing communication tool. Mason has explored a few different options, such as Marketing Cloud and Pardot, among others, but has not committed to any system yet.

To implement this realignment, Mason leadership has approved the integration from Mason's current-state

of two Salesforce Orgs (Lifecycle/Undergraduate [UG] and Graduate [GR]) into one Org serving all students and their respective needs and a transition from its student Coaching and Advising systems to the Salesforce Education Cloud. This new Org should become the enterprise-wide, student-facing system of engagement, providing a 360-degree view of all prospective and current students. Complemented with Salesforce Education Cloud's SSH and Admission Connect, this new Org should also support both undergraduate and graduate student individual needs, from the prospective student experience (e.g., pre-enrollment, application) through the new and current student experience (e.g. enrollment, matriculation, student engagement and support) to alumni (e.g. career outcomes). It is important to note that Mason recently launched a Graduate Division and is in the process of expanding graduate student success support and refining graduate recruitment, communications and admission needs. Because of the evolving landscape, not all requirements related to service to graduate education are represented in this document, and additional requirements gathering will be needed during this process. Overall, the needs and requirements for graduate programs and students in the new Org will require additional time and resources for implementing each of the new tools.

Overview of Salesforce Work to Date

2010	2016	2017	2019-2020	2022	2021-2022
The School of Business Implementation	SER	TargetX Implementation	Lifecycle for OneStop/ Executive Leadership Changes	Lifecycle Expansion	Mason Foundation Implementation
The School of Business was the first adopter of Salesforce at Mason; initially for academic advising and career counseling; later expanded and integrated with Banner	Mason launched the Student Experience Redesign project and committed to replacing Hobson's Radius and Connect for Undergraduate and Graduate recruitment and admissions	Enrollment Management selected Salesforce/ TargetX to support Admissions (UG and Grad) needs.	New President(s) and Provost appointed; these new executives and key stakeholders came together to improve the student experience, identify areas of improvement, and explore Salesforce's capabilities to enhance CRM	Mason made progress towards institutional commitment to Salesforce and expansion of the Lifecycle management platform and Mason360	Mason Foundation made the decision to transition from Ellucian Advance to Salesforce/ Afina quest and is the newest user of the platform at Mason

NOTE: Advancement Foundation org is not in scope of this implementation

NOTE: Other instances of Salesforce exist at Mason to support various non-student related functions. These instances are out of scope for this project.

3. Assessment Findings

In preparation for this project and in partnership with a consulting agency, Mason sought to implement a more comprehensive strategy aimed at increasing Salesforce effectiveness and improving the Constituent experience across the institution. This assessment of some current Mason business processes identified opportunities for improvement and developed a plan to optimize processes and technology to support Mason's strategic objectives.

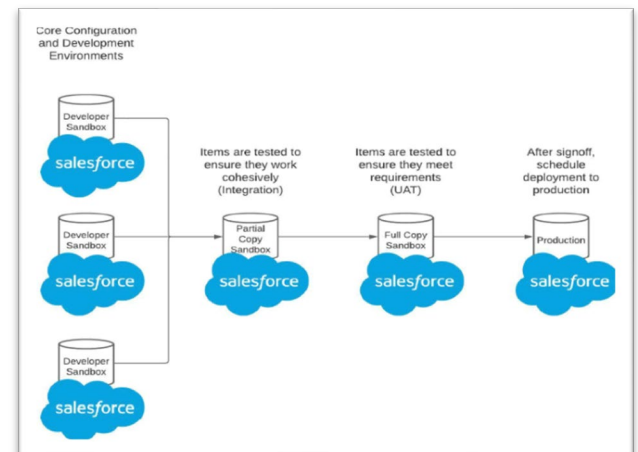
The outcomes for the engagement defined the below implementation recommendations:

- Education Cloud on the Education Data Architecture/Framework
- Admissions Connect as a replacement for TargetX Application functions. Current Admission functionality must be configured or built into the eventual solution, including
 - Events – including Campus Tours, Recruitment, Travel, and on boarding events like Orientation, Experience Mason, or EDGE (<https://edge.gmu.edu/>)
 - Payment, variable by type of guests attending
 - Application and requirement collection (Flexible and Dynamic by population)
 - Variety of application launch and closing dates exist
 - Programs (Majors, Degrees) configured in Salesforce – power public webpage – on Programs and deadlines – currently based on a custom object.
 - Payment, variable by population and/or fee waiver types, and/or type of application
 - Decision letter delivery and presentation (Flexible and Dynamic by population)
 - Portal for Application Management and/or Yield Onboarding (Flexible and Dynamic by population)
 - All Mason payments collected as part of this implementation, must be done via TouchNet.
- Student Success Hub (formerly Advisor Link): Provide a collaborative environment for academic advisors, success coaches, faculty, professional and student staff, and other areas of the University to efficiently assist in academic success, engagement, and support of our constituents. Pertinent functionality that exists in the current system, Navigate and School of Business Salesforce, must be identified and included within the newly designed and enhanced coaching and advising services expected within Mason's new Salesforce and SSH environment. The following is not an exhaustive list, but should be included in the MVP/Initial launch:
 - Appointment scheduling and referrals, integrated with Office 365
 - Note-taking
 - Attractive and user-friendly student information dashboard with integration of Banner and Stellar tools (tailored to user)
 - Direct and group (campaign) communication with students via email and SMS
 - Customization: user roles, student tagging
 - Reporting and analytics on student success (population health) and user services (like appointment reports)
- Mass Communication platform: Marketing Cloud or Pardot-like product. Mason is committed to using a Salesforce native/connected Mass emailing system. Mason received a recommendation from a consultant to use Marketing Cloud but Mason is open to considering other Salesforce Email solutions where appropriately put forward by the vendor, given their expertise and experience.
 - This should include the establishing of best practice on managing the mass emailing of students
 - The integration with SIS for current students
 - Migration of current mass email data
 - Email and Response routing configuration

- Service Cloud: Utilizing native functionality of the Salesforce Service platform to better serve Mason constituents where they are at – whether that is Knowledge, Chat, SMS, Email, Communities, or other integrated methods. Constituents include Mason Faculty and Staff
- Experience Cloud: facilitates the creation of online portal platform(s) to reach students and other Mason constituents in a frictionless, consistent way. Create public Knowledge Communities / Experiences to help constituents self-serve where possible
- Chat bot: Working within Salesforce Chat option, or potentially the partnership Mason has with Amazon, and the Amazon chat bot – to help off load easily answered questions
- Business Analytics: Clear and precise visualizations that help alert staff to student situations are key to system adoption and usage. This type of reporting is key to staff effectiveness and usage. Mason is open to reviewing and considering recommendations put forward by the vendor. We are interested in real-time predictive modeling native to the platform.
- Integration: The new ORG will require a student feed from the SIS (Banner). Existing feed to EAB/Navigate, BUS Org can be evaluated for repurposing or a base for upgrading and improving
 - What “tasks” within the NEW Org need update the SIS, so that 2-way integration is needed
 - How will that integration take place – API, Batch, other
- Integration Platform: Mason is committed to two existing integration platforms (ETHOS, Informatica) but is open to considering other proposals as appropriately put forward by the vendor, given their expertise and experience. Potential integration with other tools (ie digital marketing tools, Blackboard, etc.)
- Data Migration: Allows for a documented and systemic method for migrating data elements from SFLC and GR instances, transforming those data as necessary, and loading them into the single org. This migration will be needed for each part of the implementation into the New Org:
 - Data from EAB Navigate to Student Success Hub (SSH)
 - School of Business Data (without duplicating data that is already pushed into EAB/Navigate)
 - Data from UG TargetX implementation to Admissions Connect
 - Data from GR TargetX to Admissions Connect
 - TargetX mass email data to new org
 - Mason Student Service Center data (MSSC, One Stop Shop) into Service Cloud/New Org
 - Migration of CTI connection to a New Org (when MSSC is moved)
- Disaster Recovery and Backup: Mason has contracted with OwnBackup as its preferred solution. Within that context, Mason considers implementation partner review of this solution’s configuration and processes as an element of our new Org implementation project, options appropriately as needed for this Project.
- Release Management: Winning vendor will follow a structured release management approach and DevOps standards that follows best practice for environment management. All build components and support structured releases, as well as hot fix/production problem issues, will follow;
 - Developer/Sandbox, QA, UAT, Production to ensure consistency and compatibility across the platform (version control, automated deployments, and modular architecture) to ensure all code deployment is coordinated

4. High Level Needs and Requirements

- **Governance:** A Salesforce Center of Excellence acts as a central governing body for the entire organization. It brings together stakeholders from across the organization to create a single, well-defined group that is responsible for making decisions when it comes to Salesforce.
- **Security:** The security functions of confidentiality, integrity and availability are largely implemented through the security controls that exist within Salesforce. For Mason, some of the data loaded into Salesforce is protected by the Family Education Rights and Privacy Act (FERPA). In addition, depending on needs there may be other personally identifiable information stored in the solution. Security mechanisms should be implemented so that there is no undue risk to the data.
- **Decentralized Central Model:** The recommended organizational approach is one where ITS controls the Org, but the business units drive innovation. The ITS Salesforce Team includes a Salesforce Architect, Salesforce Developers, Salesforce Administrators, Business Analysts, and a Scrum Master. ITS is responsible for DevOps and runs QA on functionality developed for the business units. Each business unit's staff includes a Product Owner(s), Subject Matter Expert(s) (SME), Power User(s), and, depending on the unit, may also include Salesforce Administrators and Business Analysts to work in tandem with central ITS resources.
- **Agile Development Methodology with Work Intake and Prioritization:** Agile is an approach to product delivery that helps teams mitigate unpredictability through incremental, iterative work cadences. At the core is Scrum, a project management framework that promotes short cycles, iteration, learning, and team improvement, as well as getting and measuring feedback to ship the next increment of a product. suggests that Mason start with a Kanban framework, where work items are represented visually on a Kanban board so team members can see the status of all work items and each team member is only working on a single item at a time.
- **Dev Ops:** DevOps practices like version control, automated deployments, and modular architecture help teams to coordinate and maintain high performance as they grow. To scale effectively, the practices of DevOps are essential.
- **Master Data Management and Data Warehousing:** Clean constituent data should be curated so Mason can implement a Master Data Management (MDM) strategy to ensure its record repository can be leveraged effectively by the Salesforce and other integrated systems.
- **Disaster Recovery and Continuity of Operations (COOP):** A formal disaster recovery and business continuity plan should be developed to allow Mason to operate and remain as resilient as possible in times of uncertainty. This business continuity planning involves pro-actively defining the process Mason would undertake to deal with possible threats that may affect Mason's means to operate the Salesforce Org effectively.



5. Program Scope, Illustrative Phases and Tentative Timeline

5.1. Program Scope:

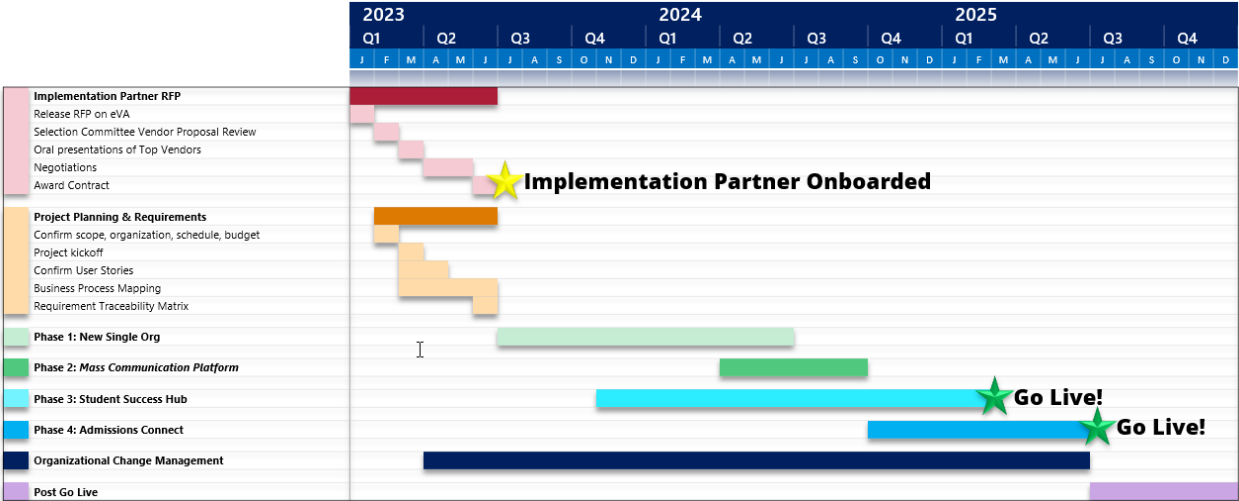
The George Mason University Student Lifecycle Transformation will provide an enterprise-wide, student-facing system of engagement, enabling a 360-degree view of all students by implementing a new future state Single Lifecycle Org utilizing the Salesforce Education Cloud. This transformation will place all functionality in one platform beginning with pre-enrollment, moving through application, enrollment, attendance, matriculation, academic engagement and support, degree completion, and eventual success as proud Mason alums.

5.2. Illustrative Phases

Phase	Description
Phase 1:	<i>Build (refactor) into a new Single Lifecycle Org</i> Students included; Undergrad, Graduate, Business School <ul style="list-style-type: none"> • Business School Coaching and Advising functions will move into single Lifecycle org • Remaining Business School org functions, need confirmation on their transition
Phase 2:	<i>Implement Mass Communication Platform (ie. Marketing Cloud or another tool as recommended by vendor)</i>
Phase 3:	<i>Implement Student Success Hub</i> Build a new tool that better meets our institutional needs while brining existing Navigate platform and BUS org user groups into the Student Success Hub tool with current functionality and existing workflows fully represented in the new tool. This includes user roles ranging from student users to professional power users. Further, it includes customizations related to particular functions, such as academic advising and integration with the Stellic degree audit and planning tool. Expected phases include: <ul style="list-style-type: none"> • Business requirement mapping and review, including current business process and gap analysis for ideal state • Build Mason's SSH interface with current and enhanced functionality • Pilot: representative sample of cross-functional users <ul style="list-style-type: none"> ○ With small group ○ Debug ○ Need User/Role matrix defined • Transition all existing Navigate Users • Build out additional needed functionality and bring in additional user groups • Embedded throughout should be training and onboarding resource development for users • Self-service, in-application guidance for standard tasks will be required to supplement initial onboarding
Phase 4:	<i>Implement Admissions Connect</i> Consolidate Admissions application hosting, processing, and decision-making functions within one system, and replace the current TargetX Application Review Tool. Admissions will sunset the use of TargetX Application objects, and will use native Salesforce objects in conjunction with Admissions Connect objects to achieve this goal. All Admissions application processing and decision-making functionality will be housed within the Admissions Connect module, which must have real/near-real-time integration with both Mason's SIS (Banner) and external applications, including the Common Application. This system must: <ul style="list-style-type: none"> • Have the ability to host multiple applications with varying deadlines; • Support real/near-real-time integration with Mason's SIS • Support, at minimum, the current functionality and scope of the TargetX tool in terms of admissions processing and decision-making functions, including multiple, and often complex, review rounds at both the graduate and undergraduate level; • Sync with the communications and marketing tool to permit multi-channel marketing based on data housed within the specific application object(s); • Support multiple user types.



5.3. Tentative Timeline



6. Design, Development, and Implementation (DDI)

6.1. SDLC Approach

The Contractor shall utilize an Agile approach to System Development Lifecycle (SDLC) process to design, development, and implement the Mason system as well as to implement any fixes and enhancements. The Contractor's approach must incorporate iterative methods for development and testing of software. This Agile methodology shall break the project into smaller work efforts to realize the following goals:

- Development and deployment of a functioning component(s) at the end of every iteration that build upon each other
- Enabling frequent demonstrations of completed components
- Building stakeholder support for the Mason system throughout the life of the project, including through regular UAT efforts
- Detecting dependencies, risks, and/or issues as early as possible to make course corrections.
- Early detection of missing, incomplete, or inaccurate requirements
- Early detection of flaws and vulnerabilities
- Meet approved project schedule deadlines
- Creating an environment that lends itself to responsive design to provide a seamless user experience regardless of device
- Facilitating on-going project team learning and continuous process improvement
- Independent module level testing and cross module testing
- Scheduled and on-demand demos
- Flexible number of iterations to accommodate all the prioritized requirements within a module

The Contractor's Agile approach shall be based on known requirements realized and implemented using short cycles of analysis, design, development, and testing, enabling the system to evolve. An iteration is to be a distinct sequence of tasks focused on a desired goal within a time box, or simply multiple mini-projects that are part of a project phase.

The Contractor must create and lead an architecture-driven, iterative process that begins by prioritizing high-risk/high-payoff use cases within each module that have well-defined objectives and produce functionality ready for production release. Mason is expecting Agile development to occur on multiple modules simultaneously. The Contractor shall propose for Mason's approval which module iteration to start first and the number of iteration cycles needed within each module. Each successive iteration must build on the work of the Contractor's previous iterations to evolve and refine the system. The iterations can be released based on the Contractor's project schedule.

Even though the functional modules shall be developed using an Agile methodology at different time intervals, functional implementations shall begin after all User Acceptance Testing and QA testing has been completed and approved by Mason for that release.

6.2. SDLC Deliverables

This section describes the required minimum deliverables for the implementation by SDLC activity, unless otherwise approved by Mason. Given the Agile SDLC approach, the Contractor shall continue to keep each deliverable updated even after deliverable acceptance to reflect the latest progress in the project.

As part of the Implementation milestone, the Contractor must submit an updated version of all Discovery and Design deliverables with an asterisk (*) next to it for Mason review and acceptance at the end of Implementation (e.g., the Requirements Traceability Matrix must reflect the most updated information at the end of Implementation.) Payments to the Contractor will be triggered by the completion of three milestones: Discovery, Design, and Implementation.

Activity	Deliverables	Milestone
1. Planning	Project Schedule *	Discovery
	Requirements Confirmation Document	Discovery
2. Requirements Management	Requirements Document(s) *	Discovery
	Requirements Traceability Plan and Matrix (RTM) *	Discovery
3. Design and Development	Architectural Vision	Discovery
	System Traceability Model	Discovery
	Design and Development Plan	Discovery
	Conceptual Design	Design
	High Level Design (HLD)	Design
	Solution Detailed Design (SDD)	Design
	Solution Architecture Design (SAD)	Design
	Functional and Technical Design Documents *	Design
	Configuration Management Plan	Discovery
	Business Use Case(s) *	Design
	Business Rules Documentation *	Design
	User Interface Specification(s)	Discovery
	System Security Plan *	Design
	Reports and Forms Design Documents *	Design
	Process Flow Document(s) *	Design
	Glossary of Terms and Acronyms *	Design
4. Testing	Master Test Plan	Discovery
	Draft Automated Testing Scripts	Design
	Final Automated Testing Scripts	Implementation
	Test plans for each testing phase	Discovery
	Draft Test cases	Design
	Final Test cases	Implementation
	Completion of all applicable testing cycles	Implementation
	Draft Security Test Plan Report	Design
	Final Security Test Plan Report	Implementation
	UAT Report and Results	Implementation
	Draft System Integration Test Readiness Checklist	Design
	Final System Integration Test Readiness Checklist	Implementation
4. Data Conversion and Migration	Data Conversion and Migration Plan	Discovery
	Data dictionary, data models, data flow models *	Design
	Draft Conversion and Migration Results reports	Design
	Final Conversion and Migration Results reports	Implementation
5. Implementation	Phase Implementation Plans	Discovery
	Organizational Change Management Plan	Discovery
	Training Plan	Discovery
	Knowledge Transfer Plan	Discovery
	Completed training and training materials	Implementation
	Training logs to track users' training progress	Implementation
	Completed pilot implementation(s)	Implementation
	Completed Masonwide implementation	Implementation
	Formal System Acceptance Report	Implementation
6. Post-Implementation Support	Defects log	Implementation
	Final, updated deliverable documents and supporting work product documentation.	Implementation
	Source/object codes for all software components	Implementation

6.3. Planning

Requirements Confirmation Sessions. To ensure that the high-level functional requirements are accurate, the Contractor shall conduct the following requirements confirmation steps at the start of the contract:

- There will be a dedicated timeframe for the Contractor and Mason to meet with the key stakeholders to review business process diagrams, user stories and high-level requirements developed by Mason. In these sessions, all parties shall review the expected features and build a common understanding of requirements with the Contractor's design team. This shall also give the Contractor an opportunity to validate the sequencing of their proposed schedule.
- The Contractor shall meet with program staff to review the high-level requirements and user stories. The Contractor shall update the high-level requirements to reflect the feedback from these sessions.

The vendor shall schedule the Requirements Confirmation Sessions with the requisite time needed for thorough discussion. The Contractor must include time for the sessions in the project schedule. The end result of the Requirements Confirmation Sessions is a Requirements Confirmation Report that can be leveraged during subsequent sprints.

Prior to design beginning for any implementation and release, the Contractor shall complete the following planning documents based on their experience, proposed approach, and Mason input:

- Project Schedule
- Requirements Confirmation document

6.4. Requirements Management

Requirements management shall be key to ensuring the Mason system is implemented with all the approved functional and technical requirements, and meets all Mason requirements. The Contractor shall provide and implement application lifecycle management processes to manage requirements through the entire application lifecycle. The Contractor shall meet with all relevant stakeholders to understand business processes and workflows, understand all Mason requirements, and develop functional and technical requirements. The Contractor shall build detailed functional and technical requirements with relevant stakeholders through each sprint.

Traceability. The Contractor shall provide a Requirements Traceability Plan and Matrix that also includes a methodology for starting and maintaining system certification traceability from the start of the project through to implementation. Included in the plan must be relationships between business rules, policy, design, testing, reporting, and platform rules. Throughout the project, the Contractor must trace each functional and technical requirement from its origin through implementation. The Contractor must track and maintain a record of changes to requirements and/or development artifacts for the historical record and certification traceability. The Contractor must provide a vision and methodology for documenting and maintaining traceability throughout the Agile software development lifecycle, and back to source requirements. The Contractor shall be responsible for incorporating approved changes to the requirements and completing all traceability activities throughout the project.

Deliverables. The Contractor shall develop and keep updated the necessary requirements artifacts to successfully design, develop, and implement the Mason system. These deliverables include, but are not limited to, the following:

- Requirements Document(s)

- Requirements Traceability Plan and Matrix (RTM)

6.5. Design and Development

Design and Development Plan. The Contractor shall create and execute a Design and Development Plan aligned with the selected Agile methodology prior to initiating any design or development activities. The plan shall include but is not limited to the following:

- Purpose and Scope
 - Relationship to other plans
 - Resources - Roles and Responsibilities
 - Design and Development Approach
 - Assumptions and Constraints
 - Methodology Tools and Techniques
- Design
 - Agile Software Design Process and Standards – frameworks, future growth, User Interface (UI) design standards, interface standards.
 - User Considerations - characteristics, problem objective, workstation.
 - Design Tradeoffs
 - Handling of Critical Requirements
 - Safety and Security Assurance
 - Detailed Design
 - Reusable Software Products - incorporating and developing reusable software products, procured software
 - Risk Management
- Development
 - Agile Software Development Process – Sprint process overview, Sprint work package/software reviews, technical documentation, deliverables, deployment process.
 - Establishing Software Development Environment - developer workstation, software development library/files, and relationship to Software Configuration Management Plan.
 - Application Development Coding Standards - automatic code generation, code reuse, link/reference to external coding standards documentation.
 - Unit Testing - approach, use of testing frameworks and automation, peer reviews, metrics and measurements.
- Application Integration - revision and retesting, work package/system integration, work package/software release/implementation planning.

Conceptual Design. It is critical that all project releases are thoroughly planned and executed well. Prior to beginning design activities, the Contractor shall complete the Conceptual Design that verifies infrastructure components can be installed and integrated successfully.

Configuration Management Plan. The Contractor shall create and execute an Agile Configuration Management Plan. The plan shall include but is not limited to the following:

- Purpose and Scope
 - Relationship to other plans
 - Application Design and Development Plan
 - Data Management Plan
 - Hardware and Software Plan
 - Master Test Plan
 - Security Plan

- Service Governance Plan
 - Resources - Roles and Responsibilities
 - Benefits
 - Audience
- Configuration Management Areas:
 - Database – Organizing structural configuration and metadata settings
 - Hardware – Ensuring performance and functionality settings
 - Network – Coordinating multi-vendor device compliance
 - Security – Enforcing the hardening and compliance standards
 - Software – Managing code promotion / releases and auditing
- Software Configuration Management (SCM) Procedures
 - Configuration Identification - Software Product Classification, Test, Release, Build, Baseline, Source File, Document, Change Request
 - SCM, and Project Repositories
 - Configuration/Change Control – change tracking, change record definition and types, change request attributes
 - Status Accounting and Reporting
 - Configuration Audit/Verification – audits, build audits, test readiness review (TRR)
 - Release Administration and code promotion
 - Archive, Storage, Backup and Restore
- Development Environment
 - Product Control with Software Configuration Management Tools
 - Development Builds
 - Formal Builds
 - Implementation
- Documentation Repository Development Tools

Design and Development Execution. In executing the Design and Development Plan, the Contractor shall be responsible for the leading all design, development, and configuration activities, including but not limited to the following activities:

- Lead architecture, design, development, and configuration discussions.
- Organize and conduct design sessions with subject matter experts.
- Develop the technical environment specifications for the Mason system.
- Apply consistent development standards including coding, database, and field naming conventions, in alignment with industry standards.
- Perform necessary configuration, development, and testing required to implement the functional and technical design.
- Provide Mason with access to both source/object codes for software components and documentation. Note: All new software functionality built on top of any COTS software shall be owned by Mason.
- Produce updated system documentation.

Deliverables. The Contractor shall develop and keep updated the necessary requirements and design artifacts to successfully develop and implement the Mason system. These deliverables include, but are not limited to, the following:

- Architectural Vision
- System Traceability Model
- Design and Development Plan
- Process Flow Document(s)

- High Level Design (HLD)
- Solution Detailed Design (SDD)
- Solution Architecture Design (SAD)
- Functional and Technical Design Documents
- Configuration Management Plan
- Business Use Case(s)
- Business Rules Documentation
- User Interface Specification(s)
- Interface Design Documents
- System Security Plan, including security specifications
- Reports and Forms Design Documents
- Process Flow Document(s)
- Glossary of Terms and Acronyms

6.6. Testing

The Contractor shall create the Master Test Plan with Mason input, and shall receive Mason approval before finalizing the plan. At a minimum, the plan shall include the following information:

- Agile Testing Methodology and Automation Approach for the following types of testing expected for Mason:
 - Unit
 - Functional (API/Services)
 - Integration
 - System (includes Web Services, Regression, Security, Browser/Operating System Compatibility and Mobile)
 - Performance
- Relationship to other plans
- Resources - Roles and Responsibilities
- Risks, Assumptions, and Dependencies
- Tools and Test Equipment – including API Testing, Test Management, Automation and Performance and any additional hardware/software
- Test Environment(s) Management - including approach to mocking and service virtualization
- Test Data Management
- UAT Support Approach
- Defect Recording and Resolution
- Test Status/Metric Reporting (e.g., Burndown charts, Velocity, Cumulative Flow, etc.)

Mason will own the Master Test Plan after it is approved. The Contractor shall support all testing activities and execute testing activities assigned to them. This includes but is not limited to the following activities. (Note: Types of testing shall depend on the features in the iteration.)

- Manage test cycles, tracking progress and producing progress and quality reports.
- Conduct the following tests at a minimum before each Phase Implementation: security test, system end-to-end test, conversion test, Operational Readiness Review (ORR), pilot implementation test, and implementation test.
- Develop test scripts in collaboration with Mason. Assist Mason in developing UAT test scripts when requested.

- Support the testing environment including, but not limited to, creating the test datasets, creating de-identified test data sets, and resetting the test data to support the re-running of test scripts.
- Provide defect management tool(s) and procedures for tracking, managing, and reporting system defects during testing.
- Automate testing where possible. Utilize automated testing tools to increase test execution speed and accuracy within the testing phases.
- Train Mason staff involved in testing on the system and test procedures.
- Run validation and testing software against external facing Internet applications to help identify potential security issues and repair any deficiencies found during this testing.
- Support User Acceptance Testing (UAT) when requested. This may include at a minimum:
 - Provide system training to UAT participants.
 - Deploy the relevant iteration functions in the UAT environment.
 - Provide assistance to develop test data and test scenarios.
 - Provide and support the UAT participants' user IDs and passwords.
 - Assist in populating the data in the UAT environment.
- Refine, update, and make available all test documents, procedures, and scripts throughout development and through full system acceptance to reflect the current requirements.

Deliverables. The Contractor shall develop for following testing-related deliverables at a minimum:

- Master Test Plan
- Draft Automated Testing Scripts
- Final Automated Testing Scripts
- Test plans for each testing phase
- Draft Test cases
- Final Test cases
- Completion of all applicable testing cycles
- Draft Security Test Plan report
- Final Security Test Plan report
- UAT Report and Results
- Draft System Integration Test Readiness Checklist
- Final System Integration Test Readiness Checklist

6.7. Data Conversion and Migration

Data Conversion and Migration Plan

The Contractor shall create a Data Conversion and Migration Plan, including:

- Manual and automated cleanup efforts to prepare for data conversion
- Data conversion and migration approach
- Conversion/migration and synchronization strategy
- Archival strategy
- Resource management – staffing, training of Mason staff, facilities
- Interfaces
- Data quality assurance and control
- Conversion and migration risk factors
- Contingency Plan
- Conversion and migration tasks
- Conversion and Migration Schedule (Mock and Go-Live)
- Data security
- Conversion and migration support (hardware, software, tools needed)

- Training of conversion and migration staff

Deliverables. The Contractor shall develop for following data conversion and migration-related deliverables at a minimum:

- Data Conversion and Migration Plan
- Data dictionary, data models, data flow models
- Draft Conversion and Migration Results reports
- Final Conversion and Migration Results reports

6.8. Implementation

System implementation is an effort that coordinates the deployment of software into production, training of users, and readies a support mechanism to address any challenges. The Contractor must demonstrate an awareness of the relationships impacted by this change. Mason expects each implementation effort to be a positive experience that ensures users achieve a high level of knowledge, and competence with Mason. As such, all Contractor staff shall engage in positive and professional interactions with each user group, focused on customer service.

- Implementation Team: The Contractor is expected to plan and execute all aspects of pilots and implementations utilizing an Implementation Team comprised of Contractor and Mason staff. While the Contractor shall have ultimate responsibility, Mason desires a collaborative approach to the effort. The Contractor shall work closely with Mason and the PMO team to ensure communications, training, and on-site support activities are appropriate and in keeping with the tone and vision of the Mason Project. The Contractor shall assess the preparations for the implementations and work towards a seamless transition with all users.
- Pilot: Mason desires a pilot implementation for each Implementation Phase based on the agreed upon project schedule. Mason defines a pilot as a contained assessment, beginning after the training of pilot users, used to validate the systems usability and support processes. The pilots shall be administered by the Contractor. The final selection of pilot users shall be determined by Mason.
- Organizational Readiness: Before implementation commences, the PMO vendor shall perform an Organizational Readiness (OR) assessment reviewing the Contractor's Conversion Plan, OCM Plan, Implementation Plan and Training and On-site Support Plan. Mason's executive management team shall utilize the OR Assessment, any Mason PMO and Mason OR recommendations, and Contractor input to make decisions for both pilot and implementation go/no-go decisions. If Mason chooses to designate an Organizational Readiness (OR) Team to provide guidance and feedback to the Contractor in regards to implementation, the Contractor shall also work closely with the OR Team during implementation.

Implementation Plans

The Contractor shall develop an Implementation Plan for each implementation. The Implementation Plans shall be based on best practices, experience with implementation projects, knowledge of the Mason technology, and user and stakeholder needs. Each Implementation Plan shall include, but is not limited to, the following items:

- Implementation Strategy including pilots
- Plan references
- Relationship to other plans
- Implementation resources – roles and responsibilities

- Implementation communications
- Pilot schedule
- Mason-wide implementation schedule
- Go/no go success criteria
- Technical migration/implementation methods
- Technology, infrastructure, support considerations
- Help desk approach
- Triage/issue escalation processes
- Rollback processes
- Interface contingency plan

Pre-Implementation Activities

The following key activities, as applicable to the functionality being implemented, must be completed and approved prior to initiating each Implementation Phase:

- System Testing/User Acceptance Testing executed (all defects with severity of blocker, critical and high must be fixed)
 - **Blocker:** An item or action that prevents further testing and no work around is possible, is considered a blocking defect.
 - **Critical:** A major functional piece is broken, or issue that affects several areas is considered a critical defect.
 - **High:** A defect that does not function as expected/designed or causes other functionalities to fail to meet the requirements is considered a high defect.
- Mock Conversions (100% successful/zero defects or agreement to address defects either later in implementation or in following implementation)
- Rollback process fully tested
- Disaster Recovery drill executed
- Help Desk support in place
- Training of Implementation Team and affected users executed

Implementation Reporting

The Contractor shall monitor and report the following objectives at a minimum in the Weekly Status Report, as appropriate for each project phase:

- Usability among different stakeholders
- Effectiveness of training
- Unanticipated legacy/document data conditions
- Data conversion
- Post conversion synchronization process
- Planned schedule for implementation
- Organizational readiness
- Stakeholder communication messages
- Technical readiness of implementation location
- Software quality
- No security incidents
- Service disruption and/or system downtime
- Successful interfacing
- Issue escalation process
- Help desk/triage procedures

- User account management
- Participant feedback

Accomplishing these goals successfully helps reduce potential risks and issues prior to Mason wide implementation. The Implementation Team shall measure the above key objectives and report them to the Mason PMO for review.

Implementation Activities

The Contractor shall be responsible for the following tasks, at a minimum:

- Build into the Project Schedule an appropriate amount of time after the pilot concludes and before Mason-wide implementation for adjustments/corrections to software, plans, training, etc.
- Inform Mason of any technical preparation needed for Mason implementation (which may include networking, hardware, or software needs) with adequate advance notice
- Develop all necessary SOPs and Checklists (e.g., Solution Monitoring, and Source Code Migration)
- Conduct a walkthrough of pilot/Mason-wide implementation activities with the Implementation Team
- Conduct a walk-through of pilot/Mason-wide activities that shall occur and review any Standard Operating Procedures (SOP), checklists, etc. that shall be utilized
- Execute the approved activities in the Implementation Plans
- Address system issues during pilot and Mason wide implementation following the published Governance Manual triage process. This includes any system, training, or support issues that arise through all communication channels back to the project. All members of the Implementation Team are to be trained on the triage process.
- After the pilot implementation, review with the Implementation Team the success of the pilot objectives, lessons learned, user readiness, and operational readiness and determine whether to move forward with Mason wide implementation.
- Deliver a Formal System Acceptance Report
- Hold weekly implementation status meetings with Mason that review the weekly reports and address, at a minimum:
 - Pilot/Mason wide implementation status
 - Software defects
 - Communications/OR Team activity integration
 - Training/on-site support process
 - Help desk process
 - Solution monitoring/performance
- Provide Mason with frequent status updates
- Provide system support and address any corrective actions needed throughout each implementation. This shall occur through a frequent triage process facilitated by the Mason PMO that shall track, prioritize, and address the issues found during implementation. The Contractor shall also ensure all applicable Mason environments and artifacts are kept current and in sync throughout implementation.
- Submit all deliverables required to complete the Phase 1 and Phase 2 Implementation milestones. Additionally, at the conclusion of Implementation for each Phase, the Contractor must submit an updated version of all Discovery and Design deliverables denoted with an asterisk (*) next to it in the table in Section xx.

Post-implementation, the Contractor shall deliver a defects log to Mason. The Contractor shall maintain the defects log throughout the Contract term.

7. Organizational Change Management (OCM) and Training

7.1. Organizational Change Management Requirement

While implementing and deploying Salesforce is a large-scale technical implementation effort, the change to a one-org strategy with students at the center is a major organizational change management (OCM) effort. At the center of this program is the development of a comprehensive and holistic OCM strategy that includes change management, marketing and communications, and training. The contractor shall assist Mason in the establishment of an Organizational Change Management (OCM) program to support the Student Lifecycle Transformation and complement the Salesforce implementation. The contractor shall provide expertise and assist Mason's executives, management, staff, and organization in the successful business and cultural transition from the current state of two orgs to the planned future state of one-org.

7.2. Organizational Readiness Assessment

There are a number of sub-cultures and sets of working dynamics that will inform how team members and the Mason community respond to significant organizational change. Some members of the Mason community have worked for Mason for a number of years and offer invaluable institutional knowledge, while other members are newer to the university and offer varied experiences. The goal for the assessment should be to identify minor practical issues or deeply held emotional reactions moving from two-orgs (undergraduate and graduate) to one org. It should also examine the changes moving from two-orgs to one org will have on the undergraduate and graduate student populations. To understand the specific impacts the targeted changes will likely have, the contractor will conduct change readiness assessment. The insights gained from the assessment and feedback will help inform the organizational change management strategy and help to plan and manage for future change activities. Further, the assessment will help with sequencing and prioritization for the organizational change management process and discover points of integration with the technical implementation team.

7.3. Stakeholder Visioning and Touch Point Engagement

Visioning is essential to any organizational change. The process of working with Mason's stakeholders to identify a shared vision for the future is key to driving large-scale change. The contractor will conduct stakeholder visioning sessions to help develop a shared vision and objectives and identify change champions to further the goal and vision of a one org / connected student lifecycle strategy. The contractor will continue touch point engagement with change champions post-visioning to ensure the vision and objectives remain relevant and change champions are armed with information to share with their stakeholders (business units, academic units, students, and alike).

7.4. Stakeholder Identification and Sponsorship Assessment

The key to any successful change management effort requires change leaders throughout the organization to articulate the benefits of the change. Therefore, the contractor will work closely with the Mason team to identify change champions and change agents willing to sponsor and support organizational change. The contractor will conduct an assessment to determine the level of current-state support for the pending changes (or lack of support), as well as each prospective change champions and change agents' current level of sponsorship competency. The outputs of this assessment will inform the change management strategy and overall plan, specifically the support and coaching individual stakeholders will need in order to be fully effective in their role as change leaders. (resistance management plan)

7.5. Change Management Plan

The contractor will develop and implement a Change Management Plan and subplans that address the changes to business processes, academic and administrative units, and technology/application changes occurring as a result of the new system and program, and outline the steps recommended for Mason to prepare the organization for change.

Communications & Stakeholder Engagement Plan: The contractor will build a plan that effectively engages key partners and outlines strategies and tactics to reach desired audiences and move them to required levels of understanding and acceptance of change. The plan will likely address how leadership communicates throughout the duration of the change initiatives, internal communication channels, and the most appropriate messengers to reach targeted audiences successfully.

Sponsor Roadmap: Linked to the Stakeholder Identification and Sponsorship Assessment, the contractor will create a Sponsor Roadmap that demonstrates the primary responsibilities and activities of the primary sponsor(s) whose support is needed throughout the progression of the change process.

Resistance Management: The contractor will conduct analysis of identified change resistance. Resistance does not necessarily mean the change process is flawed or that change in the broader sense is not necessary. Resistance is simply a need for more information. The contractor will design a resistance management strategy that will be customized to barriers identified through the range of assessments previously conducted.

7.6. Marketing and Communications

A common understanding of the Student Lifecycle Transformation effort and the program is key to the successful adoption of Salesforce, new business processes, and the merging of our existing orgs. The contractor will work with Mason to cultivate a common language and communications strategy that represents the values and philosophy of Mason, while also easily articulating the Student Lifecycle Transformation effort. This common language and strategy should be documented in a marketing plan executed through a campaign.

Initiative/Project Name & Strategy: The contractor will work with Mason to name the Student Lifecycle Transformation Program. The contractor will develop strategic language and key messages. As part of this process the contractor will develop an internal document to clarify the initiative's promise and key messages.

Marketing Plan: The contractor will develop a marketing plan that identifies and segments audiences, articulates the marketing strategy for each audience (including a general audience), identifies marketing goals, and ties together campaigns and activities. The marketing plan should include clear dates to show when campaigns, events, and program activities will be delivered, a comprehensive list of communications channels to connect with and engage stakeholders, and high-level work streams that identifies roles and responsibilities for communications under a shared governance model.

Marketing Campaign: The contractor shall create and run a marketing campaign that generates public awareness of the Student Lifecycle Transformation. The campaign should include website

development and maintenance, marketing collateral (key narratives, executive talking points, slide decks, infographics), newsletters, and videos, all segmented by audience.

Focus Groups: The contractor will conduct focus groups with Mason executives, managers, end users, and student representatives to test marketing materials; e.g., slide decks, narratives, and talking points. The contractor will generate focus group results and recommendations and present them to the Salesforce Executive Committee for decision.

Surveys: To complement the focus group efforts, the contractor will use surveys to periodically test marketing materials.

Marketing Materials: The contractor will develop a comprehensive set of marketing materials such a “roadshow” slide deck to explain why we’re making this change and socialize upcoming shifts due to the one-org strategy; infographics to simply explain what Salesforce is; timelines; important milestones; Mason-branded templates; and a video that describes the program and its benefits. All marketing materials will need to be 508-compliant.

Website: The contractor will work with Mason Communications Manager(s) to develop a public facing website that creates public awareness, articulates the program’s progress, provides avenues for engagement and feedback, hosts upcoming and past events, and houses documents and marketing materials for public consumption. The contractor will determine what portion of the site should be available to the general public versus the internal Mason community and develop a set of written SOPs that document website users and update/maintenance processes.

7.7. Training

The Mason training effort is a vital piece to the successful implementation and acceptance of the new system and tools. The Contractor shall provide a high-quality training material for all end users to ensure a smooth transition. The Contractor will be responsible for creating content, using varying media (live, on-line, recorded, webinars, etc.) that best suits each type of user internal and external to Mason. The training delivery schedule will be developed in line with the Agile methodology and releases of Sprints. At the end of each Sprint (or larger Workflow) a training deliverable (workshop, quick reference card, session or guide should be delivered).

The Contractor shall deliver end user training up within agreed upon timeframe after each major rollout phase. The Contractor shall also deliver comprehensive Train-the-Trainer and Super User courses to designated embedded Mason staff from affected Mason Units to enable on-going training after the Mason implementation and completion of the required Contractor-led end user training.

The Contractor must provide a sufficient number of staff to successfully accomplish all of the requirements of the Training Plan. The Contractor training team must have proven experience in the development and delivery of comprehensive training to support organizational transformation as it relates to a transition to a new system. The training group must have robust experience training end users and rolling out new systems, creating and delivering scenario-based train-the-trainer and end user training.

Additionally, the training team must understand Higher Ed Student Lifecycle systems and processes and maintain a high level of professionalism in all interactions with Mason, stakeholders, and Mason Project Team members. The Contractor shall provide a lead resource (DDI Training Lead) to lead the Contractor’s

efforts to develop and execute the Training Plan and serve in a peer management role to the Mason Unit Manager.

The Mason Lead shall provide oversight of the Contractor-led training effort as well as supervising the Mason team. Mason and/or vendor will provide insight, experience, and scheduling/logistic support to the DDI Contractor. They shall also be responsible for review and approval of Mason stakeholder communications and Mason stakeholder engagement. The Contractor shall engage designated Mason staff and staff development early in the process so that the Mason staff can gain expertise in the Mason system's workflow and functionality. The Contractor shall be expected to assist and collaborate with the Mason team on these key tasks at integral points and intersections with the training support effort.

Further details of the Contractor's training responsibilities are provided below.

Contractor Training Plan: The Contractor shall plan and develop a robust training program for all pilot and Mason-wide implementations in collaboration with the Mason team. The DDI Contractor shall create and maintain a detailed Training Plan that must include at a minimum: scope, objectives, schedule, training tools, roles and responsibilities, training environments, approach and methodology, training types, materials, evaluation approach, knowledge transfer approach, and approval criteria.

Materials Development: The Contractor shall be responsible for the curriculum development and materials development for all training courses, and incorporate feedback from the Mason team. After training is complete, all materials must be handed over to Mason in a format that would allow Mason to make edits (e.g., in Word or PowerPoint format rather than secured PDF). Training materials includes the following, at a minimum:

- Training content for all trainings, including supplementary documents such as quick reference cards and exercises to test knowledge retention
- Instructor guides with screenshots for Mason trainers who go through the Train-the-Trainer courses (from the Mason team)
- Leave behind materials
- Materials for a variety of training delivery methods, including classroom training, elearning, and recorded trainings to accommodate end user schedules and limitations
- A comprehensive User Manuals
- Capture and maintain a repository of Frequently Asked Questions
- Survey trainees at the end of every live training session and deliver response data back to Mason to identify gaps/additional needs

Training Delivery: The Contractor shall deliver trainings according to the approved Training Plan. The Contractor will be responsible for just-in-time end user training as the Mason system rolls out. The Contractor shall provide elearning and leverage technology to record on-site training to be reused on demand. The Contractor will be responsible for comprehensive training efforts that must:

- Sufficiently train all designated Mason users (see Appendix 12.4)
- Instill a high level of knowledge about Mason in all materials and exercises
- Ensure consistency among all training staff in delivery of content
- Incorporate exercises for the training and sandbox environments
- Provide instructional guides
- Include an issue-escalation process for issues identified in training sessions
- Provide various scheduling and/or virtual training options as necessary

- Include recording of trainings for future reference and virtual trainings

After the initial training efforts led by the Contractor, the Contractor must work with Mason staff in facilitating an ongoing knowledge transfer to enable a smooth transition, ensuring Mason is capable of taking over all aspects of Mason training. At project closeout, all aspects of the Mason training shall be turned over to Mason.

Mason Train-the-Trainer/Super User training: The Contractor shall conduct the Train-the-Trainer and Super User training according to the approved Training Plan. As part of this, the Contractor shall create a comprehensive Train-the-Trainer and Super User curriculum and training materials that shall prepare the Mason staff to conduct end user training. The Train-the-Trainer preparation must instill a Super User-level of knowledge about Mason as well as with all training materials and exercises that might be used during any classroom trainings. It must ensure consistency among all trainers in presentation and content, incorporate exercises for the training and sandbox environment, provide instructional directions and tips for the trainers, and include practice delivery sessions.

Standalone Mason System Overview Module: The DDI Contractor must provide a Mason System Overview training module that effectively demonstrates Mason features on a high-level and provide Mason users context for all subsequent training. Additionally, the Mason System Overview shall be designed to be used as a stand-alone course for select stakeholders who may be non-Mason users. The Mason System Overview training module will need to be recorded and all content and documents must be available for on-going and future use by Mason use after the system is complete.

Project Training Tools, Technical Environments: The Contractor shall develop separate types of technical environments specifically for training support. This includes training sandbox environments. The training sandbox environments are to be available and used by training staff for preparation of any training materials (e.g., screenshots for guides) as well as for instructional use (e.g., classroom training, end user training).

The training environments shall be utilized by the Contractor and Mason staff for Mason classroom training. One of the training environments shall be used by the Contractor for classroom training and another by Mason in preparing and updating training materials and may be used as an added resource for classroom training. During classroom training, the training environments shall be used to facilitate demonstrations of Mason as well as allow trainees to explore Mason functionality through hands-on exercises. The training environments shall allow multiple training sessions to be conducted concurrently (e.g., four different locations are utilized for classroom training simultaneously during pilot training).

The sandbox environment must be available for trainers to prepare formal training materials and products. It must be available to all users throughout the training effort (as well as post-implementation), allowing users to independently explore all Mason functionality. To facilitate learning, the Contractor shall provide a list of cases available with defined characteristics for trainees to practice through hands-on exercises, which use common scenarios simulating workflow. Additionally, the staff providing on-site support shall utilize the sandbox environment. The sandbox environment shall allow numerous Mason users to access it simultaneously from multiple locations.

The Contractor shall be required to provide sets of data for the training and sandbox environments. The Contractor is required to provide sufficient data to simulate all steps of the varying types of use cases and functionality. The Contractor shall be required to work with the Mason team in the review, selection, and acceptance of sets of data. The Contractor shall be required to develop and follow a process to maintain and update the data in the applicable environments. The Contractor shall be required to develop a schedule and process to maintain the environments as modifications and updates are made to the Mason system.

8. Post Implementation Hypercare

8.1. Knowledge Transfer

A key task that occurs throughout the project is the transfer of system knowledge to Mason staff. This includes hands-on, on-site, face-to-face training. Any COTS or customize software utilized where Mason staff shall be making process, rule, role, or security changes shall also require a final transition of knowledge and training (e.g., BPM, rules engine, IAAM). The Contractor shall ensure that Mason-embedded staff are trained during implementation on how to navigate and complete work in Mason. The Contractor shall have utilized Mason-embedded staff for non-critical path tasks during the Mason Project. Any documentation, such as Standard Operating Procedures (SOPs), Job Aids, checklists, and training materials developed by the Contractor shall be delivered to Mason.

The Contractor shall provide training to Mason staff that shall maintain Mason after transition from the Contractor. This training shall address the following items, at a minimum:

- Database, software, and hardware maintenance
- Application development/batch support
- Architecture design and maintenance
- Security maintenance
- Testing specifications
- User training tools, methods, and materials
- System administration
- Help desk
- Rules engine
- Any SaaS, Commercial Off-The-Shelf (COTS), or customized software utilized where Mason staff shall be making process, rule, role, or security changes (e.g., BPM, rules engine, IAAM).

The last four weeks of each phase shall consist of the Contractor staff shadowing Mason staff. Mason defines shadowing as Mason staff taking the lead on performing tasks with Contractor staff watching over the Mason staff to ensure tasks are completed correctly. The Contractor shall be available to Mason staff for questions.

The Contractor shall create a Knowledge Transfer Plan that includes but is not limited to the following:

- Objectives
- Relationship to other plans
- Schedule
- Approach and methods of knowledge transfer
- Resources
- Knowledge Transfer Risks
- Curriculum, Materials, Set-up
- Relevant communications
- Monitoring, metrics, and evaluation criteria
- Any third-party vendor involvement
- Location of all SOPs, operations manuals for hardware and software products, checklists, etc. that have been written throughout the project.

9. Project Management

9.1. Mason Project Governance and Management

Mason's Project Management approach includes the organizational structure, processes, and tools established to ensure projects are completed in a consistent manner.

The Mason Salesforce Executive Committee (SEC) or SEC's designee will provide the overall project management oversight for Mason. The Contractor must collaborate and take direction from Mason via the Mason PMO. The Mason project will be a coordinated project management effort amongst the Contractor and the Mason team (collectively referred to as the Mason Project Team in this Contract).

The Mason Project will be managed through the Mason Salesforce Executive Committee (SEC) or SEC's designee who has overall daily management authority and will be supported by the Mason PMO, and the business and technical managers. This project management team structure defines roles and responsibilities that will aid the Salesforce Executive Committee (SEC) or SEC's designee to actively monitor the planning, execution, and quality of the project. Mason team members will monitor and participate in contractor activities, and review and approve project deliverables along with team staff.

Mason will have a Change Control Board consisting of the Salesforce Executive Committee (SEC) or SEC's designee and members of the user experience team that will lead the review of all change requests.

Given the magnitude of the project, different Mason stakeholders will be involved at different stages of the project. During the project planning stage, a specific Mason Governance Manual will be created by Mason and Contractor to detail roles, responsibilities, processes, tools, and templates that will be used to execute the project. The Mason Governance Manual will outline which Mason stakeholders will play active roles in helping the Contractor complete milestones.

9.2. PMO Project Governance and Management

It is imperative that the entire Mason Project Team works to ensure a high level of quality across the board, from work packages to deliverables. The Mason PMO will create objectives, standards, practices, and responsibilities for performing project quality management. The Mason PMO will also establish the tools (e.g., checklists) and templates (e.g., delivery expectation document) to conduct quality assessments. The Mason PMO will be responsible for communicating the quality standards and results to the Mason Project Team, Salesforce Executive Committee (SEC) or SEC's designee.

The Mason PMO will work with all Mason Project Team project leads to help facilitate schedule, cost, and quality efforts to ensure a successful outcome. The Mason PMO will maintain the master Project Management Plan for the Mason Project, including a Master Schedule and Risk and Issues and Communications matrices. The Mason PMO will be responsible for the day-to-day management and monitoring of the Mason Project and will monitor that the project processes and tools are being utilized appropriately.

9.3. Overview of Contractor's Project Management Responsibilities

The Contractor is required to follow the Mason Project Governance Structure once the Project Governance Plan is approved for the project. The Contractor's overall project management responsibilities include the following:

- Adhere to all project quality objectives, standards, and practices.
- Lead and manage the DDI portion of the Mason Project using project management practices that will successfully deliver a system that meets Mason's expectations, on time, and within the contract costs.
- Work closely with the Mason Project Team to complete the deliverables and milestones throughout the life of the project.
- Ensure its activities are coordinated and completed according to approved schedules and plans, messages are appropriately given to teams and stakeholders, and DDI risks and issues are escalated and resolved. Communication will be crucial between parties.
- Ensure appropriate fiscal stewardship through effective project management practices and communication, so that all parties can adhere to the various plans and schedules, in order to minimize change control and cost overruns.
- Assist in making work performance measure recommendations that will gauge the Mason Project's health. If contractual work performance measures identify that continual improvement is needed, the Contractor shall assist in the effort to improve performance.
- Keep the staff resources at appropriate levels during the Mason Project. A resource calendar will need to be created as a part of the Project Management Plan and updated throughout the life of the project.

9.4. Project Management Plan

The Contractor shall develop and implement a DDI Project Management Plan (DDI PMP) in alignment with Mason's project management approach and incorporating best practices from previous large IT systems projects. The Contractor will generate and execute a Project Management Plan (DDI PMP) that clearly explains how the DDI scope of activities will be managed. The Contractor must collaborate with the Mason Project Team in the creation of the required DDI PMP components. The DDI PMP will follow the deliverable review and acceptance process as defined in Section 10.5. The Contractor will be expected to respond to any issues or findings identified by the Mason PMO, and will be responsible for regularly submitting and updating individual the DDI PMP and Project Schedule to the Mason PMO.

The DDI PMP should contain (or link to), at a minimum, the following sections:

- a. Project Overview
- b. Project Structure
- c. Project Deliverables
 - Work Breakdown Structure
 - Milestones
 - Baseline Schedule
- d. Resource Management
- e. Vendor Management
- f. Deliverables Management
- g. Requirements Management
- h. Schedule Management
- i. Cost Management
- j. Quality Management

- k. Stakeholder Management
- l. Communications Plan
- m. Progress Monitoring and Reporting
- n. Risk and Issue Management
- o. Project Change Control
- p. Project Closure

As part of the DDI PMP, the Contractor will be required to create a Quality Management Plan detailing an internal quality review process that must describe the Contractor's approach to quality and how the Contractor staff will meet the quality requirements for Mason. This plan will be submitted to the Mason PMO for review and approval.

9.5. Project Schedule

The Project Schedule is a key component to project management. The Contractor must use the experience gained on other IT systems projects to propose a Project Schedule that is reasonable and attainable based on the requirements. The Project Schedule must reflect implementation of a system that addresses all requirements within a maximum three-year timeframe. Once planning commences, the Project Schedule will be refined and baselined and the Contractor will be held accountable to the agreed upon schedule. The schedule will be reviewed consistently to ensure the Contractor is completing the activities, deliverables, and milestones according to plan. The Contractor will keep the DDI Project Schedule accurate, updated daily, and available to the Mason PMO for importing into the Master Schedule.

The DDI Project Schedule will include:

- Fully implemented Mason-wide schedule within a two-year timeframe.
- Work Breakdown Structure (WBS) organized by milestones for all work packages,
- Identified milestones, tasks, task duration, deliverables, dependencies, predecessors, resources (both Mason and Contractor), resource allocation, and start/end dates.
- Clearly identified iteration and release points.
- Clearly identified Mason deliverable review cycles, walk-throughs, demos, etc.

The Project Schedule must be submitted within thirty (30) days of the Contract start date.

9.6. Deliverable Review and Acceptance

The Mason Project requires a concerted planning effort to successfully reach the project goals. The Contractor must submit and receive approval for a Deliverable Expectations Document (DED). Prior to developing any planned deliverables, the Contractor must receive Mason approval of any deliverable's outline, expected content, and format.

The Contractor is expected to ensure all deliverables are submitted complete, error-free, and meet the requirements for the defined deliverable. Any rejected deliverables will require attentive correction. The Contractor should include the following deliverable review times in the proposed Project Schedule unless an alternative review timeline is agreed to in writing.

DDI Deliverable Volume/Length	Deliverable Review and Acceptance Process (Mason Business Days)		
	Mason Initial Review	Mason Review / Apply Feedback	Mason Final Review
Pages and/or Artifact Size 1-100 Pages/Small	5	5	5
Pages and/or Artifact Size 101-250 Pages/Medium	10	5	5
Pages and/or Artifact Size 251+ Pages/Large	15	5	5

Deliverable drafts may require additional drafts prior to the review cycle to ensure content is meeting Mason needs. The Contractor should consider past project experiences when creating the schedule for larger deliverables.

If the Salesforce Executive Committee (SEC) or SEC's designee does not accept a deliverable, the Contractor must revise the deliverable and re-submit it for approval. Payment to the Contractor for completion of a deliverable shall not occur until the deliverable is approved by the Salesforce Executive Committee (SEC) or SEC's designee approver. In addition, the Contractor is subject to reduced payments for deliverables that are not submitted by the respective deliverable's deadline.

9.7. Program Change Management

Integrated Change Management is the process of reviewing all change requests and approving and managing changes to evaluate the impact to time, cost, and quality. Mason will have a Change Control Board consisting of the Salesforce Executive Committee (SEC) or SEC's designee and members of the user experience team. The following change management process shall be followed:

- A request for a system change shall be initiated by a party of the Mason Project Team.
- Mason shall issue a request for a Change Impact Analysis to the Contractor for a proposed change.
- The Contractor shall analyze, size, and provide proposal / cost estimates via the Change Impact Analysis within fifteen (15) days (or such longer period as the Contractor and Mason may mutually agree) following receipt of the request. The Change Impact Analysis will include description and justification of the change, cost impact, schedule impact, staffing impact, expected deliverables, and system security impact.
- The Contractor shall present the Change Impact Analysis to the Mason Project Team and the Change Control Board.
- Once the Change Impact Analysis has been approved for implementation by Mason (including any modifications made during the review process), the Change Impact Analysis shall be deemed an approved Change Request.
- Mason shall clarify priority and impact on existing enhancements and other change requests.
- The Contractor shall implement the change and update impacted project documents.
- The Mason Project Team shall monitor outcomes.

9.8. Meeting and Reports Requirements

Kick Off Meeting. Within ten (10) business days after Contract execution, the Contractor shall schedule an in-person kickoff meeting with key Mason stakeholders, including all members of the Mason Project Team.

During this meeting, the Contractor shall discuss their overall approach to the project and the Mason Project Team will determine timeframes for deliverables that do not yet have a specified deadline, as well as any other outstanding details.

Project Status Reports and Weekly Status Meetings. The Contractor shall provide to the Mason PMO a weekly Project Status Report which, at a minimum, includes updates on tasks (including actual work performed and estimates to complete future work), critical certification challenges, risks, and issues at a glance for executives. The reports must have adequate details throughout the report for the Mason Project Team to understand any actions needed. During the life of the project, the Contractor will meet weekly with the Mason Project Team to review the Project Status Report.

Monthly Executive Report. The Contractor will provide a Monthly Executive Report to Mason's Salesforce Executive Committee (SEC) or SEC's designee, Mason PMO, and Executive Sponsor. This report should be sent to the Salesforce Executive Committee (SEC) or SEC's designee. This will include agreed upon key project metrics such as:

- Project performance standards
- System performance standards
- Work performance standards
- Cost variances
- Schedule variances
- Schedule performance index
- Planned value
- Cost performance index
- Earned value
- Resource allocation

Meeting Attendance. The Contractor shall be available for meetings remotely throughout the duration of the contract. Such meetings may revolve around the overall progress of the project or a specific deliverable. The Contractor staff must further be available for in-person meetings, as required, or remote calls within two (2) business weeks of request.

9.9. Communications

Throughout the Mason Project, communication will be key to ensuring the Mason Project Teams and all affected stakeholders understand the goals of the project, the project status, and expectations for engagement in the project. The Contractor will be required to participate in and provide input for overall project communications. The DDI PMP shall contain a Communications Plan that addresses how the Contractor's project team will communicate internally, with the Mason Project Team members, and beyond to external audiences throughout the life of the project. The Communications Plan shall include, but will not be limited to the following:

- Daily/weekly/monthly communications expectations
- Project Meetings
- Project Escalation
- Project Reporting
- Stakeholder Communications Plan

To ensure all parties are able to fully collaborate, the Contractor must respond to all communication and provide information and assistance within one (1) business day of Mason's request, unless another timeline is agreed upon in writing.

The Contractor will be responsible for ensuring timely updates to the Mason PMO for communications to Mason Executives about the project, and for assisting Mason with communications to other stakeholders.

Stakeholder Communications: Successful implementation is dependent on how well all affected stakeholders are equipped to adopt and adapt to the new environment. Consistent, accurate, timely, and tailored communications is a key component of a successful transition. Mason and the Mason PMO will develop a Mason Stakeholders Communications Matrix that describes roles for overseeing the development and executing all Mason stakeholder communications. Any external Mason communications to Mason vendors need to be approved by the Mason CIO or the CIO's designee.

The Contractor will create the Stakeholder Communications Plan with the Mason Stakeholders Communications Team's input. The objective of the plan is to keep all identified external stakeholders informed of project goals, progress, developments, and general project information. As the project proceeds, the Stakeholder Communications Plan will be updated as needed to meet the changing needs of the project. Execution of the Stakeholder Communications Plan will be coordinated and tracked throughout the life of the project by the Contractor and the Mason PMO.

10. Staffing

10.1. Staffing

The Contractor shall designate qualified staff members with experience in system design, development, and implementation to this Contract. It is preferred that the Contractor's staff have background and experience working with Salesforce Student Success Hub, Admissions Connect, Marketing Cloud (or similar tool) and with Higher Ed institutions. Additionally, it is preferred that the Contractor's staff has experience working with Banner, ETHOS, and Informatica.

The Contractor is responsible for appropriately managing staff and staff resource levels throughout the duration of the Contract. Based on best practices and experience with projects in similar size and scope, the Contractor is to propose an organizational structure and staff that are able to achieve all of the requirements set forth in this Contract.

The Mason Project team will be mostly remote for the duration of this project. Mason reserves the right to request that staff be made available on-site within two weeks' notice, for key project and executive meetings. There will be space provided at this location for a contractually agreed upon number of additional Contractor staff.

Mason reserves the right to remove any Contractor or subcontractor staff member who is deemed unfit. If Mason deems a staff member unfit, the Contractor shall replace the staff member with another staff member who meets Mason's approval within ten (10) business days.

The Contractor shall provide a Project Manager who will be responsible for all aspects of the Contract and ensure it progresses in a timely and efficient manner. The Project Manager will also be responsible for all

deliverables. The Project Manager shall be the main point of contact for Mason and ensure that the Contractor upholds all terms set forth in the Contract.

10.2. Vital Positions

The Contractor must provide the Vital Positions described in the following table for this Contract. NOTE: add language around expected Salesforce experience AND awareness with new functionality in upcoming releases.

Role	Responsibility	Experience
Project Executive/ Director	Directs project oversight, liaises with Mason and various other Mason stakeholders, and addresses escalated issues.	<ul style="list-style-type: none"> 5+ years of experience in IT project management of large-scale Higher Ed system implementation projects
Project Manager	Provides daily oversight of the project. Works with the Mason Project Team to ensure successful project outcomes. Ensures Contractor project team staff performance using an Agile software development methodology. Develops and manages the DDI PMP.	<ul style="list-style-type: none"> 10+ years of experience in IT project management of large-scale system implementation projects. Experience with agile development methodologies. PMP, SCRUM Master preferred
Functional Lead	Participates in Requirements Confirmation and ensures the Contractor's staff comprehends functional requirements. Ensures traceability of all functional requirements for the Mason system throughout the life of the project.	<ul style="list-style-type: none"> 5+ years of experience managing functional teams in Higher Ed <p>OR</p> <ul style="list-style-type: none"> 3+ years of experience managing functional teams for large-scale system implementation projects.
Technical Lead	Participates in Requirements Confirmation and ensures the Contractor's staff comprehends technical requirements. Develops and tracks the Design and Development Plan and Configuration Management Plan, including development, unit test, and integration of the software build. Utilizes a user experience approach to design. Ensures timely delivery of development and unit testing activities.	<ul style="list-style-type: none"> 5+ years of increasing/progressive levels of experience managing technical teams for large-scale system implementation projects using agile development methodologies. Experience with Higher Ed system implementation projects or industry-leading certification preferred. Versed in continuous integration (CI) and continuous delivery (CD) methods.
Infrastructure Lead	Develops and tracks Business Continuity and Disaster Recovery Plan, and Maintenance & Operations Plan. Administers and documents the lifecycle of equipment including deployment, maintenance, and scheduled upgrades. Enforces the established hardware and software standards.	<ul style="list-style-type: none"> 5+ years of experience managing infrastructure teams for large-scale system implementation projects.
Implementation Lead	Develops and tracks the Phase Implementation Plans and oversees the implementation timelines, OCM Plan, Training Plan, Knowledge Transfer Plan, and all implementation activities and deliverables for the Mason system. Creates a help desk team to help address Mason user questions or issues.	<ul style="list-style-type: none"> 5+ years of experience managing functional teams in Higher Ed 3+ years of experience managing functional teams for large-scale system implementation projects.

Role	Responsibility	Experience
Training/On-site Support Lead	Develops the initial train-the-trainer and super user training. Leads training of all end users. Acts as a consultant to Mason for all ongoing training and on-site support efforts.	<ul style="list-style-type: none"> 5+ years of experience managing training and on-site support efforts for Higher Ed systems, as well as large scale system implementation projects
Organizational Change Management Lead	Develops the OCM Plan. Works with Mason to assist in the execution of the OCM Plan and the transformation of the organization via the Mason system.	<ul style="list-style-type: none"> 5+ years of experience leading OCM efforts in large scale system implementation projects. Deep understanding of OCM methodologies and application in disparate organizations Certified ADKAR Prosci preferred
Communications & Marketing Lead	Develops and manages the program's communications and marketing strategy.	<ul style="list-style-type: none"> 5+ years of experience developing and leading marketing and communications efforts Experience developing and implementing communications strategies and public awareness campaigns Experience utilizing email marketing software and website content management tools like WordPress and Drupal
Data and Conversion Lead	Develops and tracks the Data Conversion and Migration Plan and the Conversion and the Conversion and Migration Results reports. Manages the data dictionary, data models, and data flow models. Leads and performs all data conversion, migration, synchronization, and cleanup related duties associated with the Mason system. Works with Mason to develop the archival strategy.	<ul style="list-style-type: none"> 5+ years of experience in design, development, and administration of complex databases as well as lead roles in multiple complex database conversions. Extensive experience with advanced SQL scripting, and proficiency with LINUX command line and shell scripting required.
Testing Lead	Develops and tracks the Master Test Plan including support for UAT. Manages ongoing testing activities. Collaborates with leads to implement an effective testing process including creating test infrastructure that supports continuous integration and automated testing.	<ul style="list-style-type: none"> 3+ years of experience in system testing and defect management for large-scale system implementation projects, preferably using an agile approach. Versed in continuous integration (CI) and continuous delivery (CD) methods.

Role	Responsibility	Experience
Integration/ Interoperability Lead	Ensures all integration points within the Mason system are managed and perform successfully. Works with Mason and the Contractor's staff to investigate any inconsistencies of integration or inoperability as it pertains to the overall platform, including the legacy system. Establishes and satisfies information assurance and security requirements based upon the analysis of user, policy, regulatory, and resource demands. Understands interoperability standards, defines security requirements, identifies technical problems, and provides engineering and technical support in solving these problems. Provides support at the highest levels in the development and implementation of doctrine and policies. Ensures that all information system components are functional and secure.	<ul style="list-style-type: none"> • 5+ years of increasing/progressive levels of responsibility leading integration and interoperability development in large-scale system implementation projects. • Experience with Higher Ed system implementation projects and/or industry leading certification preferred.
Chief Architect	Develops and tracks the Architectural Vision and Solution Architecture Design. Establishes Enterprise Architecture (EA) standards and processes and ensures the delivery of the target architecture.	<ul style="list-style-type: none"> • 5+ years of increasing/progressive levels of responsibility architecting large scale system implementation projects. • Experience with Higher Ed system implementation projects and/or industry leading certification preferred.
Security Lead	Ensures the Contractor's staff comprehends security requirements. Develops and tracks the System Security Plan. Contributes to the Business Continuity and Disaster Recovery Plan, the Design and Development Plan, the Data Conversion and Migration Plan, and the Master Test Plan. The Security Lead must ensure the following: <ul style="list-style-type: none"> • Compliance with federal requirements, policies, and procedures regarding privacy • Protection of confidential data and information • Security testing during development and resolution of any findings • Security is architected directly into the application and features 	<ul style="list-style-type: none"> • 5+ years of experience in integrating security standards and features within complex systems containing confidential information. • Experience with System Assessment and Authorization (SA&A) or CISSP, CISM, or equivalent certification preferred.

The Contractor must provide Mason with written notification of anticipated vacancies of Vital Positions within two (2) business days of receiving the individual's resignation notice, the Contractor's notice to terminate an individual, or the position otherwise becoming vacant. **Vacated Vital Positions must be refilled within 30 days of notice (of the vacancy) with a person who has the same or higher qualifications and experience.**

Prior to the hiring or re-assigning of any Contractor or subcontractor staff member to a Vital Position, the Contractor must provide Mason with the job description of the particular Vital Position and the employee's background, biography, and qualifications to justify the employee's hiring or reassignment and to allow Mason an opportunity to provide its thoughts, concerns, and/or suggestions for Contractor's consideration. Replacements for Vital Positions shall have qualifications that meet or exceed those specified in the above table.

10.3. Additional Staffing Requirements

- The Contractor is responsible for keeping the staff resources at appropriate levels throughout the duration of the Contract. A resource calendar will need to be created as a part of the DDI PMP and updated throughout the life of the project.
- In addition to the Vital Positions listed above, the Contractor must also provide additional staff members to assist the team in providing quality service to Mason. These staff positions shall be proposed by the Contractor and approved by Mason. The resources assigned to these roles must have the skills and experience required to build and implement a system of this scope and meet the needs outlined in the Contract.
- The Contractor's staff will be required to adhere to professionalism expectations in all interactions with Mason. The Contractor's staff must comply with all written Mason policies, including those related to confidentiality and security. The Contractor will be required to complete all necessary background checks according to federal policies and guidelines (e.g., IRS Publication 1075). On-site Contractor staff may use Mason facilities, furnishings, and supplies only for work to be performed for the Mason Project.
- The Contractor must identify, report, and resolve performance issues for its entire staff, including but not limited to the Contractor's staff members and subcontractors staff members.

11. Appendix

11.1. Lifecycle/Undergrad Admission Org

Storage & Usage	<ul style="list-style-type: none"> Full Sandbox 1 Partial Sandbox Unlimited Edition 79% Data Utilization 18% File Utilization 94% License Utilization (Full SF) 44 % License Utilization (Platform SF) 	<ul style="list-style-type: none"> 21 % - Email Messages 13 % - Couse Connections 11 % - Leads 7 % Checklist 5 % Email Broadcast Members 4 % Mason Financial Aid 4 % Accounts (Some Users overlap between two Orgs)
Apps & Objects	<ul style="list-style-type: none"> 18 Apps 71 Tabs 61 Installed Packages, 32 Managed Package, 56 Custom Objects (Excluding Managed Packages), 365 (Including Managed Package) 	<ul style="list-style-type: none"> TargetX, Object Dictionary Salesforce, Salesforce Labs, Agile Accelerator, TimeWarp, EDA SMS w/ Mogli Elements.Cloud FormAssembly Informatica Cloud CTI – Vonage (Snowytree) OwnBackup, Archive
Security	<ul style="list-style-type: none"> 36 Profiles (20 Custom) 162 Permission Sets (134 Custom) 9 Admins / 140 Full License Users / 100 PT/Wage full licenses / 53 Platform license Users/ 67,532 Community Users 	<ul style="list-style-type: none"> Some Users are in both Orgs
Reports & Automation	<ul style="list-style-type: none"> 43 Workflow Rules (Active) 14 Process Builders (Active) 44 Flows (Active) 97 Validation Rules (52 Managed Package) 9483 Reports 	
Custom Code	<ul style="list-style-type: none"> UG Production (00D41000001PdGJ) Instance: NA75 MyDomain: Mason 73 Visualforce Pages Unmanaged(total 562) 26 Apex Triggers Unmanaged (Total 208) 86 Apex Classes Unmanaged (Total 3261) 7 Apex Components Unmanaged(total 158) 	

11.2. Graduate Admission Org

Storage & Usage	<ul style="list-style-type: none"> Full Sandbox Unlimited Edition 31 % Data Utilization 28 % File Utilization 91 % License Utilization (Full SF) 99 % License Utilization (Platform SF) 	<ul style="list-style-type: none"> 19 % - Email Messages 13 % - Broadcasts 10 % Email Broadcast Members 8 % - Addresses 8 % Tasks 5 % Checklist 4 % Application Reviews 4 % Contacts 4 % Recommendations (Some Data overlapped between two Orgs)
Apps & Objects	<ul style="list-style-type: none"> 13 Apps 34 Tabs 40 Installed Packages , 20 Managed Package, 13 Custom Objects (Excluding Managed Package), 190 (Including Managed Package) 	<ul style="list-style-type: none"> TargetX, Object Dictionary Salesforce, EDA SMS w/ Mogli Elements.Cloud FormAssembly Informatica Cloud OwnBackup, Archive
Security	<ul style="list-style-type: none"> 32 Profiles (18 Custom) 109 Permission Sets (83 Custom) 	<ul style="list-style-type: none"> Some users are in both Orgs



	<ul style="list-style-type: none"> 5 Admins / 110 Full License Users / 814 Platform license Users/49,654 Community Users 	
Reports & Automation	<ul style="list-style-type: none"> 52 Workflow Rules (Active) 10 Process Builders (Active) 35 Flows (Active) 100 Validation Rules (52 Unmanaged Package) 8571 Reports 	
Custom Code	<ul style="list-style-type: none"> GR Production (00D1I000003nR75) MyDomain: MasonGrad54 Visualforce Pages Unmanaged(total 300) 25 Apex Triggers Unmanaged (Total 119) 86 Apex Classes Unmanaged (Total 1980) 31 Apex Components Unmanaged (total 59) 	

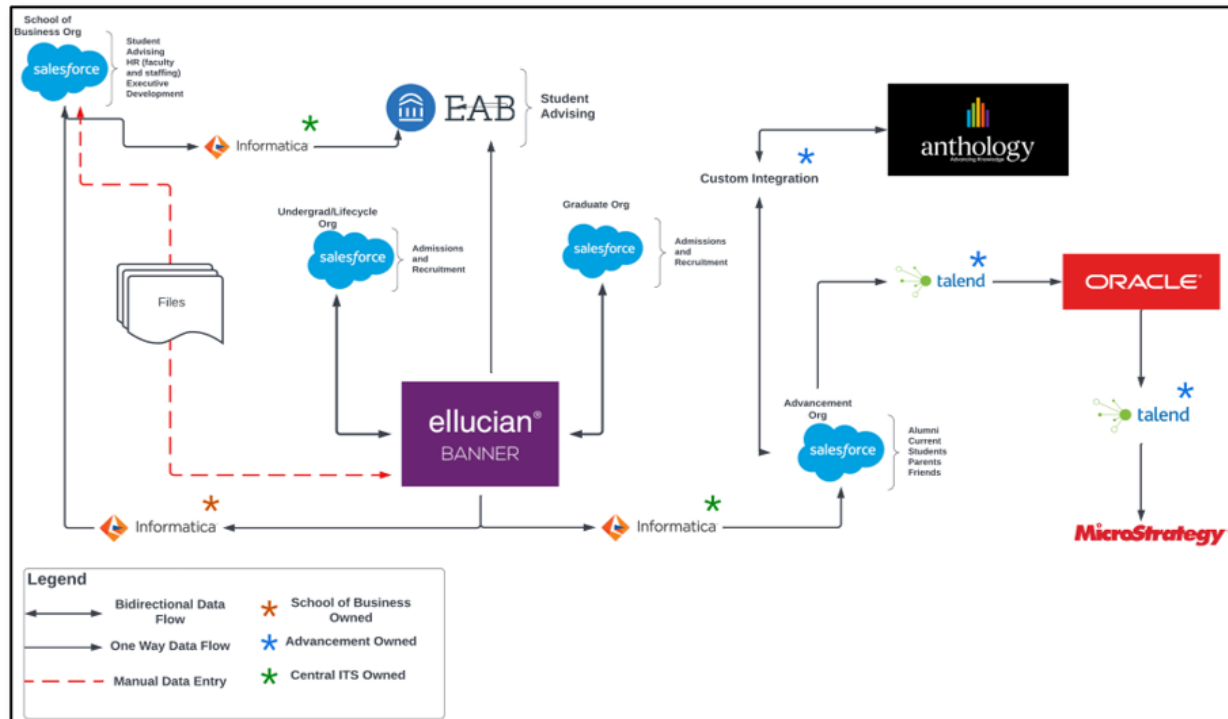
11.3. Business School Org

Storage & Usage	Full Sandbox <ul style="list-style-type: none"> Enterprise Edition 71% Data Utilization 6% File Utilization 100% License Utilization (Full SF) 	MyDomain: MasonBus <ul style="list-style-type: none"> 52 % - Individual Email Results (Fluctuates based on archiving - detailed info packets that are returned from Marketing Cloud) 11 % - Email Messages 8 % - Tasks 6 % Cases 3 % List Email Sent Results 2 % EACH - Accounts, Contacts, Affiliations 1 % Addresses (Some Data overlapped between two Orgs)
Apps & Objects	<ul style="list-style-type: none"> 71 Apps (Many Phased Out & More to Phase Out Soon) 91 Tabs (Will be reduced) 30 Packages (3 active managed packages from 3rd parties) 	Marketing Cloud <ul style="list-style-type: none"> Packages Being used and need maintenance Validity Tool Suite (DemandTools, BrightVerify, GridBuddy --> ToolsSuite) 1 Form Assembly 1 Declarative Lookup Rollup Summary
Security	<ul style="list-style-type: none"> 15 Active Profiles (14 Active Custom) 73 Permission Sets (62 Custom) 1 Admins / 66 Full Licensed Users SBUS and GRAD Org have cross over users 	
Reports & Automation	<ul style="list-style-type: none"> 80 Active Workflow Rules 24 Process Builders (Active) 44 Flows (Active) 50 Validation Rules 894 Reports 	
Custom Code	SBUS Production <ul style="list-style-type: none"> 10 Visualforce Pages (rough number) 95 Apex Triggers (73 Managed) 1757 Apex Classes 41 Apex Components 	

11.4. System Inventory

System Name	Purpose	Unit	Users	SF Managed Package (Y/N)	Application Type (Cloud, On-Premise)	Vendor or Homegrown	Contract Type (Annual, etc.)	# of Licenses
Rave Alert System	Emergency Communications			N	On-Premise	Vendor		
Listservs	Internal Email Communications			N				
Elements Cloud				Y	Cloud	Vendor	Annual	13 (10 Editors, 2 Connection, 1 Enterprise)
TargetX – Lifecycle/UG	Recruitment and Admissions	Enrollment Management		Y	Cloud	Vendor	Five-Year	98
TargetX – GR/Graduate								76
Mogli - Lifecycle/UG	SMS Messaging	Enrollment Management		Y	Cloud	Vendor	Three-Year	
Mogli – GR/Graduate							Annual	
TeamDynamix	ITSM Support tickets			N	Cloud	Vendor		
Microstrategy Datamart	Integration	IT		N	Cloud	Vendor		
Tableau	Data Visualization			N		Vendor		
Informatica Cloud	Integration			N	Cloud	Vendor		
Stellie (replaces DegreeWorks)	Degree management	Registrar's Office		N	Cloud	Vendor		
FormAssembly	RFIs; Events, Orientation			Y	Cloud	Vendor	Five-Year	4
EAB Navigate	Student Success Management			N	Cloud	Vendor		
Ellucian Banner	Student Information System			N	Cloud	Vendor		
Symplicity				N	Cloud	Vendor		
HelioCampus	Business Intelligence			N	Cloud	Vendor		
Salesforce Agile Accelerator	Work Item			Y	Cloud	Vendor		
Salesforce Shield	Security			Y	Cloud	Vendor		
Salesforce Knowledge	FAQ Repository	Enrollment Management		Y	Cloud	Vendor		
Anthology Blackboard	Learning Management System							
DemandTools	Duplicate management							

11.5. Mason System Landscape



11.6. Current Undergraduate Student Success Technology Solution (Navigate)

- Appointment scheduling
 - Integrates with Office365 calendars
 - One on one, group appointments, study hall, drop-in appointments
 - Student-scheduled appointments and appointments scheduled on behalf of students by staff members
 - Appointment requests
- Appointment center visible by front desk staff
 - Check students in to appointments, schedule appointments based on student and staff availability
- Kiosk function for self-check-in
- Customizable services offered to students with the ability to limit based on SIS categories and student major
- Appointment summaries with customizable view setting based on need
 - Customizable meeting types to tag onto summaries for reporting
- Note taking
 - Notes visible to other staff members and private notes visible to self-only
 - Customizable note reasons to tag onto notes for reporting
 - Note templates for different appointment types
- Customizable tags to add on to student profiles
 - Example: Orientation dates, names of HRL Learning Communities
- Direct communication to students via email and SMS
- Mass communication campaigns to groups of students, both actionable and informational
- Reporting and analytics on appointments and other success metrics

- Ability to save and automate reports
- Advanced search function (with multiple fields to find a particular group of students) and quick search function (search by name, G#, email address).
 - Ability to save search fields to run search again with the same fields
- Student lists
 - Saved student lists that can be created via advanced search, reports, and manual upload
- Customizable roles and permission sets for users based on function,
 - Security based on data access needed by staff type (Assigned advisors, coaches, RAs, etc)
- Assigned student caseloads
 - Customizable relationship names visible to students based on staff role
 - Success coach, ADVANCE success coach, RA, etc
- Customizable success markers
 - Based on major (ex: students less likely to complete degree if they receive a B- or lower in Biology 101).
- Alerts and case management, such as academic warning and other at-risk factors/success markers, for staff to intervene on.
 - Manual alerts issued by staff for customizable reasons
 - Automatic alerts based on student behavior (example a student has more than one withdrawal in a semester)
- Bulk upload of list of students to add tags or send alerts.
- Private and separate data views based on security needs
 - Student Health Services, Academic Integrity & Student Conduct, Identity Resources (such as Undocumented Students, LGBTQ+ Resources), Academic Administrators
- Bi-directional integration with Microsoft Office 365 Calendars and Email
 - Ability to email students from within Application and/or cc application and have emails recorded as notes
- Student information views, customized for students, advisors, coaches, and others;
 - includes: directory information, GPA, credits completed, academic majors and minors (and major changes), holds and alerts, transfer information, earned degrees, catalog year, registration dates;
 - includes or embeds transcript, transfer audit, degree audit (DegreeWorks/Stellic), degree and semester planning tools
- In-application guidance for standard tasks (i.e., self-service support for users)
 - Help Center
- Dynamic analytics dashboards including:
 - Activity analytics: Track student and staff activity.
 - Population Health Analytics Identify intervention opportunities using key academic performance metrics, view effectiveness of interventions.
- Historical Trend Analytics: Identify opportunities and evaluate success using historical analysis at the institution and program level.

11.7. Mason Navigate User Totals by Role

All Roles	
Student	191,475
Professor	3,867
Advisor	267
EAB Administrator	128
Location Administrator	32
Prospective Student	12
Advanced Analytics	8
Athletics Coordinator / Tutor	7
Contemporary Student Services (Pro Staff)	3
HRL - Community Director	10
Identity Resource Professional Staff	1
Kiosk Only	2
Learning Services: Tutoring Administrator	3
Restricted Advisor	8
Student Conduct & Academic Integrity	5
Student Front Desk	8
Student Health Services	1
Student Support and Advocacy	3
Success Coach	15
UL Pro-Staff	12
TOTAL	195,867

11.8. Mason Constituent List

Academic / Administrative Departments
Enrollment and Admissions
Financial Aid
Information Technology Services
Pathways & Community College Relationships
Student Services
Mason Korea
University Life
Graduate Education (Including Academic Units)
Graduate Admissions
Undergraduate Education (Including Academic Units)
Athletics

11.9. Mason Strategic Salesforce Use Cases: Current Capability

The following table illustrates the understanding of each orgs current capabilities; however, robust requirements confirmation and gathering sessions should be conducted. Importantly, the capabilities listed under Graduate Education are based on a superficial scan and are provided with less certainty than other use cases.

Current Salesforce Org	Lifecycle/ UG ORG							SBUS Org and GR/ Grad Org	GR/ Grad Org		
Current SSH/Software						Navigate	Navigate	Navigate		Navigate	Navigate
Use Case	Enrollment and Admissions	Financial Aid	Information Technology Services	Pathways & Community College Relationships	Student Services	Mason Korea	University Life	Graduate Education	Graduate Admissions	Undergraduate Education (Including Academic Units)	Athletics
Admissions marketing through the platform	X								X		
Application build through the platform	X								X		
Application review through the platform	X		X						X		
Application submission through the platform	X								X		
Appointment check-ins through the platform	X				X		X			X	X
Baseline Salesforce object encryption through the platform	X	X	X	X	X	X	X	X	X		
Build communications plans through the platform	X				X		X	X	X		
Building campaigns through the platform	X			X		X	X	X	X	X	X
Building forms through FormAssembly	X	X		X	X	X	X		X		
Case management through the platform	X	X		X	X		X	X	X		
Communications (Email, SMS) through the platform, 1:1	X	X		X	X	X	X	X	X	X	X
Conference Management (Apply, Admit, Enroll, full cycle management)	X										
Create, Build, Manage TargetX Events (Recruitment, Admit, Yield, Melt) through the platform	X			X	X	X	X		X		
Creating, Edit, Manage dashboards through the platform	X	X		X	X	X	X	X			

Current Salesforce Org	Lifecycle/ UG ORG							SBUS Org and GR/ Grad Org	GR/ Grad Org		
Current SSH/Software						Navigate	Navigate	Navigate		Navigate	Navigate
Use Case	Enrollment and Admissions	Financial Aid	Information Technology Services	Pathways & Community College Relationships	Student Services	Mason Korea	University Life	Graduate Education	Graduate Admissions	Undergraduate Education (Including Academic Units)	Athletics
Customization in admissions processes	X								X		
Decision portal through the platform	X								X		
Document management through the platform	X			X					X		
Integration: Banner feeding system	X	X	X	X	X	X	X	X	X	X	X
Integration: CommonApp	X										
Integration: NOVA Student	X										
Integration: System feeds Banner	X										
Integration: System feeds Data Mart							X				
Lead/Prospect generation through the platform	X								X		
Leveraging lead conversion capabilities	X								X		
Make configuration/customization	X		X				X				
Managing notes related to student/staff appointments				X		X	X	X		X	X
Managing the scholarship presentation through the platform	X								X		
Mass Communications (Email, SMS) through the platform	X	X	X	X	X	X	X	X	X	X	X
Monitoring communications performance	X			X		X	X	X	X	X	X
Platform Event Reporting (Splunk)			X								
Producing reports through the platform							X	X		X	X
Report on student athlete study hall hours											X
Reporting through the platform	X	X		X	X	X	X	X	X	X	X
Send athletics travel letters to faculty											X
Student Event registration through FormAssembly	X						X				

Current Salesforce Org	Lifecycle/ UG ORG							SBUS Org and GR/ Grad Org	GR/ Grad Org		
Current SSH/Software						Navigate	Navigate	Navigate		Navigate	Navigate
Use Case	Enrollment and Admissions	Financial Aid	Information Technology Services	Pathways & Community College Relationships	Student Services	Mason Korea	University Life	Graduate Education	Graduate Admissions	Undergraduate Education (Including Academic Units)	Athletics
Student Staff Appointment Scheduling (Office365, Navigate)	X	X		X	X	X	X	X		X	X
Student/Athletic Progress reports						X					X
Supporting Student Research Activities										X	
Task management through the platform	X	X		X			X				
Track student athlete study hall hours											X
User support through the platform (FAQ/Knowledge/Help Center)	X	X		X	X	X	X	X	X	X	X

11.10. Mason Strategic Salesforce Use Cases: Potential Expected Future State Capabilities

The table below is an example of what future state capabilities are of interest. It is neither exhaustive nor complete. This future state outlay is based on feedback from a limited number of stakeholders and is subject to change based on discovery.

Use Case	Enrollment Management	Financial Aid	Information Technology Services	Mason Korea	Office of Institutional Effectiveness & Planning	Pathways & Community College Relationships	Student Services	Undergraduate Education (including Academic Units)	Graduate Education	University Life	Athletics
Access and share clean data	X	X	X	X	X	X	X	X	X	X	X
Analyze student engagement levels with communications channels								X	X	X	
Appointment booking through the platform	X							X	X	X	
Automate a referral system				X				X	X	X	
Automate admissions decisions across units	X										
Automate and integrate workflows with other enterprise systems									X		
Automate application review processes	X										
Automate business processes	X								X	X	
Automate case management notifications to students				X			X	X	X	X	
Automate communications sent to students	X			X		X	X	X	X	X	X
Automate recruiting activities (e.g., assigning leads/inquiries)	X								X		
Build a 360-degree view of students	X	X	X	X		X	X	X	X	X	X
Build and manage dashboards through the platform	X								X	X	
Build custom forms for students	X							X	X	X	
Build emails through the platform	X			X				X	X	X	X
Case management through the platform				X		X		X	X	X	
Case management tracking through the platform		X		X				X	X	X	
Custom object encryption through the platform			X								
Customize and target constituent communications								X	X	X	
Customize constituent communications	X							X	X	X	
Customize forms for students	X						X	X	X	X	
Data extraction through the platform		X						X	X	X	X
Enhanced case management functionalities							X	X	X	X	
Enter and share notes on student information				X		X	X	X	X	X	
Event management and communications through the platform				X					X	X	
Forms creation through the platform								X	X	X	

Use Case	Enrollment Management	Financial Aid	Information Technology Services	Mason Korea	Office of Institutional Effectiveness & Planning	Pathways & Community College Relationships	Student Services	Undergraduate Education (including Academic Units)	Graduate Education	University Life	Athletics
Integrate a Continuous Integration/Continuous Delivery Tool with Salesforce	X		X					X	X	X	
Integrate case management systems across units				X				X	X	X	
Integrate Salesforce with an automated prioritization tool	X								X		
Integrate Salesforce with Tableau	X								X		
Integrate Salesforce with the Common App	X								X		
Interactive and targeted campaign building through the platform	X							X	X	X	X
Lead conversion through the platform	X								X		
Lead scoring through the platform	X								X		
Leverage a one-stop shop					X				X		
Leverage a student portal for case management				X			X	X	X	X	
Leverage academic planner functionality						X		X	X		
Leverage advanced appointment scheduling functionality				X				X	X	X	X
Leverage advanced communications capabilities	X							X	X	X	X
Leverage advanced reporting capabilities	X			X		X		X	X	X	X
Leverage an integrate an enterprise admissions tool	X								X		
Leverage an integrate an enterprise email communications tool	X							X	X	X	X
Leverage and integrate forms tool with Salesforce	X							X	X	X	
Leverage calendar functionality	X			X				X	X	X	X
Leverage consistent data model across the institution	X		X					X	X	X	
Leverage consistent integration model across the institution			X					X	X	X	
Leverage dashboards in case management reporting	X							X	X	X	
Leverage data backup and recovery capabilities	X		X								
Leverage data integrity restraints			X								
Leverage email building capabilities	X			X				X	X	X	X
Leverage enterprise marketing tool	X		X						X		
Leverage forms through the platform						X		X	X	X	
Leverage improved security model			X								

Use Case	Enrollment Management	Financial Aid	Information Technology Services	Mason Korea	Office of Institutional Effectiveness & Planning	Pathways & Community College Relationships	Student Services	Undergraduate Education (including Academic Units)	Graduate Education	University Life	Athletics
Provide greater targeting capabilities in student communications								X	X	X	
Provide integration with Mason360									X	X	
Provide interface between Lifecycle and Graduate Orgs	X								X		
Provide interface between Salesforce and Advance Career Accelerator Toolkit						X			X	X	
Provide live chat functionalities							X			X	
Provide live chat functionality	X	X						?		X	
Provide mobile-friendly capabilities for students				X				X	X	X	X
Provide point and click functionality									X	X	
Provide real-time integration between Salesforce and Banner			X	X	X			X	X	X	X
Provide real-time integrations between Mason and NOVA systems						X		X	X	X	
Provide real-time integrations between Salesforce and other enterprise systems						X			X		
Provide real-time integrations with Salesforce and other enterprise tools	X	X	X				X		X	X	
Provide single application review process for Graduate and Undergraduate instances			X								
Provide staff and faculty with greater visibility into student access	X							X	X	X	
Provide student self-service							X	X	X	X	
Provide user-friendly functionality	X							X	X	X	
Provide users with access to a centralized data source								X	X	X	
Provide visibility for students into case management	X							?	X		
Report on email communications	X							X	X	X	X
Report on marketing efforts	X								X	X	
Seamlessly build applications through the platform	X								X		
Segment communications data									X	X	
Share data between Orgs	X								X		
Simplify case management through the platform											
Simplify workflows	X								X		
Standardize Salesforce use across the institution	X								X		
Targeted and personalized communications through the platform								X	X	X	

accenture



George Mason University

Student Lifecycle Transformation

GMU-1859-23 | April 28, 2023

Submitted to:

George Mason University

Grace Lymas, Assistant Director

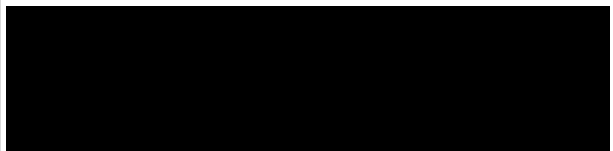
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Submitted by:

Accenture LLP





Redaction Summary Page

(a) the information to be protected	(b) the section(s)/page number(s) where this information is found in the proposal	(c) statement why protection is necessary
Administrative		
Name of Managing Director	Cover Page / page 1	The redacted material contains personal information concerning identifiable individuals.
Signature and name of Managing Director	Cover Letter / page 5	The redacted material contains personal information concerning identifiable individuals.
1. Procedural Information		
Signature and name of Managing Director	Cover Page / page 7	The redacted material contains personal information concerning identifiable individuals.
2. Executive Summary		
Vital Roles Name and Pictures	Executive Summary / page 11	The redacted material contains personal information concerning identifiable individuals.
3. Qualifications and Experience		
Client Information	Accenture in Virginia / page 14	The redacted material pertains to our confidential client information.
Client Information	Accenture Education Practice Overview / page 15	The redacted material pertains to our confidential client information.
Client Information	Salesforce meets the Needs of Higher Education / page 21	The redacted material pertains to confidential Salesforce client information.
Vital Roles, Additional Staffing, Advisory Group	Qualifications / page 24 - 54	The redacted material contains personal information concerning identifiable individuals.
References	References / page 55 – 60	The redacted material pertains to our confidential client information.
4. Specific Plans		
Mason's Future Salesforce COE	Salesforce COE / page 65	The redacted material is proprietary information related to our proposed solution.
Name and picture of Security Lead	Security / page 67	The redacted material contains personal information concerning identifiable individuals.
Team Organization Chart	Decentralized Central Model / page 69	The redacted material is proprietary information related to our proposed solution.
Hybrid Agile Methodology	Agile Development Methodology with Work Intake and Prioritization / page 73	The redacted material is proprietary information related to our proposed solution.

(a) the information to be protected	(b) the section(s)/page number(s) where this information is found in the proposal	(c) statement why protection is necessary
Timeline	b. Services Implementation / page 77, 79, 80, 81, 84, 85	The redacted material is proprietary information related to our proposed solution.
How we deliver SDLC services table	Masons Project Goals and Requirements table/ page 88- 89	The redacted material is proprietary information related to our proposed solution.
Name and picture of Functional Lead	Requirements Management / page 93	The redacted material contains personal information concerning identifiable individuals.
How we deliver design and development execution table	Design and Development Execution table/ page 100	The redacted material is proprietary information related to our proposed solution.
Name and picture of Testing Lead	Testing / page 102	The redacted material contains personal information concerning identifiable individuals.
Testing cycles table	Testing activities / page 104-105	The redacted material is proprietary information related to our proposed solution.
Testing Environment Image	Test Environment / page 106	The redacted material is proprietary information related to our proposed solution.
UAT execution responsibilities table	UAT execution / page 109- 110	The redacted material is proprietary information related to our proposed solution.
Name and picture of the Data and Conversion Lead	Requirements Management / page 112	The redacted material contains personal information concerning identifiable individuals
How we deliver implementation services	Implementation Team / page 116	The redacted material is proprietary information related to our proposed solution.
How we deliver pre-implementation activities table	Pre-implementation activities / page 118 - 119	The redacted material is proprietary information related to our proposed solution.
How we deliver implementation activities table	Implementation activities / page 120 – 121	The redacted material is proprietary information related to our proposed solution.
Name and picture of the Organization Change Management Lead	Organizational Change Management and Training / page 123	The redacted material contains personal information concerning identifiable individuals.
Change Management activities	Organizational Change Management and Training / page 124	The redacted material is proprietary information related to our proposed solution.
Change Readiness Assessment table	Change Readiness Assessment / page 128	The redacted material is proprietary information related to our proposed solution.
Resistance Management image	Resistance Management / page 135	The redacted material is proprietary information related to our proposed solution.
Marketing and Communications image	Marketing and Communications / page 138	The redacted material is proprietary information related to our proposed solution.
Marketing and Communication efforts image	Marketing and Communications / page 138	The redacted material is proprietary information related to our proposed solution.

(a) the information to be protected	(b) the section(s)/page number(s) where this information is found in the proposal	(c) statement why protection is necessary
Salesforce Project Portal Online image	Website / page 145	The redacted material is proprietary information related to our proposed solution.
University of Central Florida Website	Website / page 146	The redacted material is proprietary information related to our proposed solution.
Training Approach image	Training Approach / page 148	The redacted material is proprietary information related to our proposed solution.
Training Lead professional information	Training Staff / page 149	The redacted material contains personal information concerning identifiable individuals.
Collaborating with Mason image	Collaborating with Mason / page 150	The redacted material is proprietary information related to our proposed solution.
Training Responsibilities table	Responsibilities / page 151	The redacted material is proprietary information related to our proposed solution.
Training Plan Inputs	Contractor Training Plan / page 152	The redacted material is proprietary information related to our proposed solution.
Hypercare timeline	Post Implementation / page 160	The redacted material is proprietary information related to our proposed solution.
Name and picture of the Project Management Lead	SDLC Services/ page 87, 167, 182	The redacted material contains personal information concerning identifiable individuals.
Project management capabilities image	Mason Project Governance and Management / page 169	The redacted material is proprietary information related to our proposed solution.
Quality tools table	Our Responsibilities / page 170	The redacted material is proprietary information related to our proposed solution.
Quality audit table	Performance Measures / page 171 – 172	The redacted material is proprietary information related to our proposed solution.
Project Schedule table	Project Schedule / page 174	The redacted material is proprietary information related to our proposed solution.
Meeting and Reports requirement table	Meeting and Reports / page 177 -178	The redacted material is proprietary information related to our proposed solution.
Communications table	Communication / page 178-179	The redacted material is proprietary information related to our proposed solution.
Penn State Case Study	Stakeholder Communications / page 180	The redacted material is proprietary information related to our proposed solution.
Background Check Information	Additional Staffing Requirements / page 182	The redacted material is proprietary information related to our proposed solution.
Release Schedules	Appendix 11 / page 185-186	The redacted material is proprietary information related to our proposed solution.
XIV. Proposed Pricing		
Proposed Pricing Information	Proposed Pricing / page 188- 190	The redacted material is proprietary information related to our proposed solution.

(a) the information to be protected	(b) the section(s)/page number(s) where this information is found in the proposal	(c) statement why protection is necessary
5. Additional Questions		
Current Litigation	Additional Question / page 192	The redacted material is proprietary information to our company.
Investigations	Additional Question / page 192	The redacted material is proprietary information to our company.
Lawsuits	Additional Question / page 192	The redacted material is proprietary information to our company.
Name Change	Additional Question / page 193	The redacted material is proprietary information to our company.

In relation to RFP Instruction XIII.A.2.d, we have carefully and precisely identified the select words or images that are Trade Secrets or Proprietary Information (XIII.A.2.d (2)) in the above table (XIII.A.2.d (3)). We provide this redacted version accordingly (XIII.A.2.d (3)) Identifying the select words or images that are Trade Secrets or Proprietary Information in the unredacted version can be performed by comparing the redacted and unredacted versions (XIII.A.2.d (1)).

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To whom it may concern,

We are pleased to respond to George Mason University's Student Lifecycle Transformation RFP (GMU-1859-23). Mason's goal to be the "university of choice for every resident of the Commonwealth who seeks a degree or to grow a business" encapsulates the important role Mason plays in our local communities and the Commonwealth as a whole. Mason desires to explore innovative solutions with an optimal Customer Relationship Management (CRM) system that helps deliver a Transformed experience for your students.

Accenture brings you a committed team drawn from the Nation's No1 Salesforce practice and our leading Education specialists. We are ranked #1 by various analysts for our deep and impactful Salesforce deployments across all industries. This is important because it means we have the delivery experiences and lessons learned that apply to the most impactful Salesforce projects. Our Salesforce capability is augmented by our deep Higher Education experience, which you have seen in the engagements we have performed with you and is exemplified by the team we bring. We are the best partner for Mason for this vital project because:



We're Committed to George Mason University

Through our strategic projects, campus recruiting efforts, and extensive volunteer work with Mason, we understand the University's current challenges and aspirations for the future and are equipped to serve you as a trusted partner with your interests in mind, that can tell you the "hard truths", bring public sector and private sector leading practices, and sit shoulder to shoulder with you to confirm the success of any program.

Most importantly, with 800+ Mason alumni currently employed at Accenture, we are passionate about Mason and its people. We understand the caliber of your decision—and this extensive alumni network at Accenture will allow us to partner with the University with a continually informed perspective. This passionate group of professionals serve as an exploratory gateway to forecast potential growth opportunities and validate our direction as we transform the George Mason student experience beyond its traditional boundaries—all the way from discovery and design to delivery and deployment.



We're at the leading edge of Salesforce, just like George Mason University is

Mason is about to embark on a first-of-a-kind implementation of the new Salesforce Education Cloud product. No-one has implemented this product before, and therefore Mason needs a partner who has the broadest set of experiences to draw on. The Salesforce Education Cloud product is the latest Higher Education specific version of Salesforce, and very similar to other industries versions of Salesforce. Our experience across those other industries holds Mason in good stead, as we have previously implemented those versions multiple times and can bring the relevant lessons learned, and importantly personnel, to Mason.



We'll Bring You Cross-Industry Insights and Capabilities

We bring the best of both worlds – transformational services across 40+ industries and deep education industry experience with 400+ education clients and 700+ education practitioners. At the foundation of our education practice sits the power of Accenture's functional practitioners and cross-industry offerings that have been tailored to education. Independent analysis typically ranks Accenture as the most impactful Salesforce partner, which means we have the best and broadest experience to offer Mason. We also offer a strong network of relationships and partnerships with workforce nonprofits across the country through corporate citizenship and have a point of view on supporting/tapping into untapped "hidden workers". We have strategic partnerships with many large companies with offices in the commonwealth and broader DC, Maryland, and the Northern Virginia area (Amazon Web Services, Microsoft, IBM, and Google) to help support Mason in bringing people to the table.



We're Serious About Your Innovation

We know that innovation is infused at Mason is at every level especially with its students. We have seen firsthand how innovative Mason students are through our sponsored Hackathon events and during the Accelerate 2022 Investor and Startup Business Competition. At Accenture, we've invested \$1B+ in the last five years in deepening and scaling our innovation capabilities, which range from small business incubation to rapid prototyping to a global network of hundreds of R&D labs, hubs, and centers. We're serious about making investments that keep our clients ahead of disruption and have acquired 100+ leading design thinking, IoT, blockchain, cloud, cyber, analytics, research, and training companies to do so. Mason will have access to the most innovative ideas and practices to help you execute quick wins, build momentum, and deliver lasting change.

We're regularly taking the pulse of higher education leaders, students, faculty, and staff on topics ranging from the student experience across modalities and academic levels, the lifelong learner market, faculty and staff retention, infrastructure and sustainability demands, and pressurized funding. We've brought some of these insights to Mason already (for example, we contributed to cybersecurity curriculum development). As a partner, we'll continue to bring these insights and capabilities, along with an expert team which understands how to design and deliver an innovative Student Experience for Mason.



We Care About What You Care About

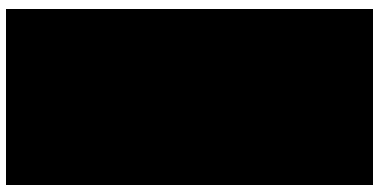
Accenture is also committed to being a force for good in our local communities especially when it comes to equipping Virginia residents from diverse backgrounds with the skills, employment opportunities and experiences to thrive.

- Commitment to Diversity, Equity, and Inclusion (DEI):** Like Mason, Accenture takes DEI seriously, not just for our clients, but also for our own people. Accenture has earned a top spot on Refinitiv Index of World's Most Diverse and Inclusive Companies consecutively for the past six years, and this May, we were recognized as number one on DiversityInc's 2022 Top 50 Companies for Diversity list and were welcomed into DiversityInc's hall of fame. Accenture has not stopped at creating a more inclusive workforce for ourselves—we view our progress as a responsibility to share the lessons learned, methods and tools regarding DEI and apply them with our clients and partners, and to walk with them every step of the journey. Our diverse team will work alongside Mason stakeholders to help us co-create a solution that serves the next generation of diverse leaders, your students. Like Mason and [President Gregory Washington](#), Accenture's leaders are being recognized for our important work and impact related to DEI. Marty Rodgers, Accenture's Senior Managing Director for Metro D.C. was recognized for his leadership and influence in the areas of diversity, equity, and inclusion in the Washington Business Journal Diversity in Business Awards 2022.
- Deep existing knowledge of and active leadership in the skills and skilling ecosystem:** We see the impact that Mason is having on the Commonwealth of Virginia with successful initiatives like the ADVANCE program with Northern Virginia Community College and the commitment to upskilling and micro-credentialing. We are deeply embedded in the skills and skilling ecosystem as well. Our investments in the following areas demonstrate this commitment: thought leadership (recently partnered with Harvard Business School on Hidden Workers, a potential skills-matching and training program), active partnerships with the Business Higher Education Forum, SkyHive, BurningGlass, and other leading skills/skilling partners, and lastly the skilling work we sell to and deliver with our clients. We recently helped a client develop a new skills line of business which will include skills diagnostics, talent matching, and skills progression – all powered by platform technologies. Our own internal programs also demonstrate this commitment. Through our global Skills to Succeed initiative, we have equipped more than 5.8 million people worldwide with the skills to make substantive improvements in their lives. We understand and appreciate Mason's focus on upskilling both its students, as well as training and upskilling its staff.
- Empowering the next generation:** Mason has set clear priorities and intends to prepare Mason students for life outside of campus utilizing partnerships with non-profits and industry leaders. Those partnerships inform your programs, as you infuse students into those partnerships and flex those programs significantly

based on feedback from your partner ecosystem. Close to 70% of Mason students will have some “hands on” experience via internships, externships, or real-world experiential learning. As a target school for Accenture, we will continue to work with Mason to support your infusion of industry into Mason and to recruit significant numbers of your students into Accenture.

Supporting this important work is personal to me. Many of my family members attended Mason including my wife and brother-in-law and for the past 6+ years I have served on the Mason Entrepreneurship Advisory Council. As Accenture’s lead for our higher education and public sector clients in Virginia and across this region, you have my commitment that our project team will help Mason deliver the outcomes that you need and expect. Should you have any questions or require additional information, please contact me at david.t.metnick@accenture.com or (703) 947-4072.

Sincerely,



Managing Director
Accenture LLP | Education, Health & Public Service



1

Procedural Information



Purchasing Department
Mailing Address: 4400 University Drive, Mailstop 3C5
Street Address: 4441 George Mason Boulevard, 4th Floor, Suite 4200
Fairfax, Va. 22030
Voice: 703.993.2580 | Fax: 703.993.2589

April 7, 2023

RFP ADDENDUM #1

Reference – Request for Proposal:
Title:
RFP Dated:
For Delivery To:

GMU-1859-23
Student Lifecycle Transformation
March 13, 2023
George Mason University

The following changes are hereby incorporated into the aforementioned RFP:

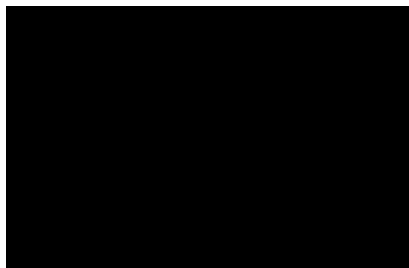
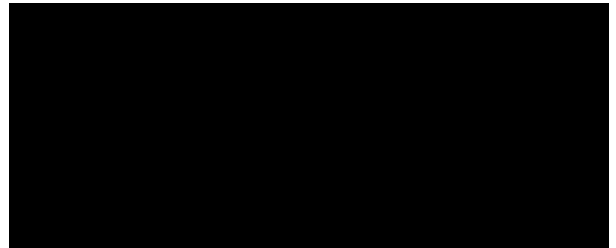
Please make sure to sign and include this addendum and all other addendums issued under this RFP with your offer/proposal.

- **Answers to Questions submitted by the Question Submission Deadline on March 21, 2023**
 - **The proposal due date has been amended from April 14, 2023 to April 28, 2023 at 2:00PM.**
 - **Offerors must complete and email both Buyers a signed copy of the NDA to receive a copy of the Salesforce Research and Analysis Assessment performed by Huron Consulting Group.**
 - **There will be no changes to the amended due date-it is the offerors responsibility to submit the request along with the signed NDA to view the full Assessment in a timely manner.**
- Answers to these questions shall be considered part of the RFP requirements and the offeror should include any changes that result from this addendum into their offer. Failure to consider the information provided below may result in your offer being scored lower.**

Please sign and include this addendum as part of your offer.

In Compliance With this RFP And To All The Conditions Imposed Therein And Hereby Incorporated By Reference, The Undersigned Offers And Agrees To Furnish The Goods/Services required by this RFP at the prices indicated in the pricing schedule, and the undersigned hereby certifies that all information provided below and in any schedule hereto is true, correct, and complete.

Name and Address of Firm:
Accenture LLP
800 North Glebe Road, Suite 700 Arlington, VA 22203
Fed ID: 72-0542904
Email: David.t.metnick@accenture.com



b. Small Business Subcontracting Plan

b. Return Attachment A - Small Business Subcontracting Plan.

Accenture is not planning to include a sub-contractor for this response. Please see Attachment A at the bottom of this document.

c. Payment Preference

c State your payment preference in your proposal response. (See section XVII.)

Accenture has selected Option #3 - Net 30 Payment Terms.



2

Executive Summary

Executive Summary

As an organization you have set your aims high: “George Mason University has always been more about where we’re going than where we’ve been. And its star has never shined brighter than it does right now” (George Mason University President Gregory Washington).

We recognize that **transforming your Student Lifecycle** is a major endeavor— one that, if done right, provides that shining beacon to enhance and broaden student opportunities, and attract the best researchers, outside partners and donors. Let’s explore this together through a selection of your Core Beliefs.

The diversity of Mason is your greatest strength - 39,150 students from 50 states and 130 countries.

Each of your students expects a personalized experience to maximize their performance and simplify their journey through the University.



MASON GOAL: We believe in inclusivity over exclusivity.

Your Student Lifecycle Transformation centers around all parts of Mason coming together to provide students with the support they need, enabled by an optimal Customer Relationship Management system that is aligned with your goals and integrated into your existing systems. To do this, the University requires a partner who will work with your stakeholders and constituents in an inclusive, human-focused, data-enabled manner ensuring that the student experience lies at the center of everything we do. For the last 30 years, Accenture has been leading inclusive change initiatives and was recently named #1 in Digital Change and Ability to Execute by HFC Research – proving that we can build and execute an inclusive change program that sticks with Mason.

Our inclusive and experienced team will collaborate and partner with Mason leadership and teams to determine the appropriate resources needed to complete the implementations within your target timeframe - providing Mason with the deep industry and salesforce skills necessary to successfully execute and sustain this project.

MASON GOAL: We believe in advancing our mission by being willing to take risks, not avoiding them.

Your aim is ambitious, but achievable. This Student Lifecycle Transformation is not a small step; it requires vision and diligent execution. We’re committed to delivering quick wins along the way to build momentum for the transformation through our agile approach, setting direction and iterating as we go. Our mantra for this project is to aim for the stars, not settling for the ordinary which is in place across other institutions. As the #1 Salesforce partner globally, we lean heavily on our knowledge from industries outside of Higher Education to supplement our strong bench of education specialists. This blend of expertise and skills enables us to infuse innovation into proven methods and craft an unparalleled experience for all of Mason’s impacted stakeholders.

MASON GOAL: We believe our best work is only possible when we apply our diversity of origin, identity, circumstance, and thought.

We couldn’t say this better, and it’s part of our core principles too. We approach inclusion, diversity and equality with the same discipline and rigor as any other business priority—we set goals, share them publicly, and collect data to continuously improve and hold our leaders accountable. Accenture has been recognized as #1 on DiversityInc’s 2022 Top 50 Companies for Diversity list, for a 16th year in a row - a recognition that also welcomes the company into its Hall of Fame. Our focus is on creating an inclusive and equitable culture, and the next generation of diverse leaders in our local communities. Given this shared value, we will confirm that we infuse this in the teams, ideas and ways of working throughout the program.



Student Experience Led

- Education Cloud assurance – our people are more than just trained on the new Salesforce product; they are experienced in the underlying technologies of Education Cloud due to using them in other industries
- Collaboration – critically for Mason, your partner Accenture will implement **WITH YOU** not **TO YOU**.
- Our approach begins with an Experience Map that defines the Students needs from their perspective – holding the Student Experience at the core of the project

MASON GOAL: We believe talent is equally distributed among people, but opportunity is not. At Mason, education is opportunity's great equalizer.

Mason requires more than just a higher education specialist for this work, you need a partner who has the broader experience, is a powerhouse for talent and engine for growth, and who has partnered with private-sector organizations like Amazon and Uber in the experience economy. Open perspectives like these help us help Mason delivery the most impactful education for your Students. We can help prepare your students for long term success with our strong partnerships across all industries.



Diverse and Holistic Experience

- Deep enterprise transformation experience, enabling clients to envisage and swiftly enact their desired future
- World class experiences from other industries applied to Higher Education
- Accenture's scale of bench, depth of experience both inside education and externally gives Mason the best of all worlds

MASON GOAL: We believe we grow wiser and stronger from examining our full truths, no matter how complicated, messy, or discomforting they might be.

We are equipped to serve you and hit the ground running as a trusted partner—a partner with your interests in mind, that can tell you the “hard truths”, bring deep public sector and private sector leading practices, and sit shoulder to shoulder with you to confirm the success of this high-stakes program. We know that trust, openness and transparency are at the center of your needs in the partner for this work.



Invested in MASON

- Mason is a target school for our hiring. 800+ Mason alumni work at Accenture locally.
- Committed to the GMU Community with the
 - GMU entrepreneurship advisory council
 - Cybersecurity curriculum development
 - George Mason Hackathon event
 - Accelerate 2022 investor and startup business competition
- Quarterly innovation days with our high tech and experience economy clients and partners

Our innovative, collaborative approach for MASON demonstrated with past successes

Two-Wave deployment going live in January 2025 and July 2025. This approach helps Mason to successfully navigate their CRM transformation and optimize collaboration.

The **Agile approach** will show you quick wins along the way, improving the outcome for Mason through embedded collaboration using a rapid iterative design and development approach.

Understanding how a **student “experiences”** George Mason University is at the heart of the project and is informed by the education industry and interactions using design thinking and conference room pilots.

Managing change so that everyone impacted understands the why, what's in it for me, and what does good look like to gain buy-in before moving into training.



3

Qualifications and Experience



3. Qualifications and Experience

Describe your experience, qualifications, and success in providing the services described in the Statement of Needs to include the following:

a. Background and brief history of your company.

Continuous innovation and rapid transformation have been themes throughout Accenture's more than 60-year history. Accenture is one of the leading global professional services companies, providing a broad range of services in Strategy and Consulting, Technology, Operations, Industry X and Song (formerly Interactive). We combine unmatched experience and specialized capabilities, as shown in Figure 1 to bring continuous innovation to help our clients improve their performance and create lasting value across their respective enterprises.

We operate at the heart of our clients' businesses, helping address their most complex, mission-critical issues. Accenture's clients span the full range of industries around the world and include 95 of the Fortune Global 100 and more than three-quarters of the Fortune Global 500.

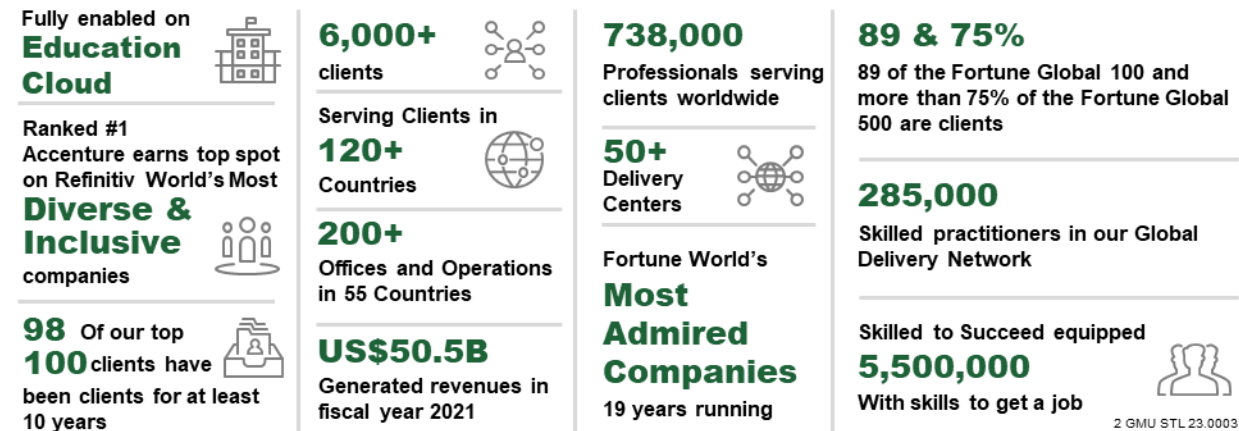
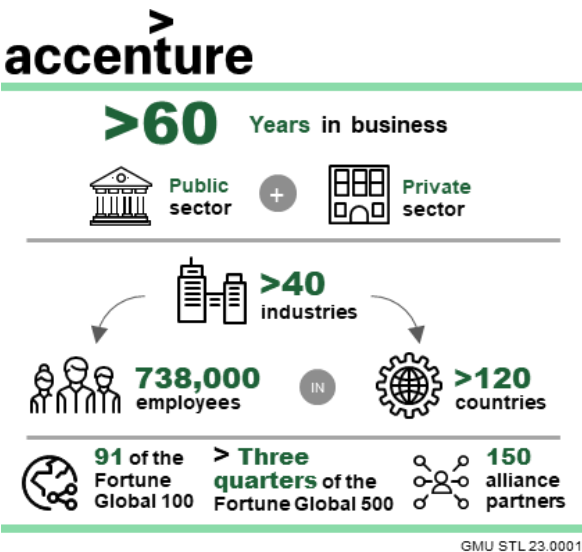
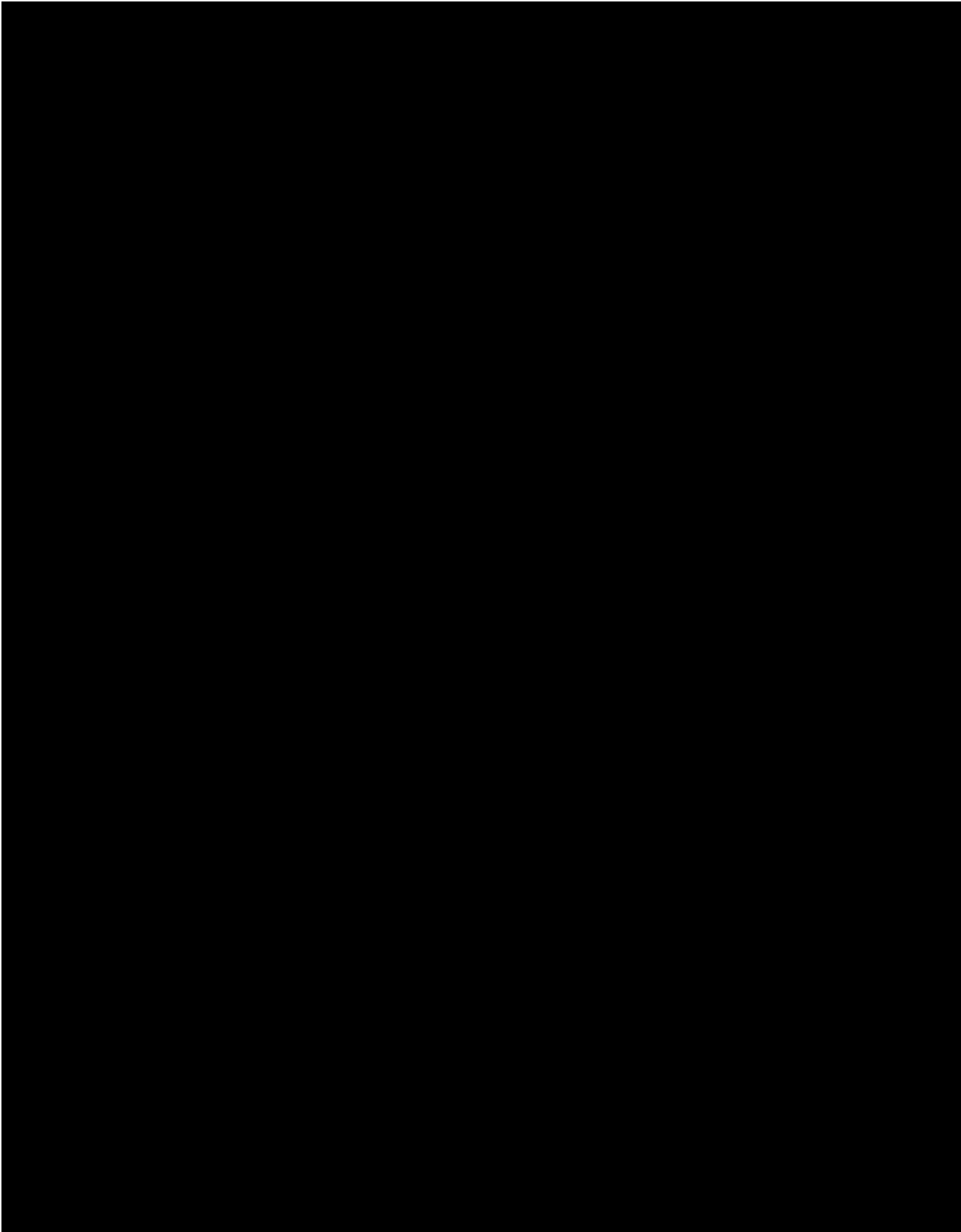


Figure 1. Accenture brings you a strong global presence and a broad range of services and skills from shaping new digital strategies to enabling liquid and agile ways of working to running and automating digital processes.



Mason will benefit from having team members who know this area, are invested in the community, and share your commitment to serving Virginians. **Most importantly, with 800+ Mason alumni currently employed at Accenture, we are passionate about Mason and its people.**

Accenture's Education Practice Overview

Accenture's Education practice consists of over 700 professionals that have served more than 400 primary and secondary education, post-secondary institutions, for-profit learning institutions and national, state, and local oversight education agencies across the United States, as depicted in Figure 3. We help these organizations fulfill their educational and research missions in a sustainable manner.

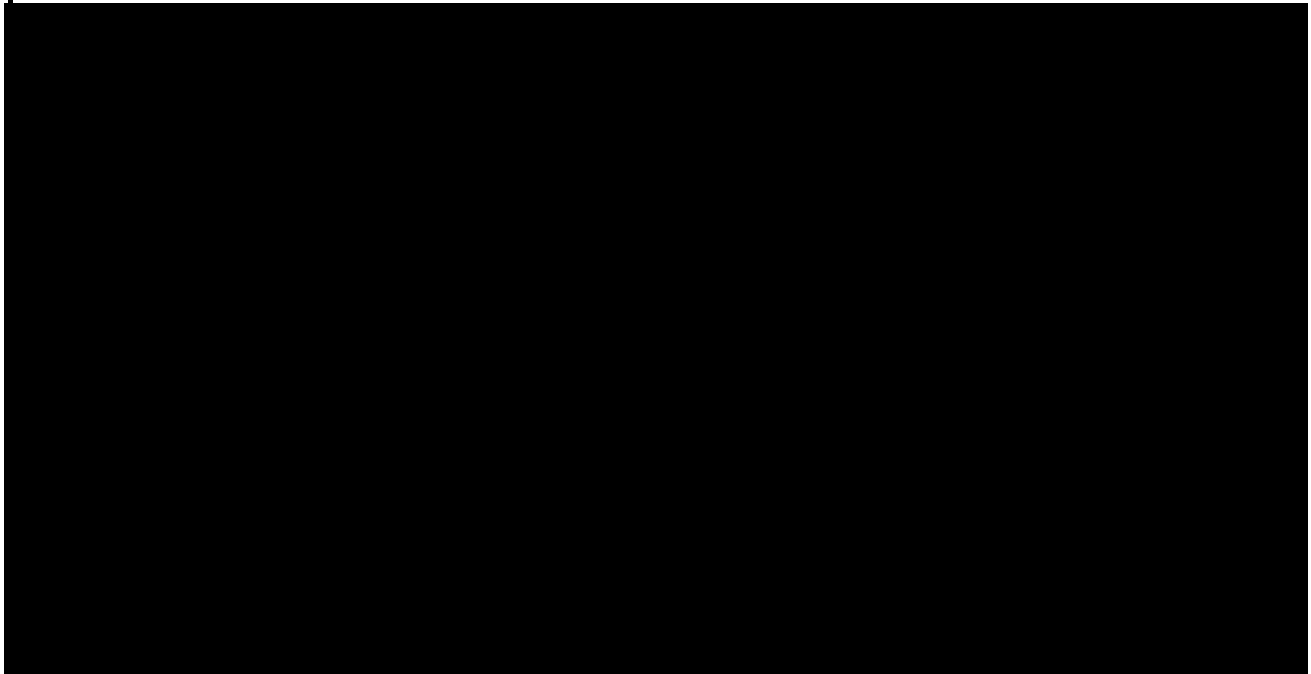


Figure 3. We apply our approaches and experience to deliver to their stakeholders in new and unique ways.

We are proud to list George Mason University as a foundation client within our Virginia practice, with our most recent engagements being the Performance Management Assessment (2022), COA Process Mapping (2021), Learning IT Governance (2021), Tier 3 Roadmap Support (2021), and Strategic Plan Support (2021). Our Education Practice brings the following:

- **Strength of Team and Experience:** Our education practice is a unique blend of practitioners who, prior to joining Accenture, have worked for education institutions, even walked the same halls as you. Our team also has deep experience supporting program management, functional, change management, communications, and training. We blend the Salesforce CRM implementations experiences from multiple industries with our Higher Education skills.
- **Proven Methodologies and Understanding of Leading Practices:** Our team is involved in developing leading practices for the industry using insights from the 40+ industries to apply new 'ah ha' moments for our Higher Education clients, enabling progress far beyond standard expectations, helping us to be a driver for change and to enhance our clients' effectiveness and magnify our impact.
- **Higher Education Experience:** We understand higher education and the environment it faces. We know that it takes collaboration across stakeholders to drive change. We have worked with education institutions, including nonprofits, government agencies, regulatory entities, employers, and more.

- **Innovative Research:** We understand that doing things “the way they’ve always been done” is not what Mason is looking for in a partner. Our Education Practice has pursued research to better understand the learner’s mindsets and motivations, and how universities can differentiate their approach to how they serve students over their lifetime and improve overall student satisfaction.





Success Story - Diverse and Holistic Experience

Our recent study on learner mindsets found that there are six segments of learners who are clustered based on learning mindsets, goals, and emotions rather than demographic factors. We have also uncovered program and service delivery preferences by segment, which can provide insights into how institutions like Mason can appropriately assess service gaps, address student needs, and expand their research to new learner groups. We build these learnings and this research into the fabric of our Salesforce delivery.

Figure 4 displays recent publications and research we use as anchors when delivering services to clients.

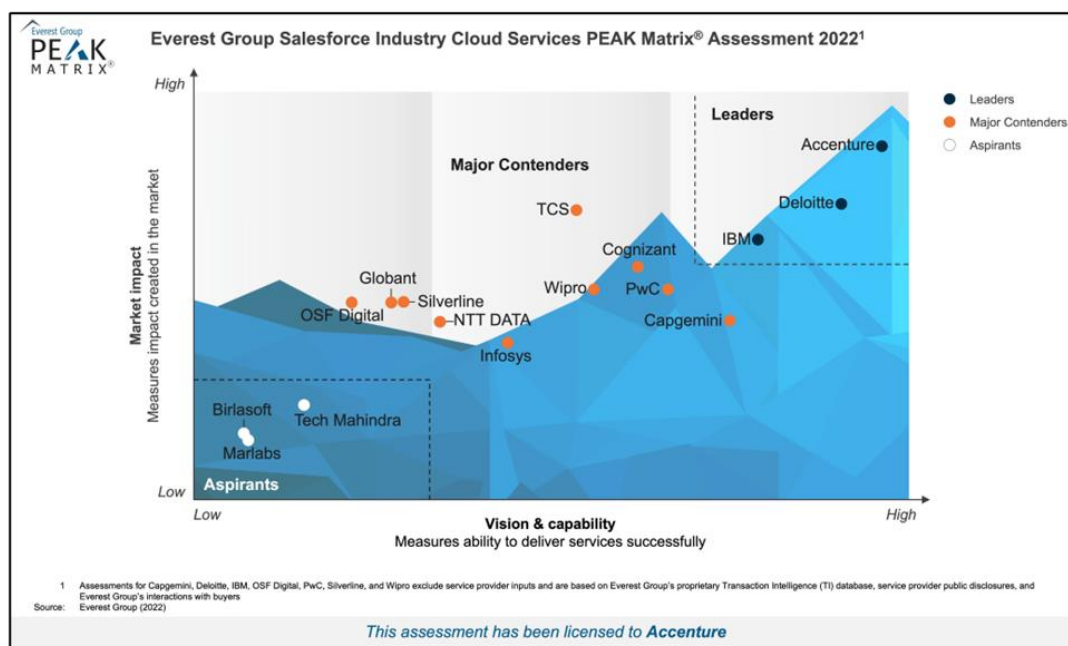
Publications		Research	
 <h4><u>Understanding Learner Mindsets</u></h4> <p>In Summer 2021, we surveyed US learners aged 16 to 65+. Our research went beyond most student surveys to include the population of “all learners” to identify six common learner mindsets and their motivations.</p>		 <h4><u>Higher Education Studies</u></h4> <p>Our leadership publishes research articles on critical topics within education. For example, we recently partnered with Lumina on a study on company-sponsored tuition programs.</p> <p>We regularly publish our own internal research insights. Most recently, we distributed insights from survey results of learner mindsets.</p>	
 <h4><u>Technology Vision Higher Education</u></h4> <p>For 20+ years, Accenture has developed the Technology Vision report to identify emerging technology trends. This report contains key trends higher education leaders must embrace to forge a better future.</p>		<h4><u>Future of Work</u></h4> <p>Digital technologies demand that people acquire new skills, and people are demanding new ways of working. These two trends call for new talent and organization strategies. Accenture has gathered key future workforce insights and developed a comprehensive “Future of Work” approach that creates a more productive and adaptive workforce, uses digital technology to reinvent the employee experience and redesigns organizations to be more agile.</p>	
 <h4><u>The Post-Pandemic Higher Ed</u></h4> <p>In Summer/Fall of 2020, we conducted an interview series with higher education leaders to gain insight into what education, student support, and operating models will look like in post-pandemic higher ed.</p>		<h4><u>Future Workforce Insights</u></h4> <p>Putting human skills at the heart of competitiveness and growth in the age of intelligent technology.</p> 	
 <h4><u>Education Blogs</u></h4> <p>Our education leaders frequently post about the latest topics trending within education and public service.</p>			

Figure 4. Accenture's Thought Leadership in Education provides unique insights during client implementations.

Accenture and Salesforce

The Accenture Salesforce Practice is an information technology professional services organization that specializes in systems integration, implementation, custom development, and support of enterprise information systems. Our relationship with Salesforce started in 2004, and we are one of the first companies to establish a strategic alliance partnership. The Accenture Salesforce Practice is a Premium Partner with experience implementing **Salesforce Education Cloud, Experience Cloud, Marketing Cloud and Pardot, Sales Cloud, Service Cloud, Salesforce Student Success Hub**, Einstein Analytics and Tableau for higher education. We are proud to be listed as **the leader for Salesforce services** by independent analysts. Most recently, [Accenture was recognized by Everest Group](#) as the leading Salesforce Industry Cloud Service partner amongst other firms in the industry depicted in Figure 5 and Figure 6. In addition, Accenture is recognized by Forrester as the top Salesforce implementation partner and Salesforce consulting partner amongst other firms in the industry.

Everest Group Salesforce Industry Cloud Services PEAK Matrix® Assessment 2022



In the report, Everest Group states:

- "Accenture is strongly positioned as the overall market leader in Salesforce Industry Cloud services for its consulting-led approach to helping clients with their largest transformations."
- "Accenture stands out for the value and transformational impact it delivers to clients, as well as for its innovative vision, future roadmap and strategy."
- "Accenture's strong industry knowledge, its ability to orchestrate capabilities through thought leadership, and a consulting-led approach make it suitable for large-scale transformation deals."
- "Clients have recognized Accenture for its track record of successful implementations, techno-functional expertise, and a scaled talent pool of industry cloud resources."
- "Accenture's consistency in winning Salesforce Partner Innovation Awards and recognition with the highest industry expertise level indicates its capability and credibility in the market."

GMU STL 22.0008

Figure 5. Accenture named the leader in the Everest Group Salesforce Industry Cloud Services PEAK Matrix Assessment 2022.

Forrester Wave™: Salesforce Consulting Partners, Q2 2021



In the report, Forrester states:

- “Accenture stands out for its scale and ability to tackle complex transformation work.”
- “Accenture is Salesforce’s largest partner, with more than 20,000 practitioners working on Salesforce projects and with deep experience across all major Salesforce Clouds — including Sales Cloud, Service Cloud, Marketing Cloud, Commerce Cloud, Platform, and MuleSoft. The firm has significant experience in Salesforce Industry Clouds, including the recently acquired Vlocity products.”
- “Accenture is extremely skilled in complex Salesforce deployments where fundamental business change is the key goal.”
- Accenture “has unparalleled breadth and depth of capabilities spanning technology, design, consulting, long-term operations, and skills, not only with Salesforce but also with the Salesforce ecosystem.”
- “Accenture is a good choice for clients with a bold, ambitious vision and a high level of technical complexity.”

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GMU STL 22 0009

Figure 6. Accenture named the leader in the Forrester Wave Salesforce Consulting Partners, Q2 2021.

Our Salesforce Practice

The Accenture Salesforce Practice is one of a few groups that offer the capability and commitment to the entire Salesforce suite along with an established delivery methodology to facilitate successful project execution across the suite. Key advantages of working with the Accenture Salesforce Practice include:

- We are one of **Salesforce.org’s longest running partners** and co-develop solutions with Salesforce with strong links within product development, and resolving issues when they arise.
- We have **your end-to-end technology needs in mind and have the experts to address them**. Using our managed/unmanaged approach to transform a blank canvas to a fit-for-purpose tool.
- We apply our Salesforce knowledge, integration technology specialization, and industry experience to help our clients bring multiple entities into a **unified 360-degree engagement with constituents**.
- The Accenture Salesforce Practice has helped clients implement **CRM and Marketing capabilities** that provide students and institutions with opportunities throughout the student lifecycle.
- Our Salesforce-certified consultants have deep experience with higher education and helping clients implement **Recruiting, Admissions, Student Services and Success** – One-Stop and Advising, **Online**

Accenture has the largest Salesforce practices



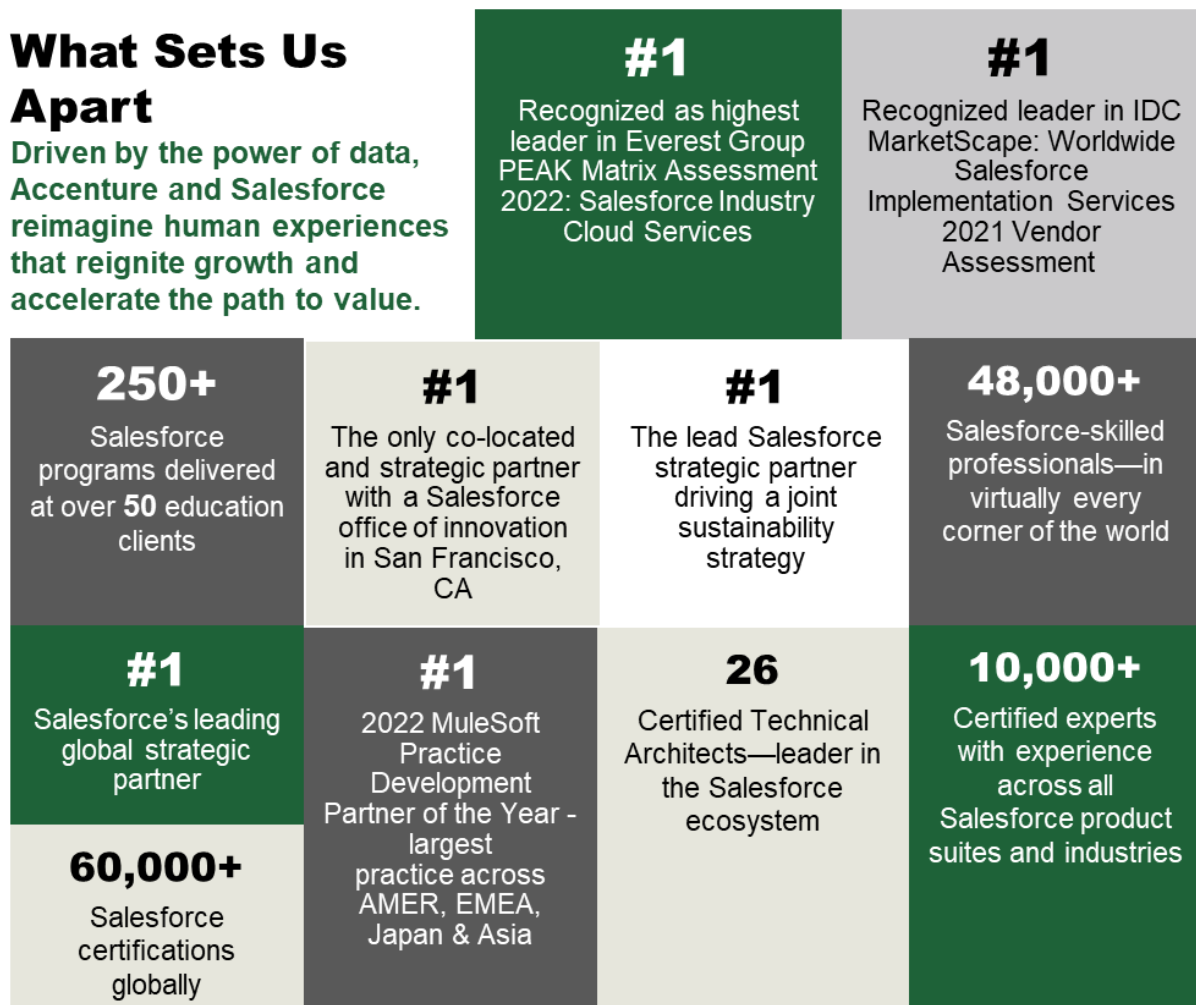
including the most Certified Technical Architects in the industry that will allow us to address – and scale to – the complexity across the university.

Portals – Applications, Case Management, and **shopping cart functionality**, Continuing and Executive Education, Corporate Relations, and Alumni and Donor Prospecting and Engagement functionality.

- Our extensive **experience in implementation methodology** is particularly effective for architecting enterprise-wide applications for complex multi-campus education organizations.
- The Accenture Salesforce Practice was the **first Salesforce provider to implement Education Data Architecture (EDA)** – formerly referred to as Higher Education Data Architecture (HEDA), and the first to deploy Salesforce Advisor Link – now referred to as Student Success Hub.

Salesforce implementations

With thousands of Salesforce implementations at more than 1,100 global enterprises, we lead Salesforce's largest and most impactful transformational projects. Together, we have helped clients innovate at scale, transforming all facets of their business and industries; helping our clients accelerate the full potential of cloud computing to meet emerging business and technology challenges, reflected in Figure 7.



GMU STL23.0101

Figure 7. We developed hundreds of successful enterprise scale, Salesforce-based solutions.

As part of our innovation efforts, our senior Salesforce consultants participate in ongoing training, bootcamps, product development discussions, and advisory councils that advance Accenture research-based insights and pioneering client engagements.

Salesforce meets the Needs of Higher Education

As a leading provider of consulting services for education, the Accenture Salesforce Practice offers broad business process experience and a commitment to serving the needs of higher education, reflected in Figure 8. Our consultants have served hundreds of unique colleges and universities ranging from traditional four-year and Carnegie R1 institutions to community colleges, public and private colleges and universities, and for-profit institutions. We are also the only firm to have deployed an enterprise-wide Salesforce CRM at an R1 higher education institution.

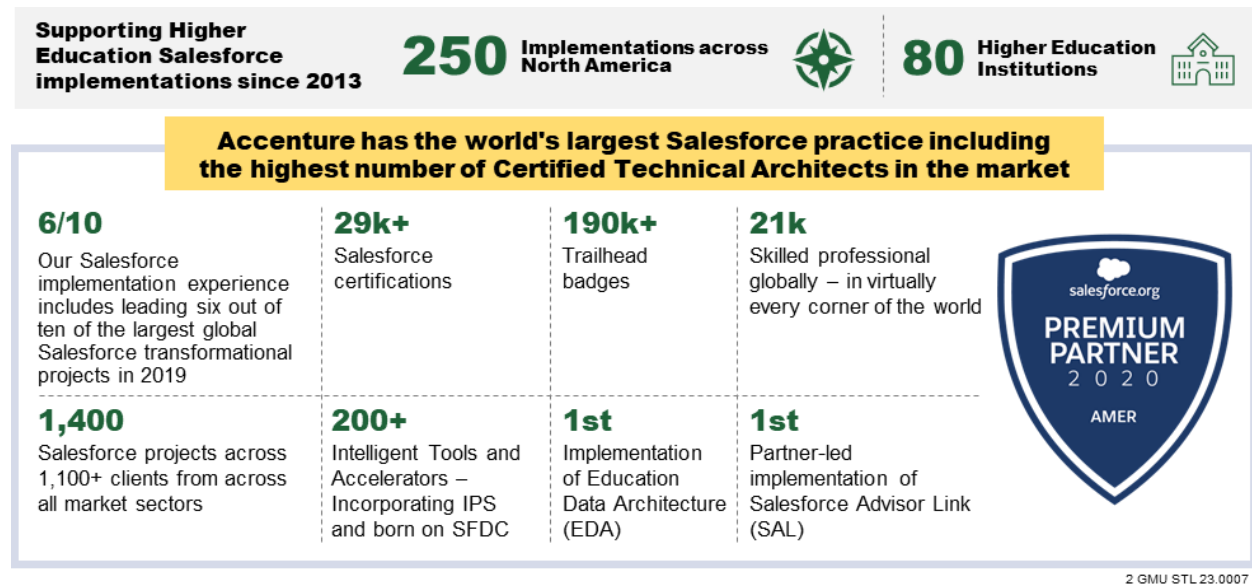


Figure 8. Salesforce's experience connects campuses for students, alumni, staff, and donors.

We do not assume that one approach fits all, and we take the time to learn about our client's needs. To develop a solution that meets all of Mason's needs, we approach the project with inclusion, diversity, and equality at the core of our mindset. The approach results in improved engagement and consistency with complex program methodologies for students, alumni, faculty/staff, university / external organizations, and the clients' systems of record.

Accenture has worked with multiple stakeholder groups to establish and implement a university-wide Enrollment Management as part of the first phase, including campus-level admissions and student services teams, central IT, central administration, and third-party vendors, reflected in Figure 9.

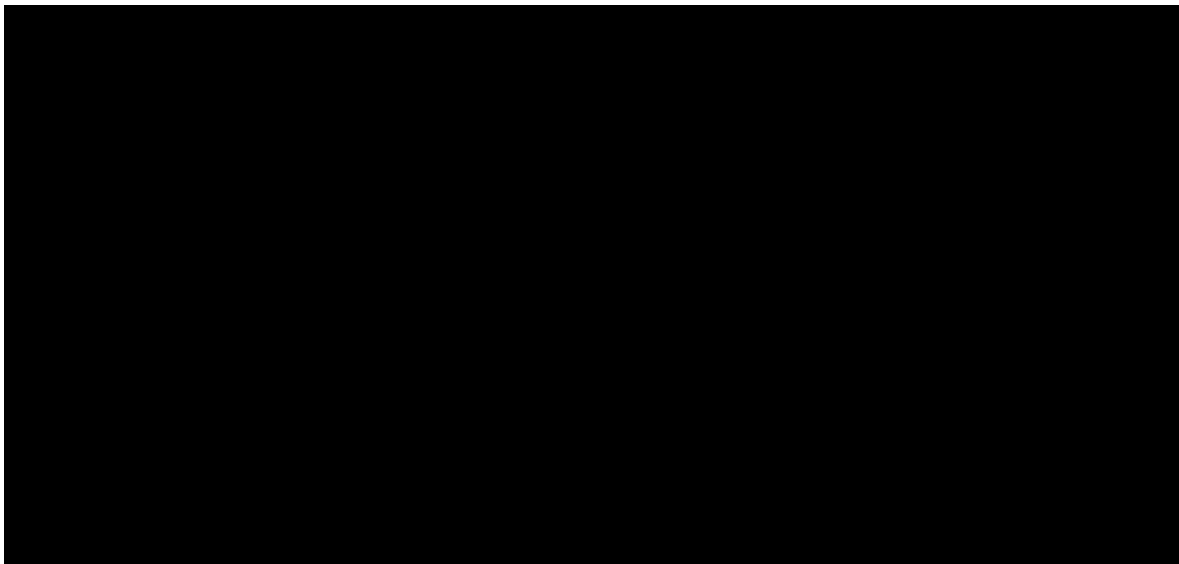


Figure 9. We have supported the long-term Salesforce roadmap to include Foundation, Athletics, and other areas of the university which expect to utilize the enterprise framework.

Salesforce and the Student Experience

We recognize that overcoming the challenges that students face requires institutions to reimagine how they communicate and engage with their students to create an equitable, connected, and intentional experience. We also understand that implementing a digital-first strategy can be hard in practice. Data silos, legacy systems and more can feel like an anchor, preventing institutions from moving forward with where they want to go. That is why Salesforce, working alongside its customers, created the Customer 360 – a completely digital-first platform that puts learners, faculty, staff, and families at the center of the digital experience, reflected in Figure 10.



Figure 10. The Customer360 is designed to provide the flexibility and fast time to not only thrive today but also well into the future as new revenue models and learner experiences evolve over time.

Accenture and Data

With over 2000+ Certified Data Architects, and renowned Data and Artificial Intelligence (AI) thought leadership, we have deep experience assessing and defining data architecture. This experience includes data modeling, patterns for traditional Data warehouses, and big data solutions with unstructured or high

velocity data. Accenture has vast experience across Higher Education, private and public sector verticals, with business value driven implementation plans that account for leadership reporting requirements (high value use cases), strategic goals, data readiness focused on delivering business value in each sprint as the foundation is built out, data product by product, reflected Figure 11.

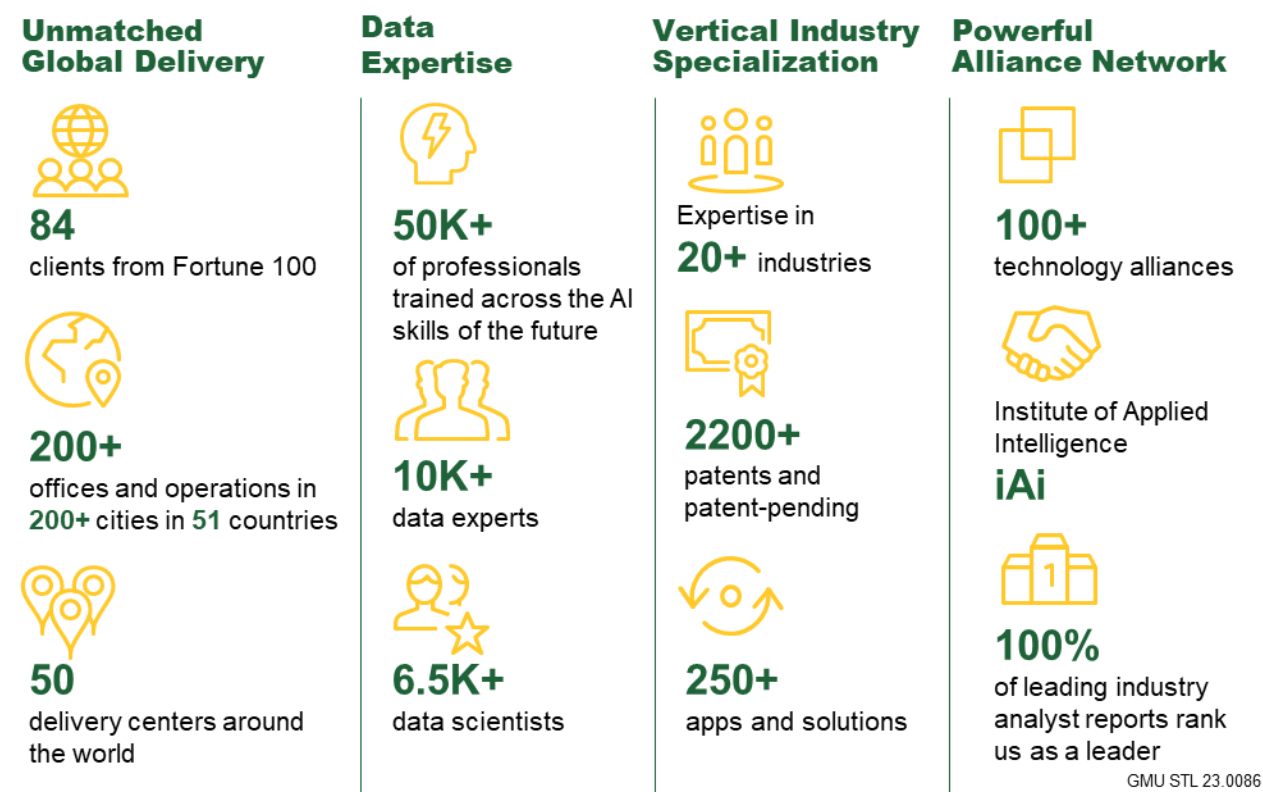


Figure 11. We bring unmatched global delivery, data expertise, and industry partnerships to support Mason.

Accenture has been named overall Leader and Star Performer—ahead of all providers in Market Impact and Vision & Capability, according to Everest Group. This strong positioning is a testament to Accenture’s IP-led approach to Enterprise Data and Analytics services delivery, our active investment in responsible AI, our End to End (E2E) offerings and the robust partner ecosystem we have built.

Accenture brings in a comprehensive portfolio of Data and Analytics (D&A) offerings and proprietary solutions, and deep domain / vertical experience underpinned by a strong talent pool. It has an increased focus on infusing data and AI across its offerings that enables clients to generate higher value from their digital transformation initiatives,” said Vishal Gupta, Vice President, Everest Group. In addition, Everest noted that clients praised our

- “strategic partnership it offers in engagements and its ability to co-innovate”
- “delivering value”
- quality resources in terms of “strategy-focused engagements” and “good technical and domain expertise especially in industry-specific nuances”

Figure 12 reflects Accenture has been named a Leader in Gartner’s 2022 Magic Quadrant market research report for data and analytics service providers.

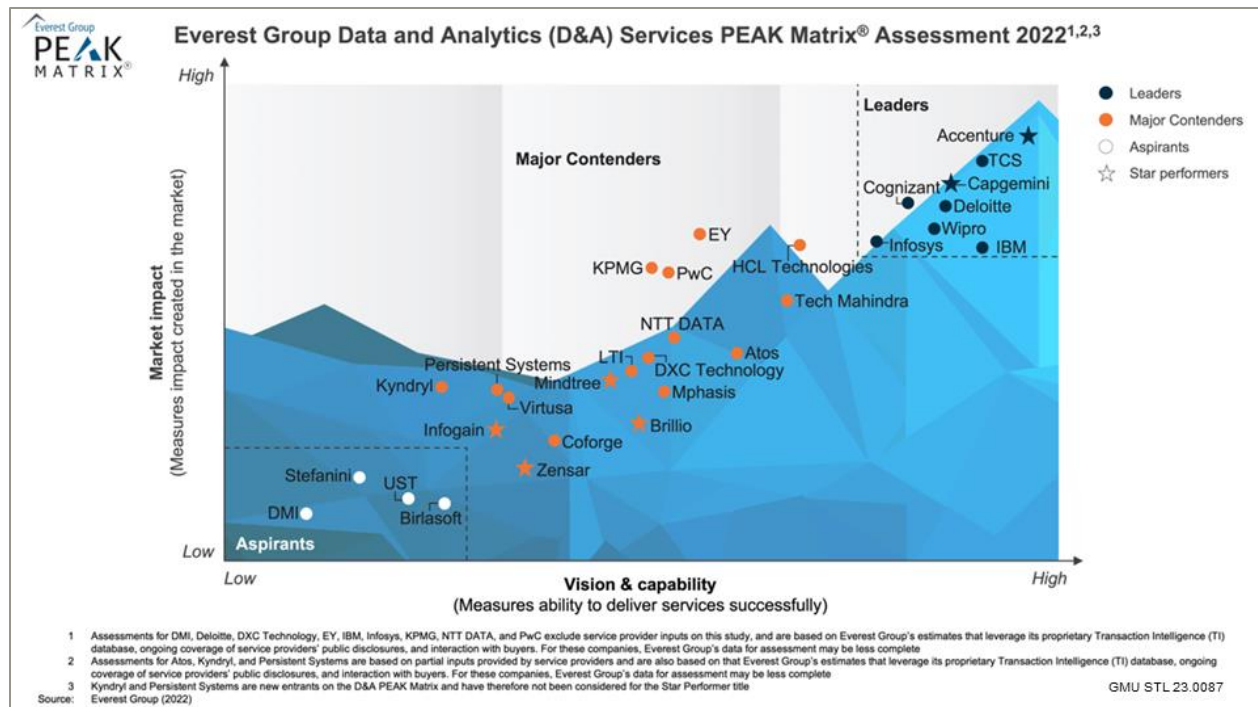
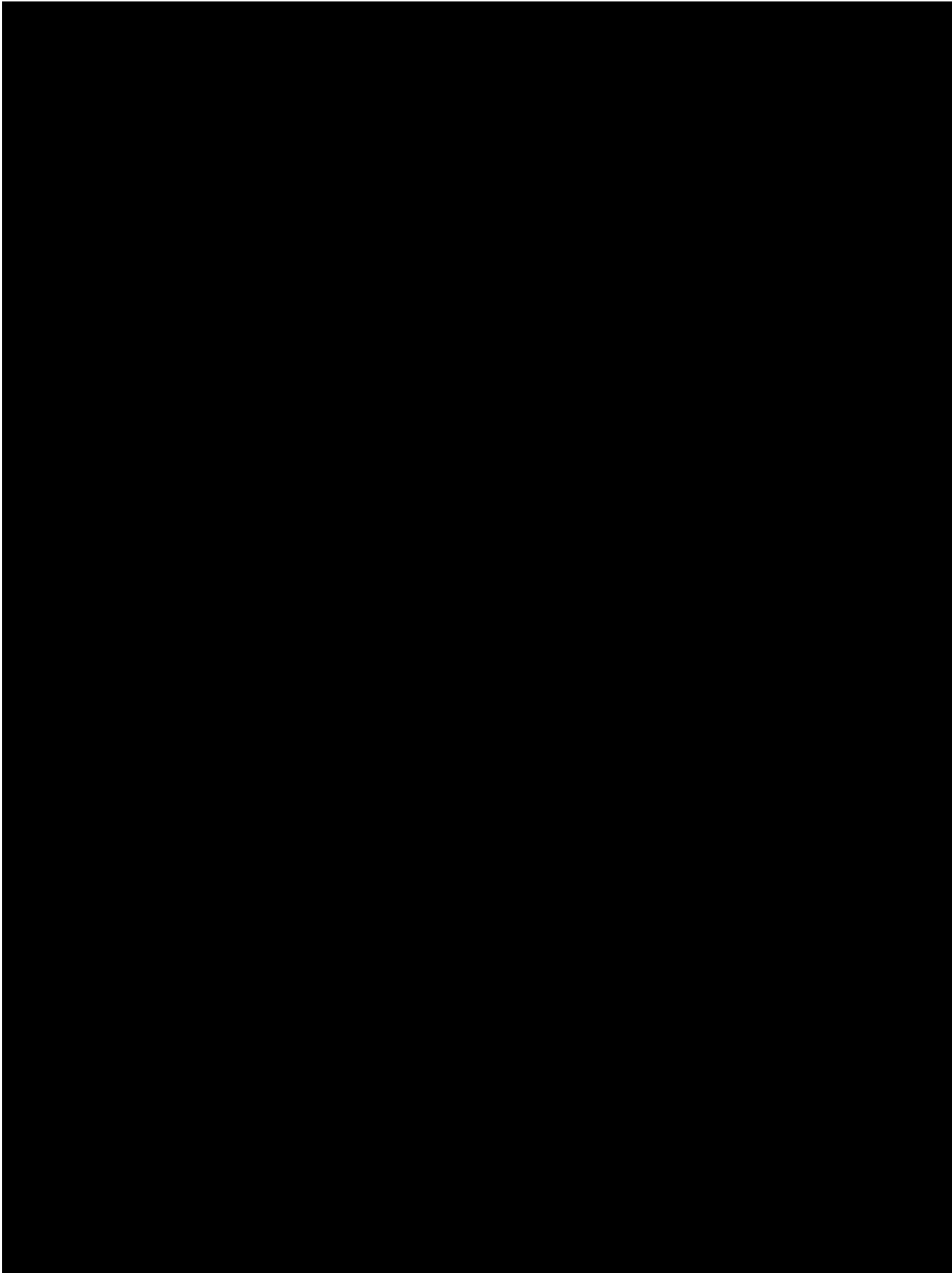


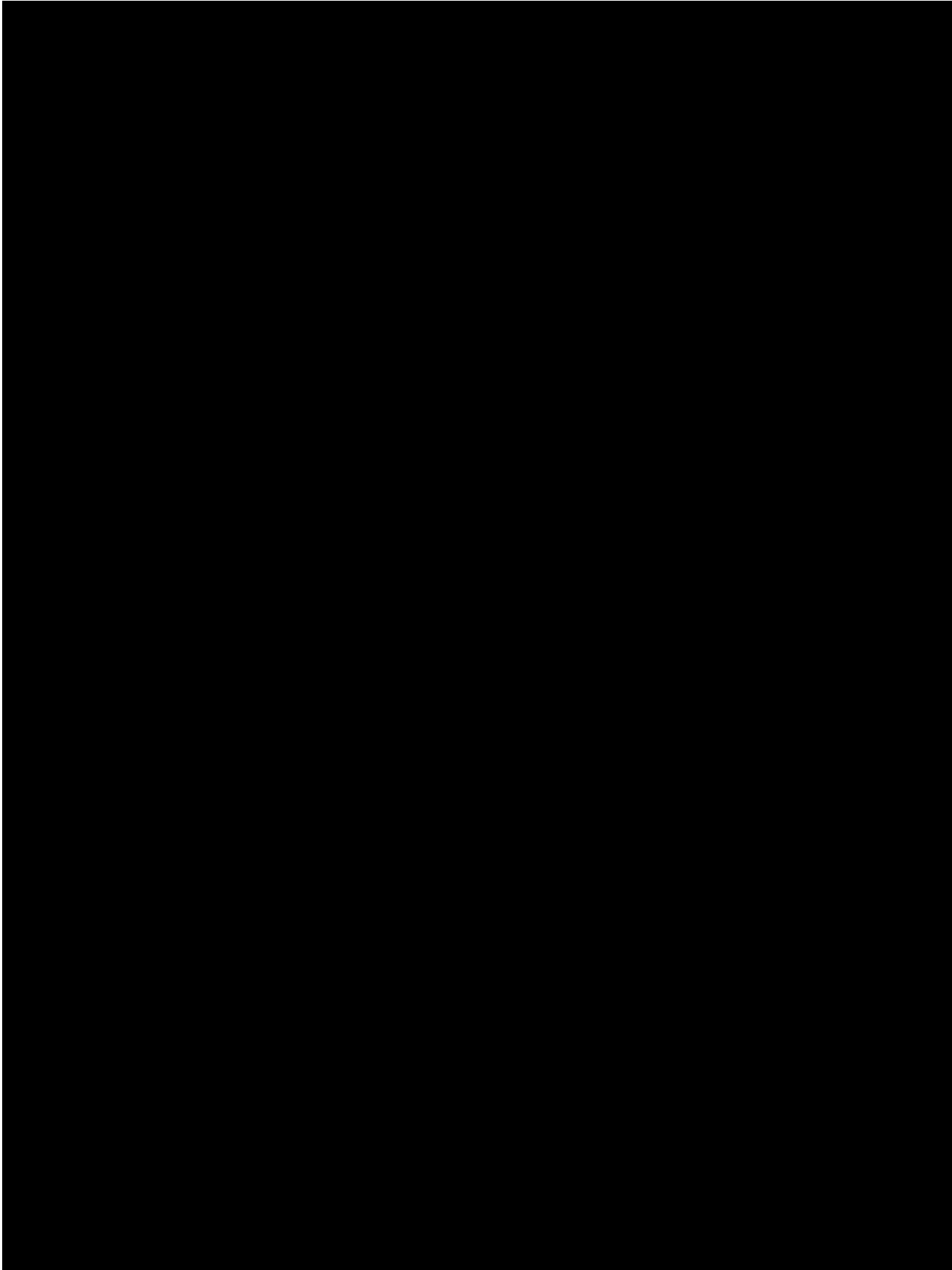
Figure 12. Accenture beat 17 competitors to the top spot as a result of our ability to execute and the completeness of our vision in this market, according to Gartner.

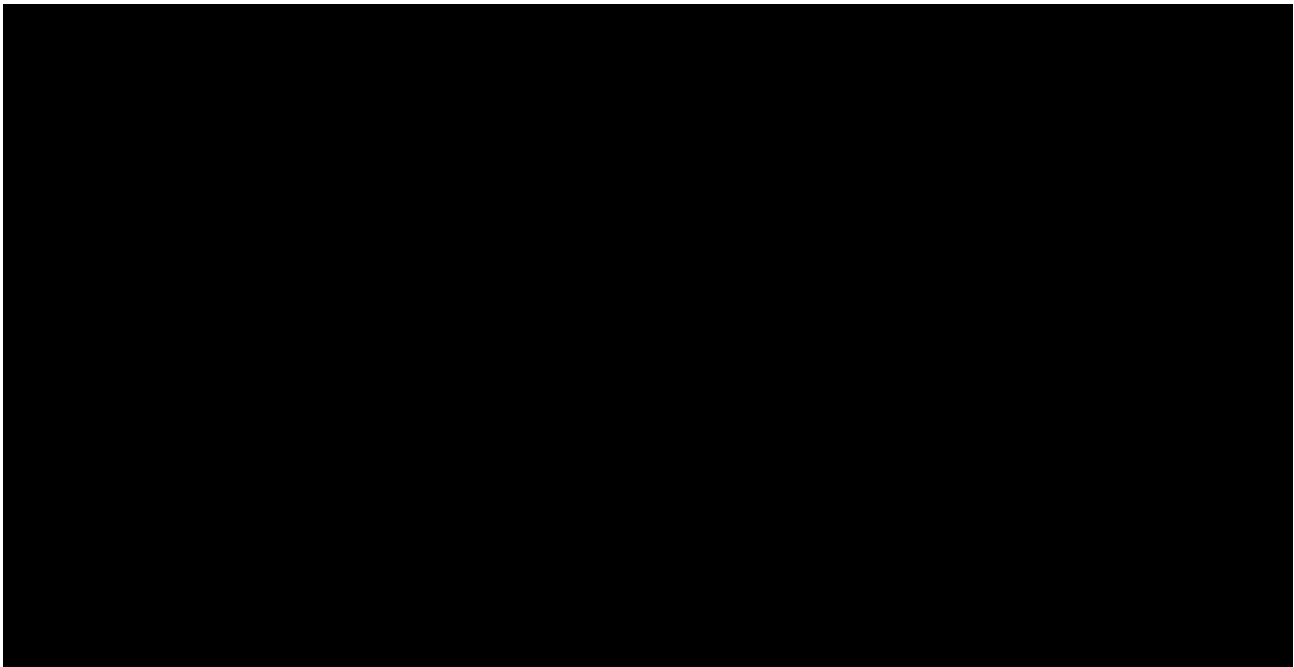
The report recognized our continued leadership in helping clients unlock new value through data-led IT transformations. Accenture harnesses our assets to address industry and functional areas such as talent and skilling, customer engagement and pricing. Gartner also recognized how rapidly Accenture is adding data partners to further expand our capabilities. Respondents to Gartner's survey recommended Accenture because of our ability to improve business outcomes, compliance and risk management, and customer relations, and the fact we drive innovation and revenue growth, and reduce time to market.

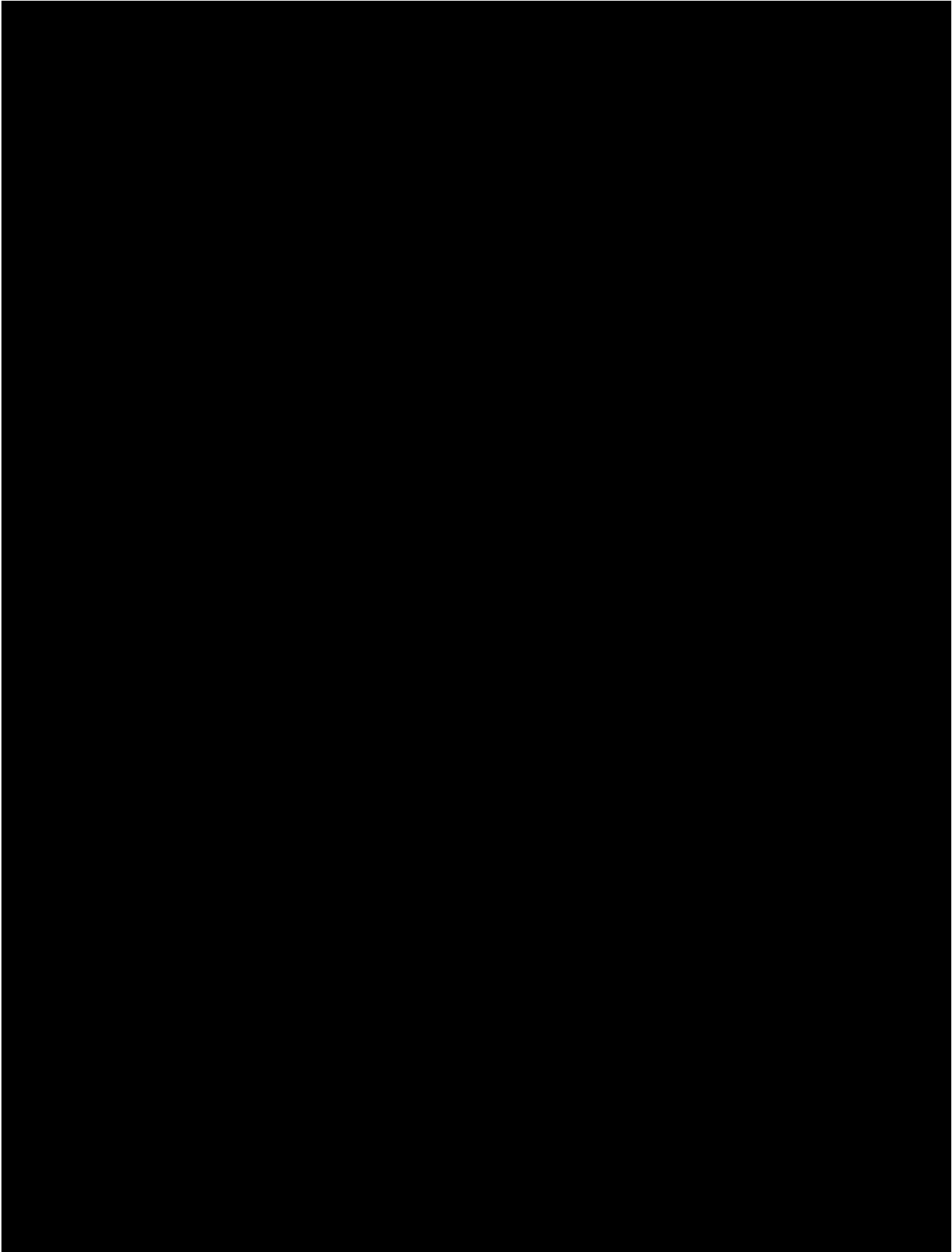


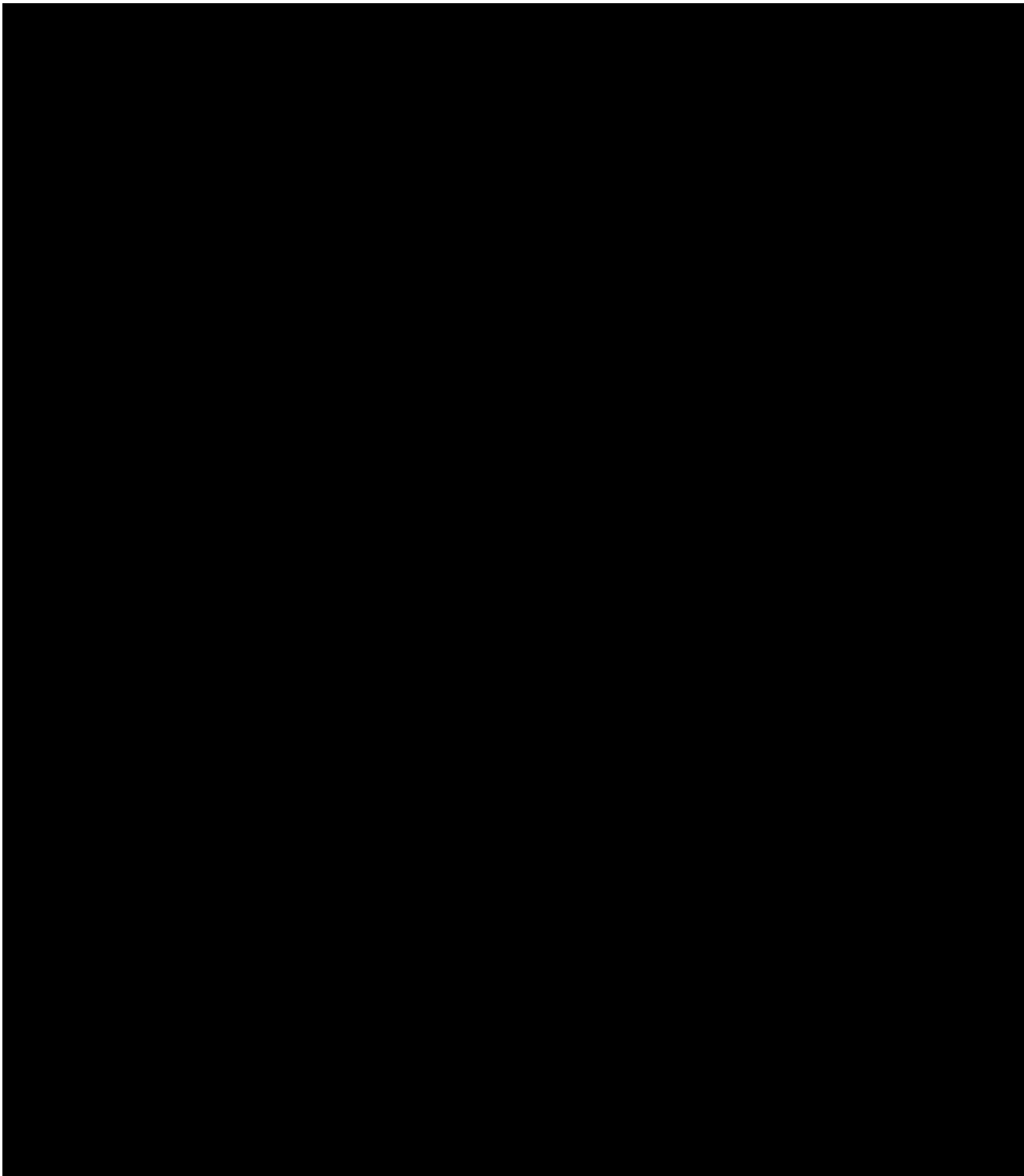
Service Needs Section 10.2 - The Contractor must provide the Vital Positions described in the following table for this Contract. NOTE: add language around expected Salesforce experience AND awareness with new functionality in upcoming releases.

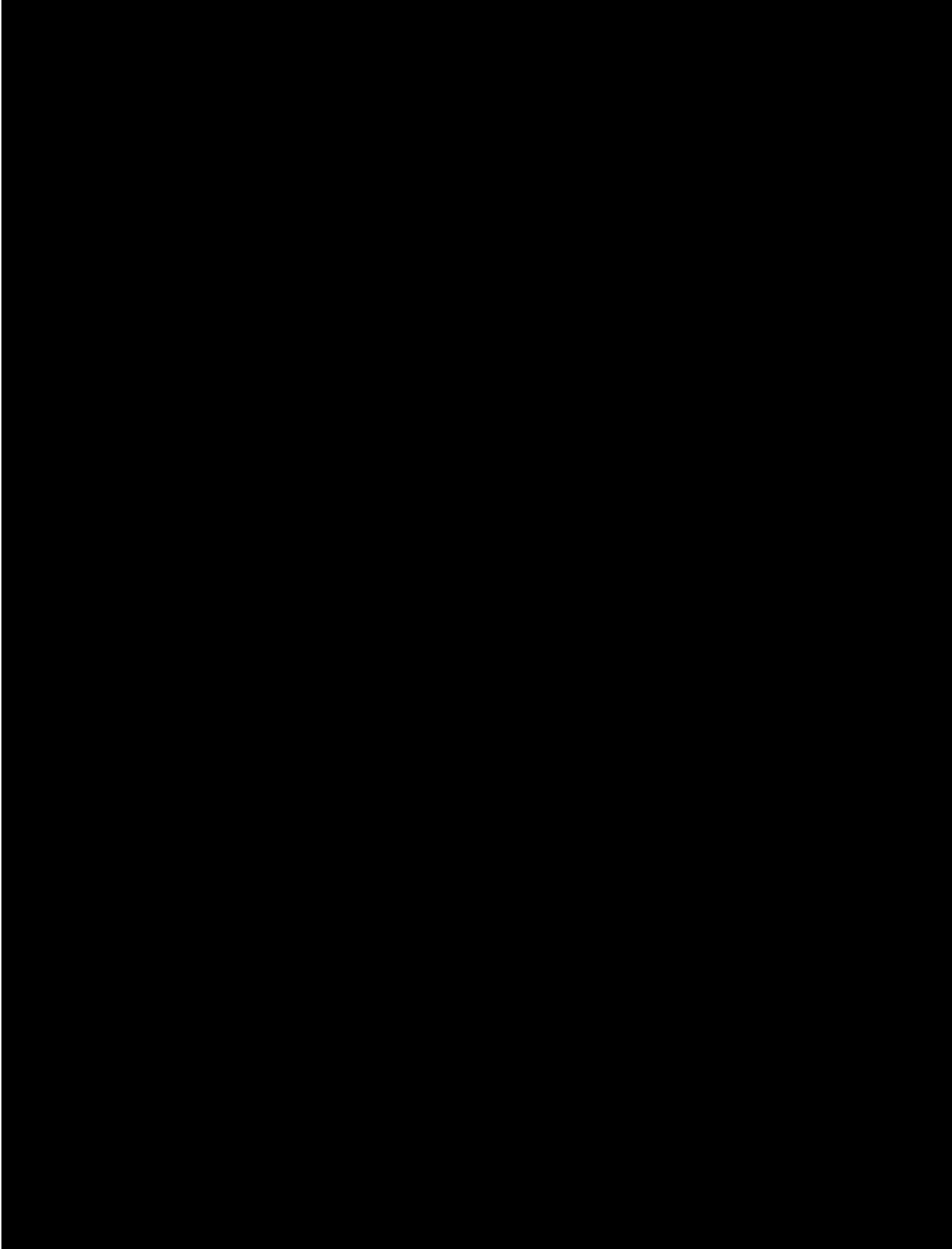
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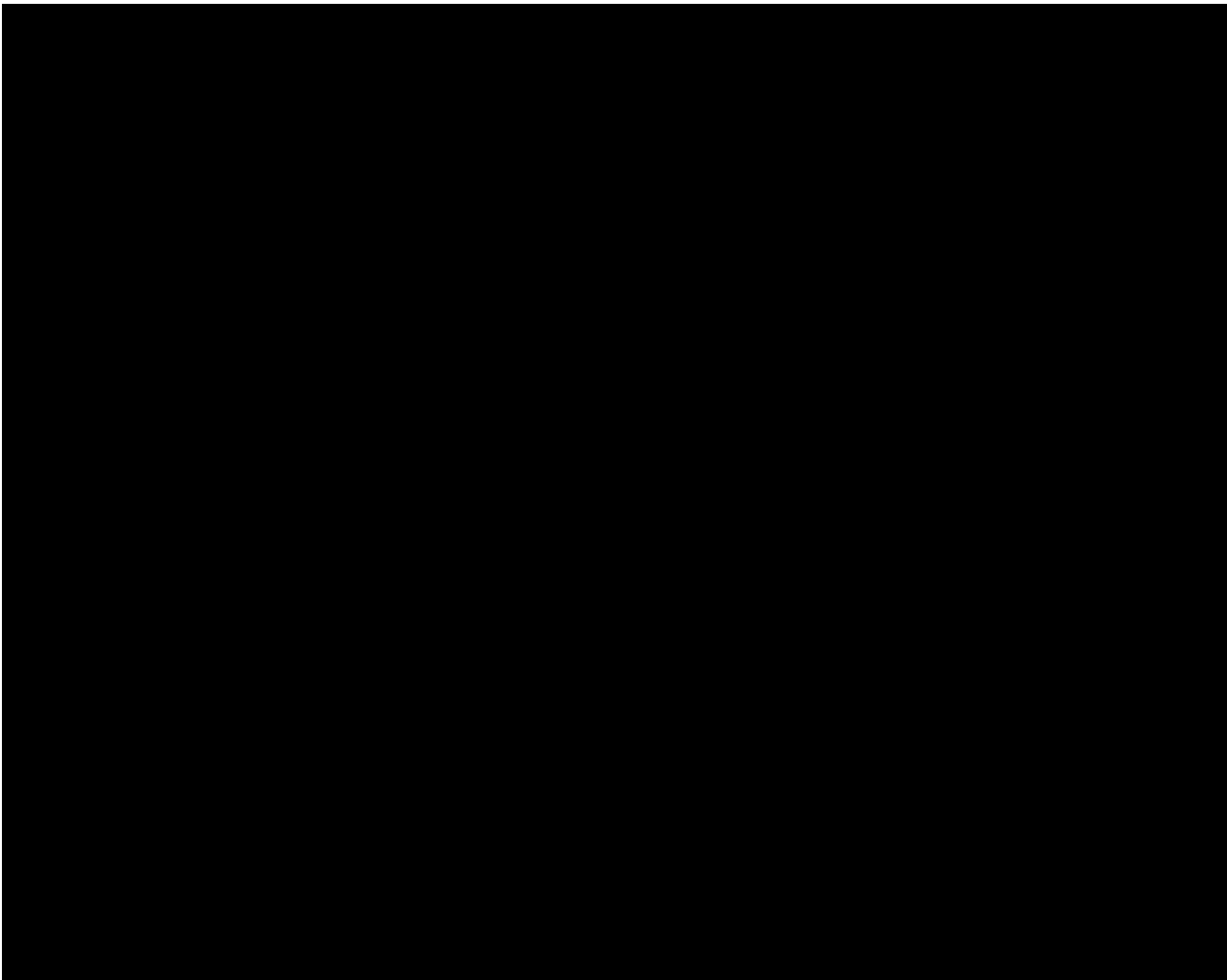


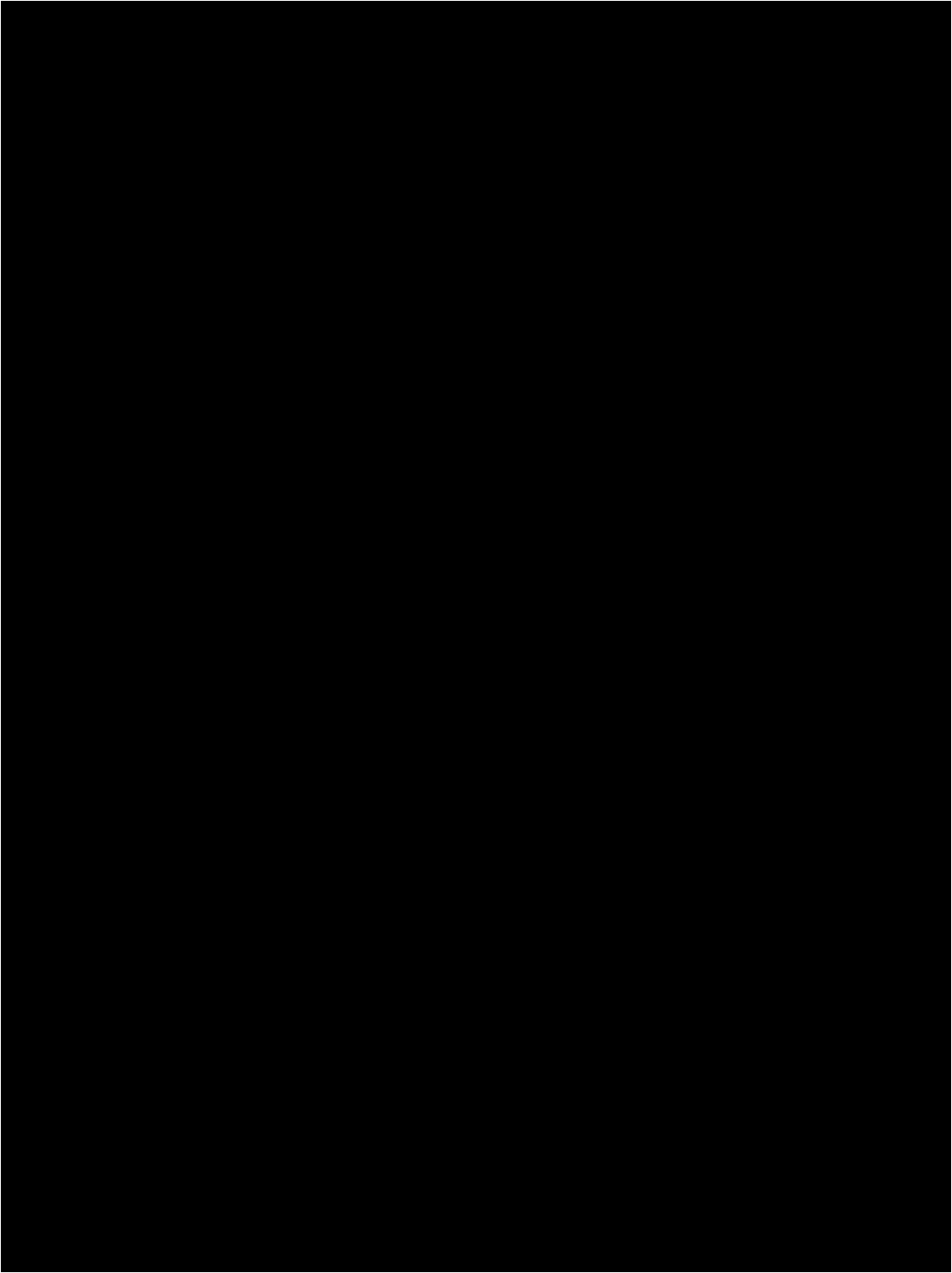


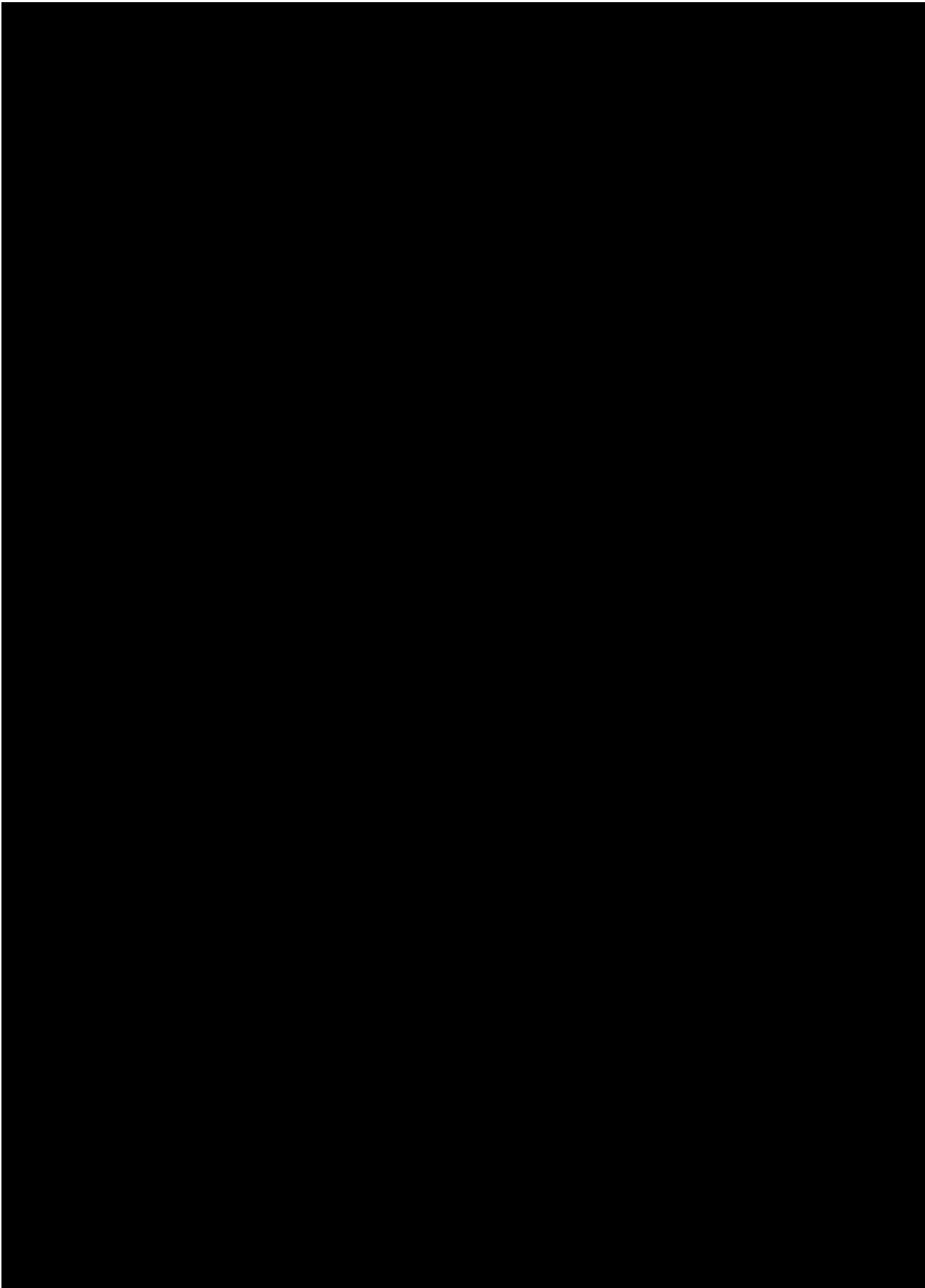


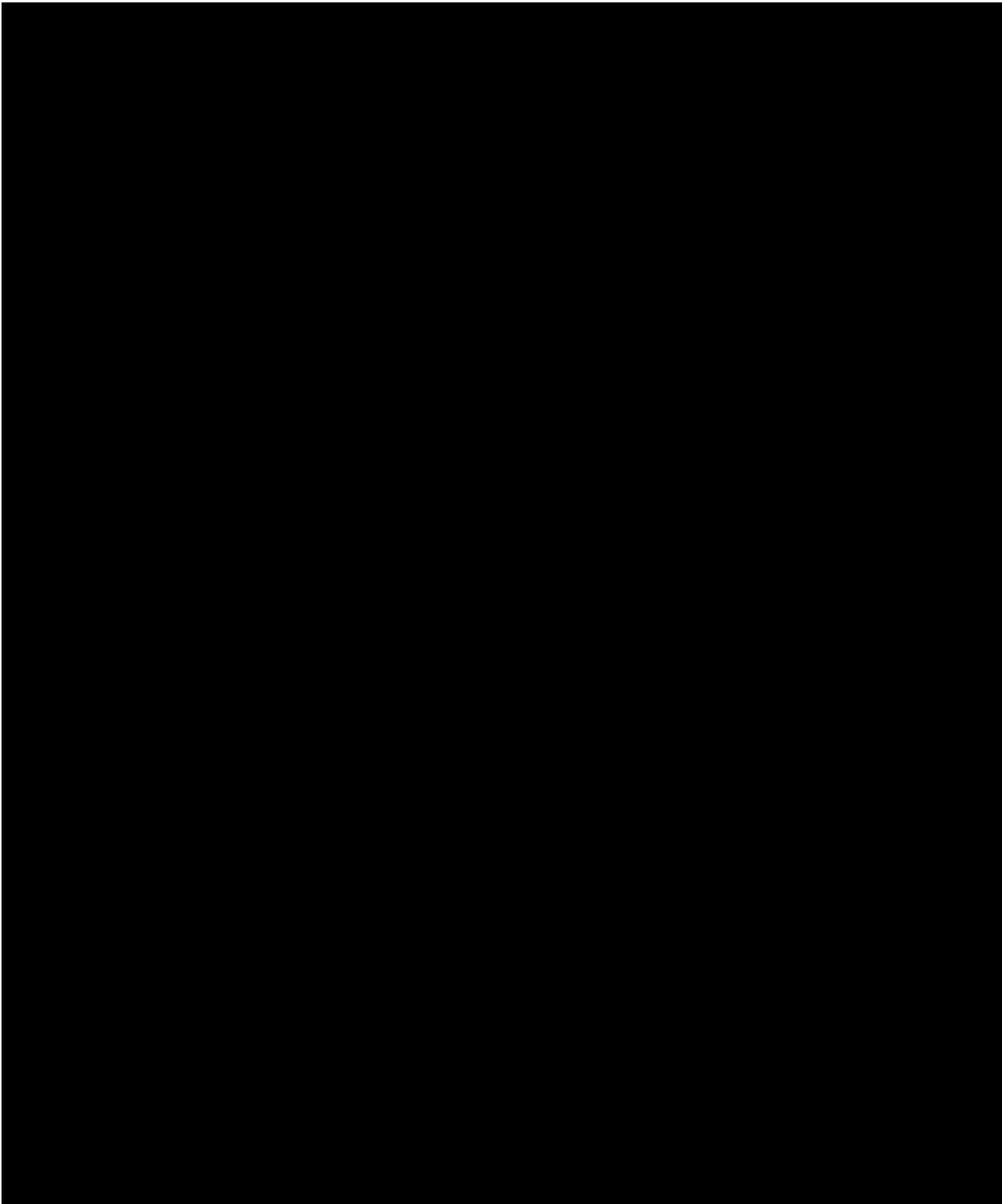


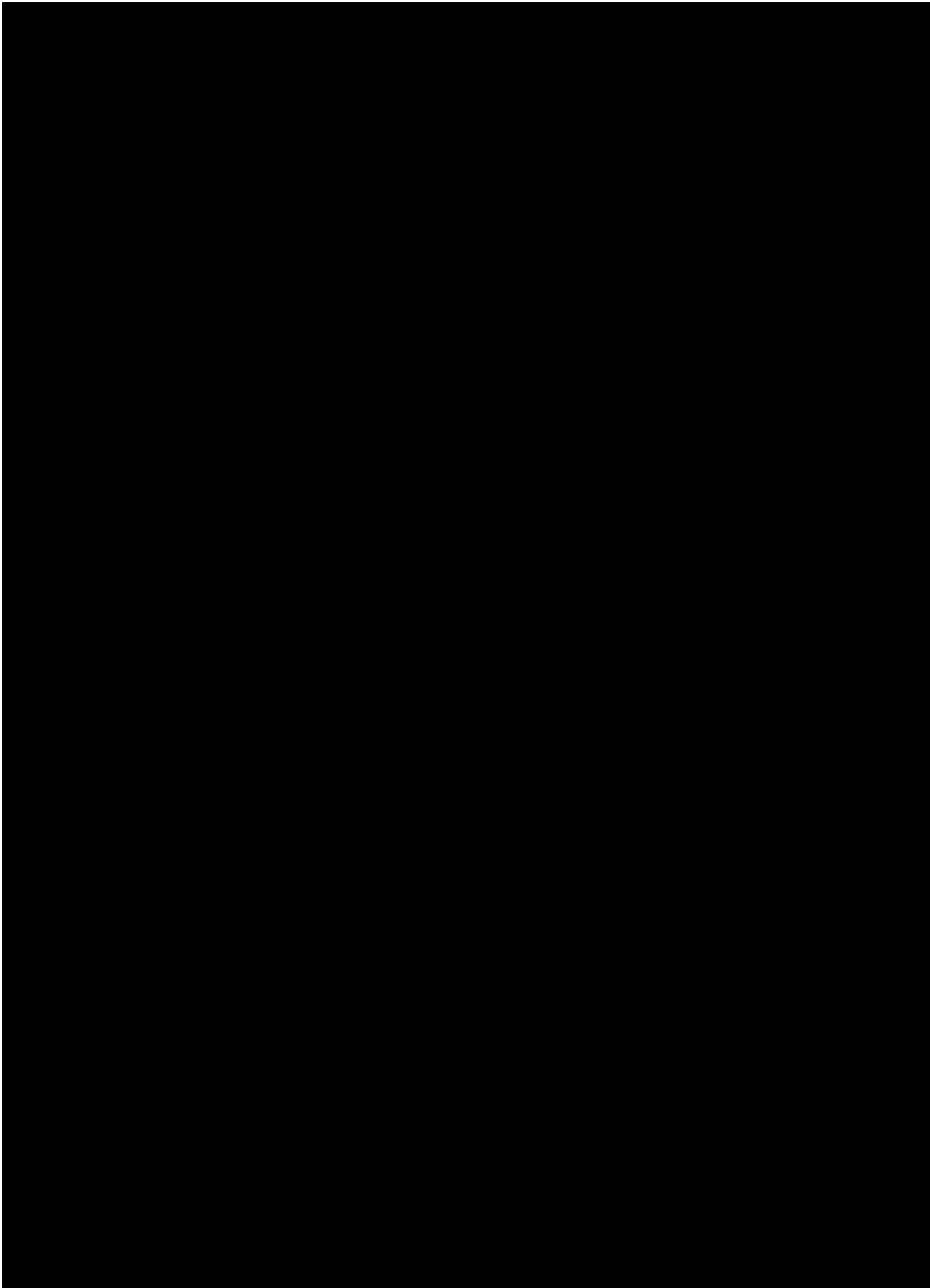


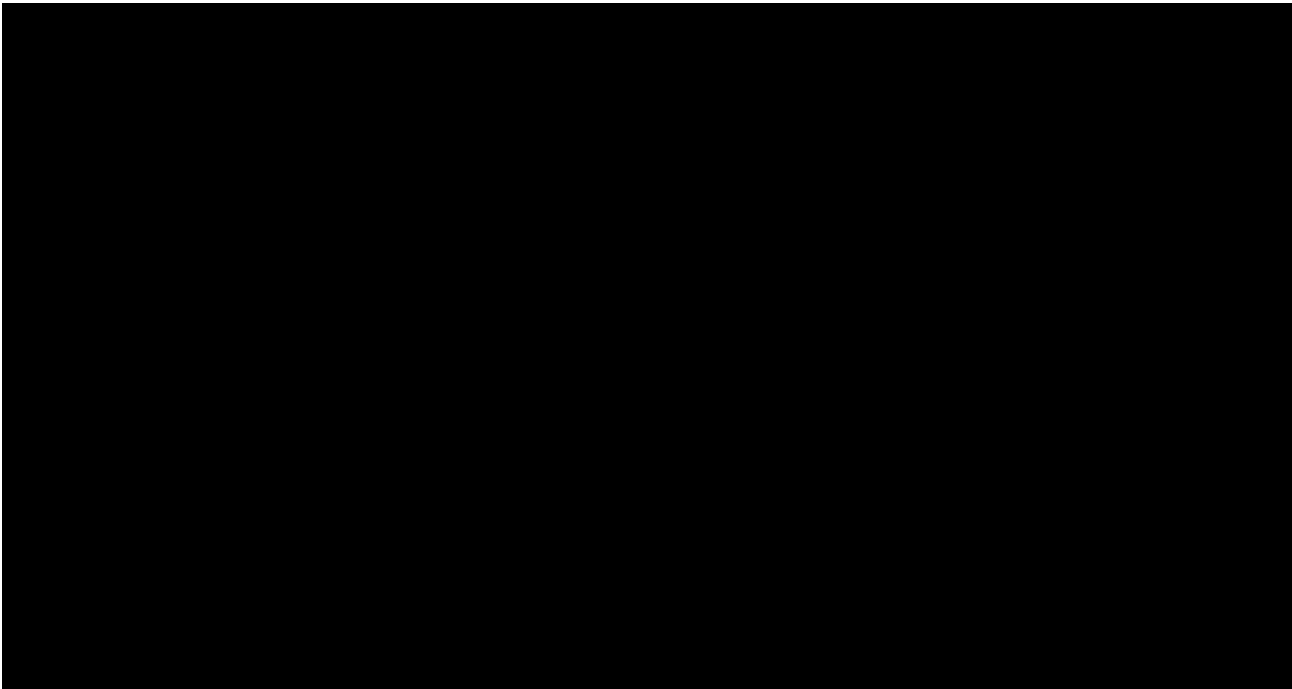


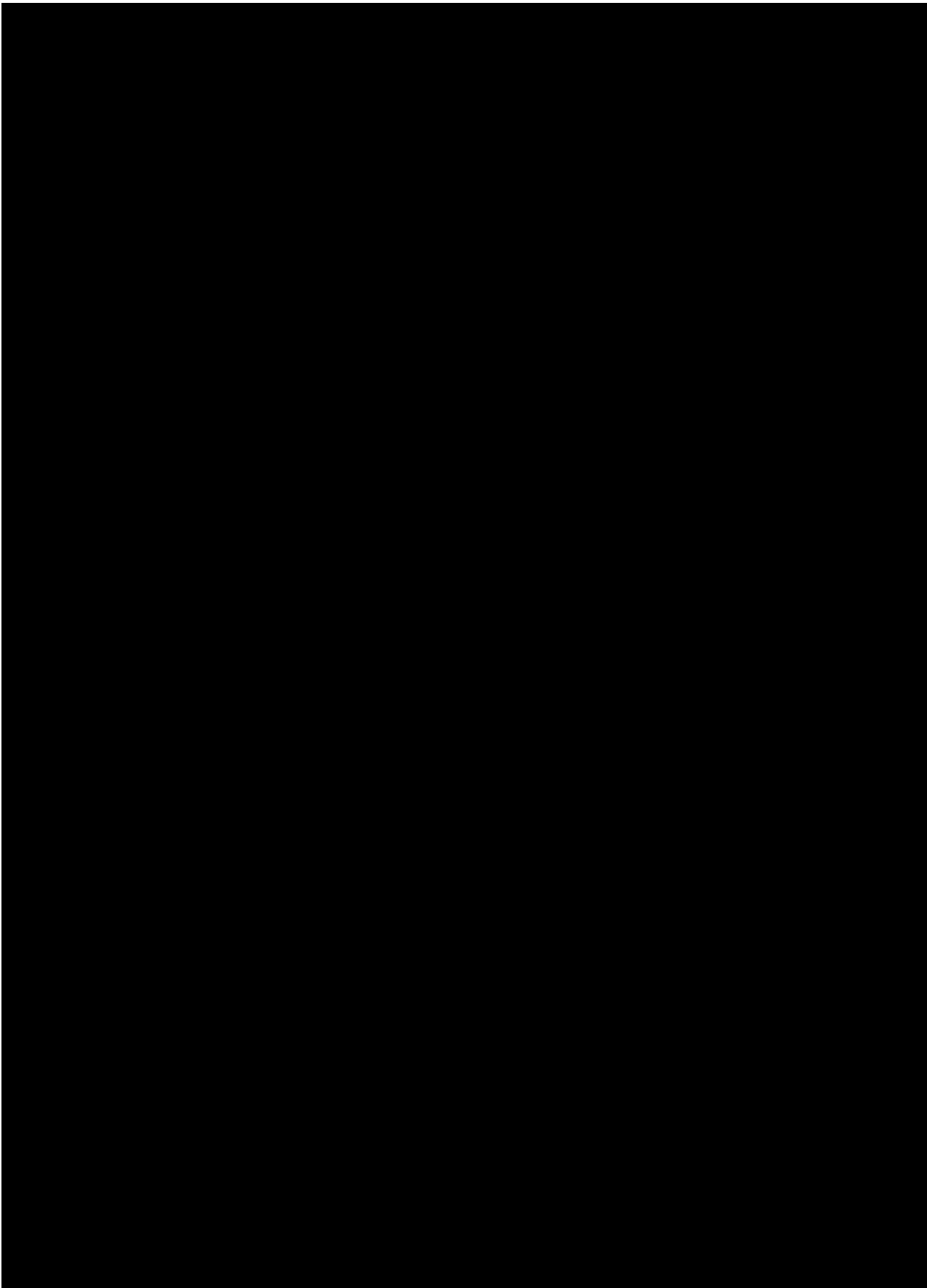


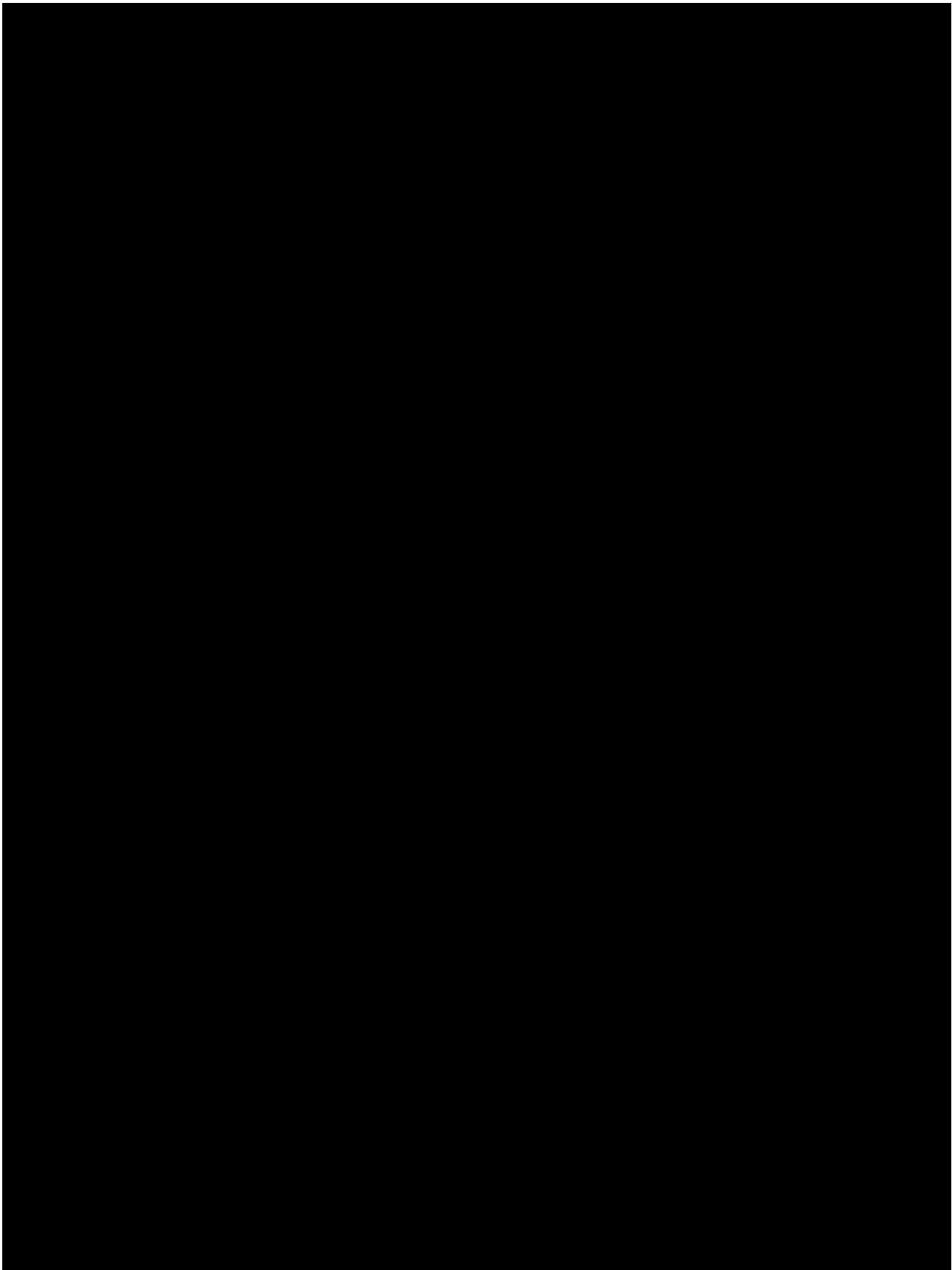


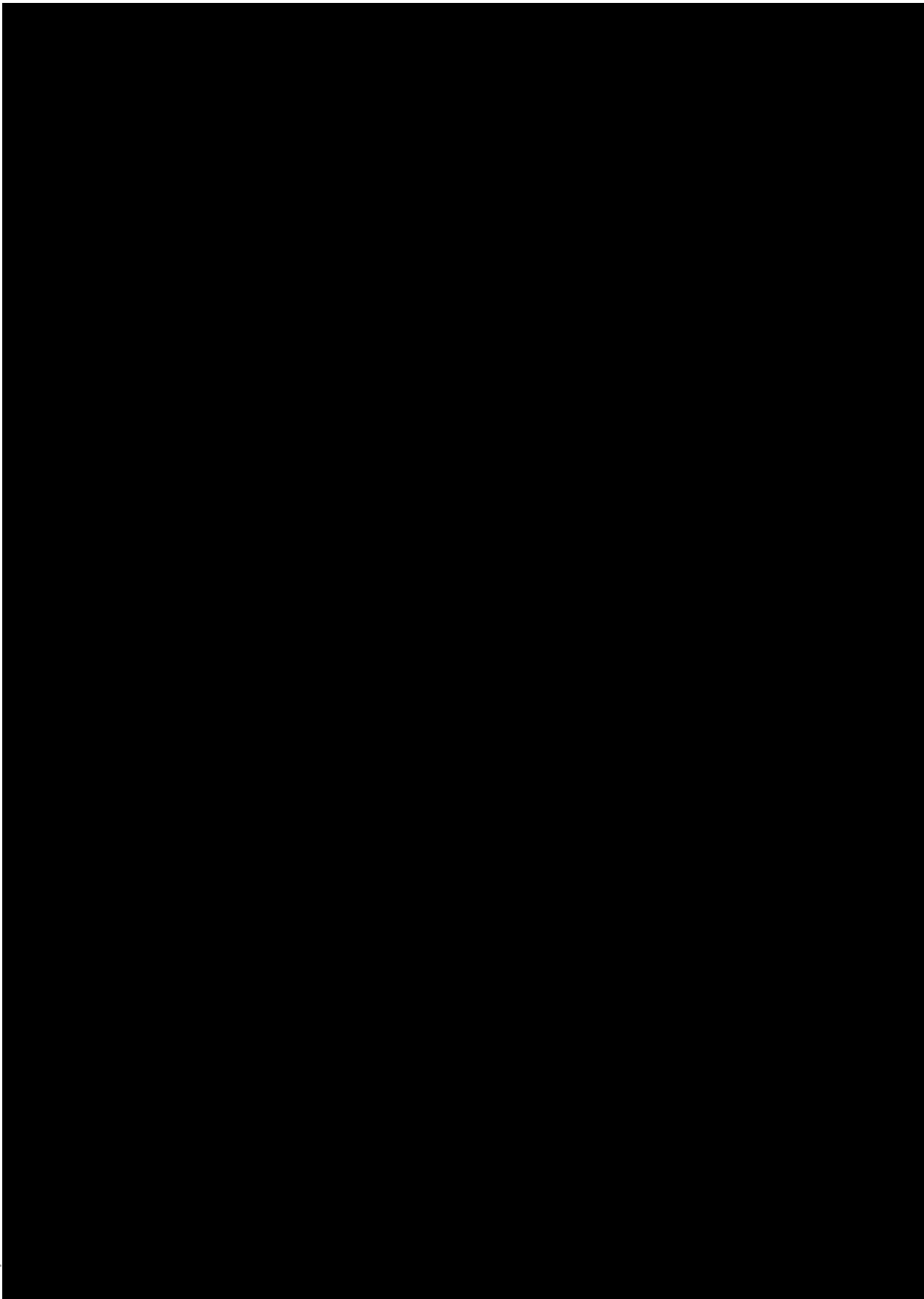


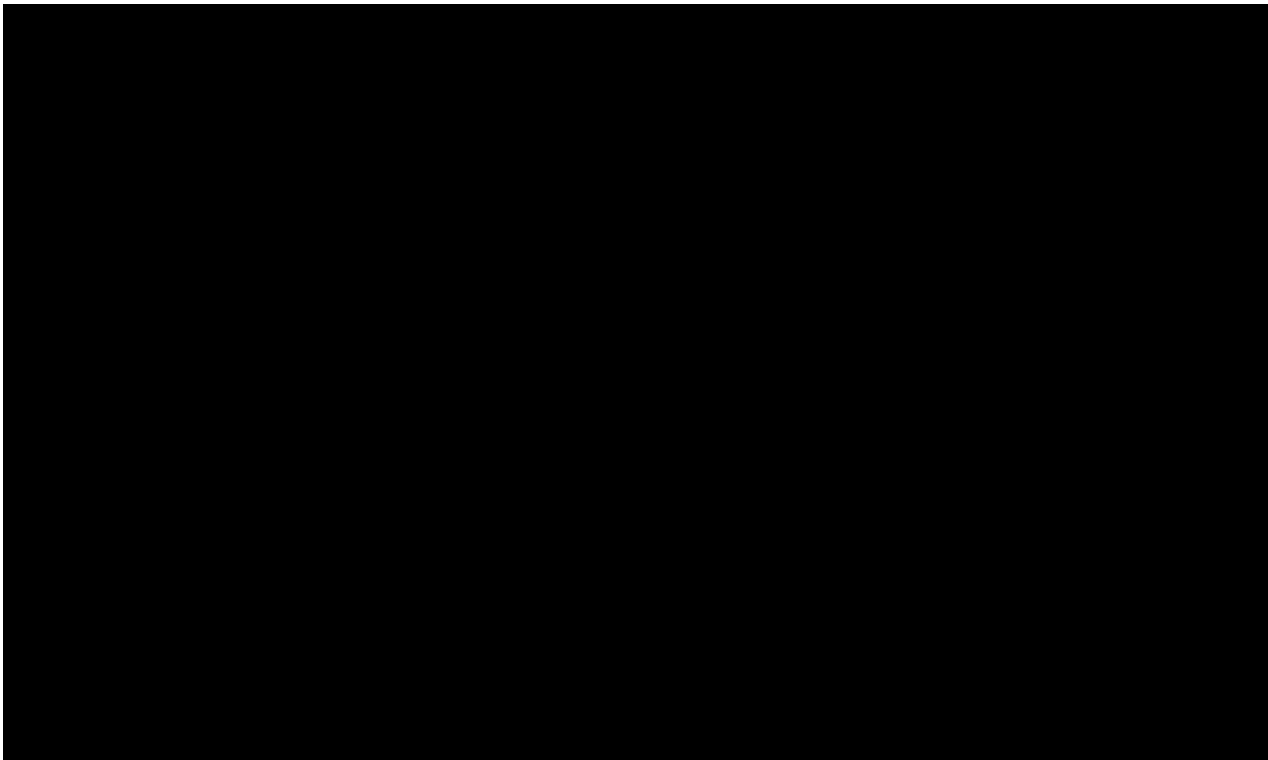


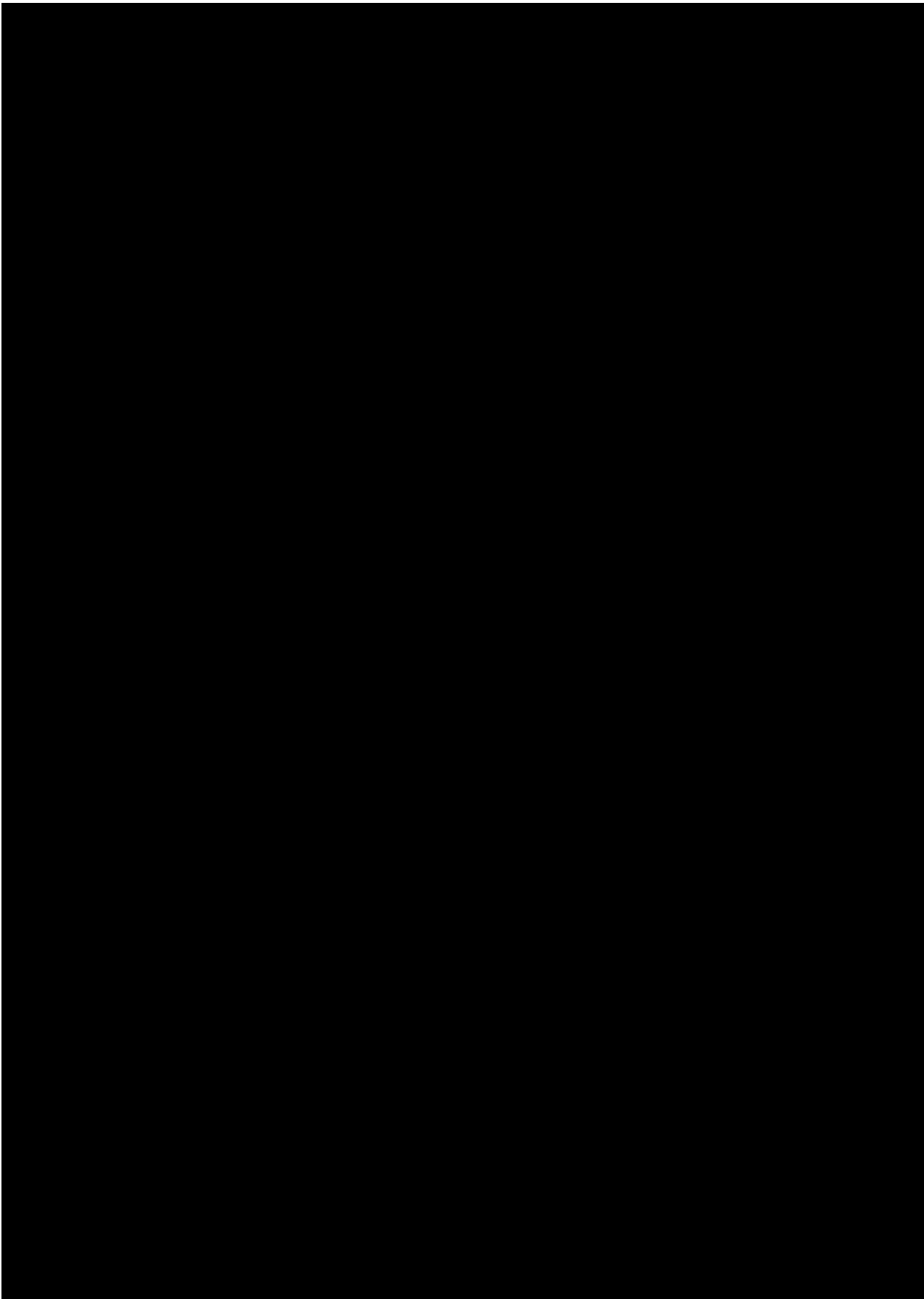


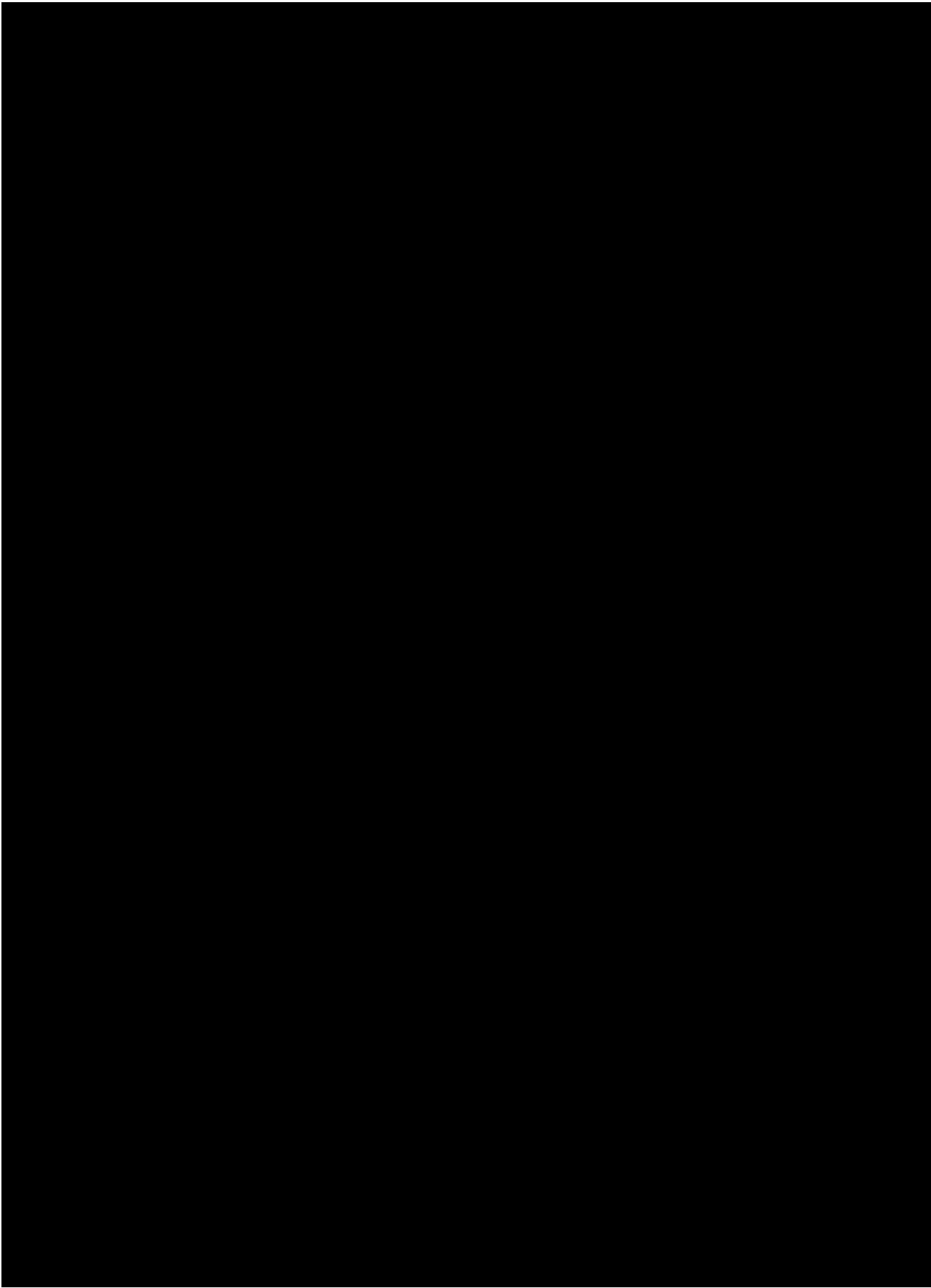


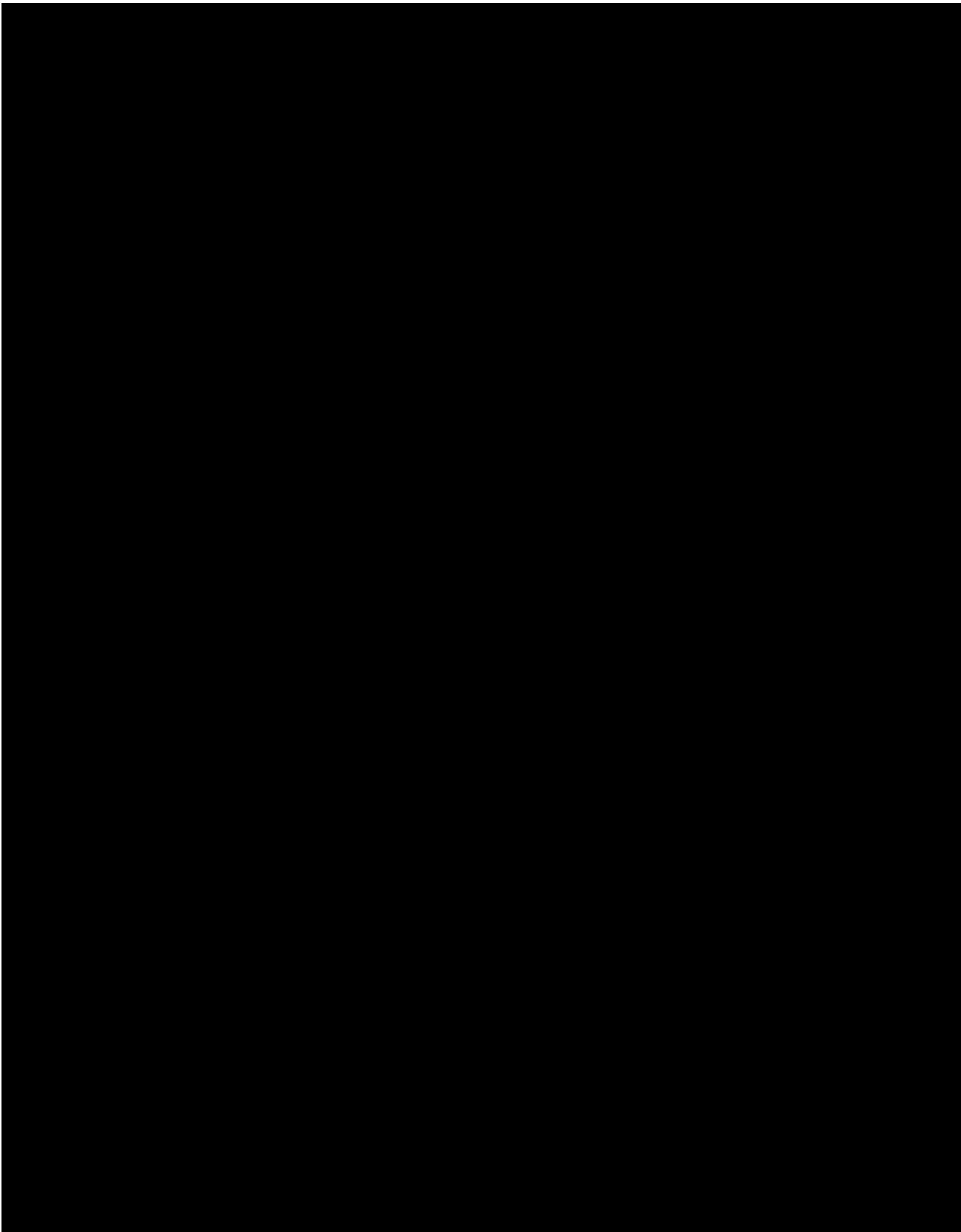


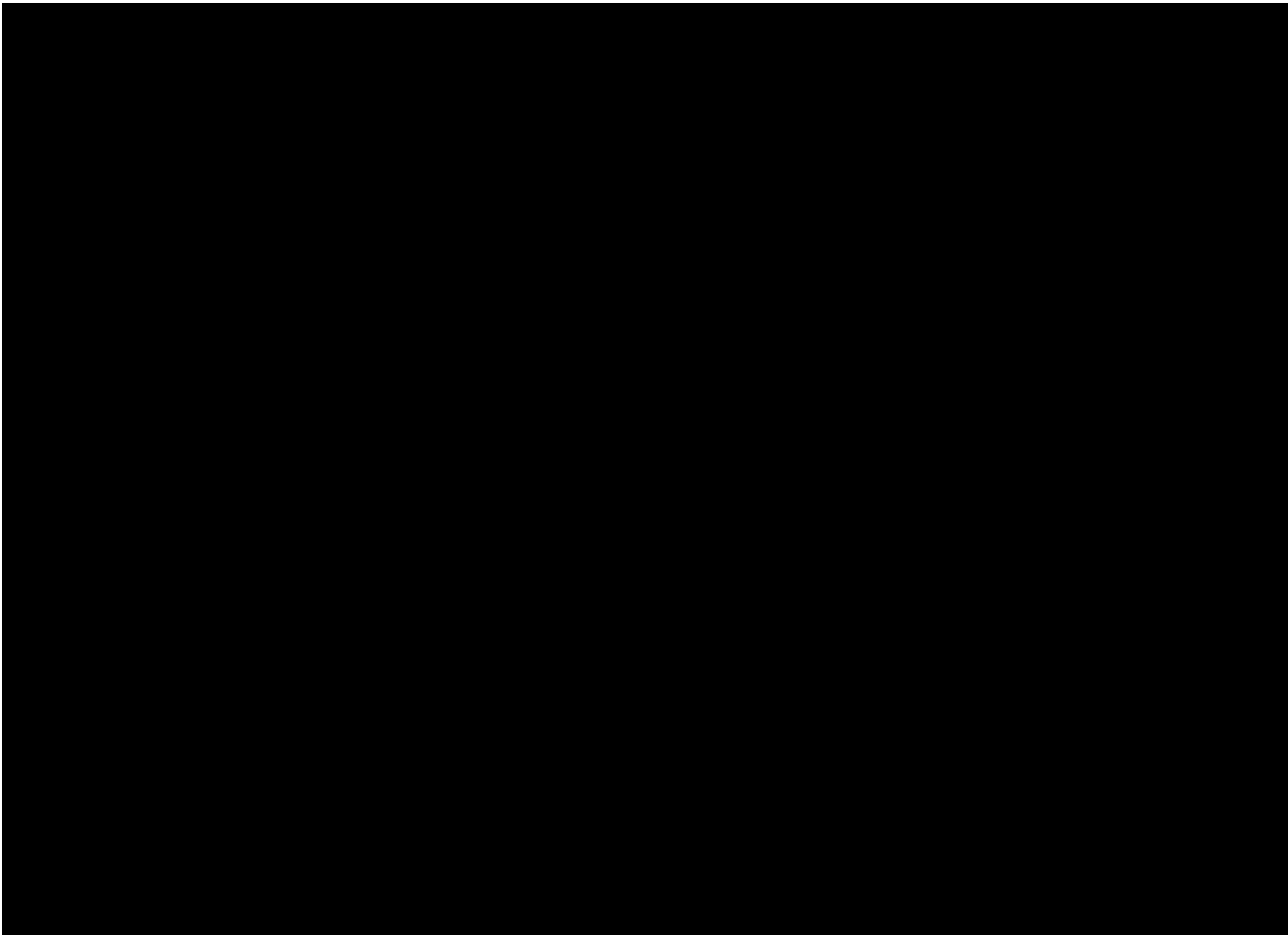


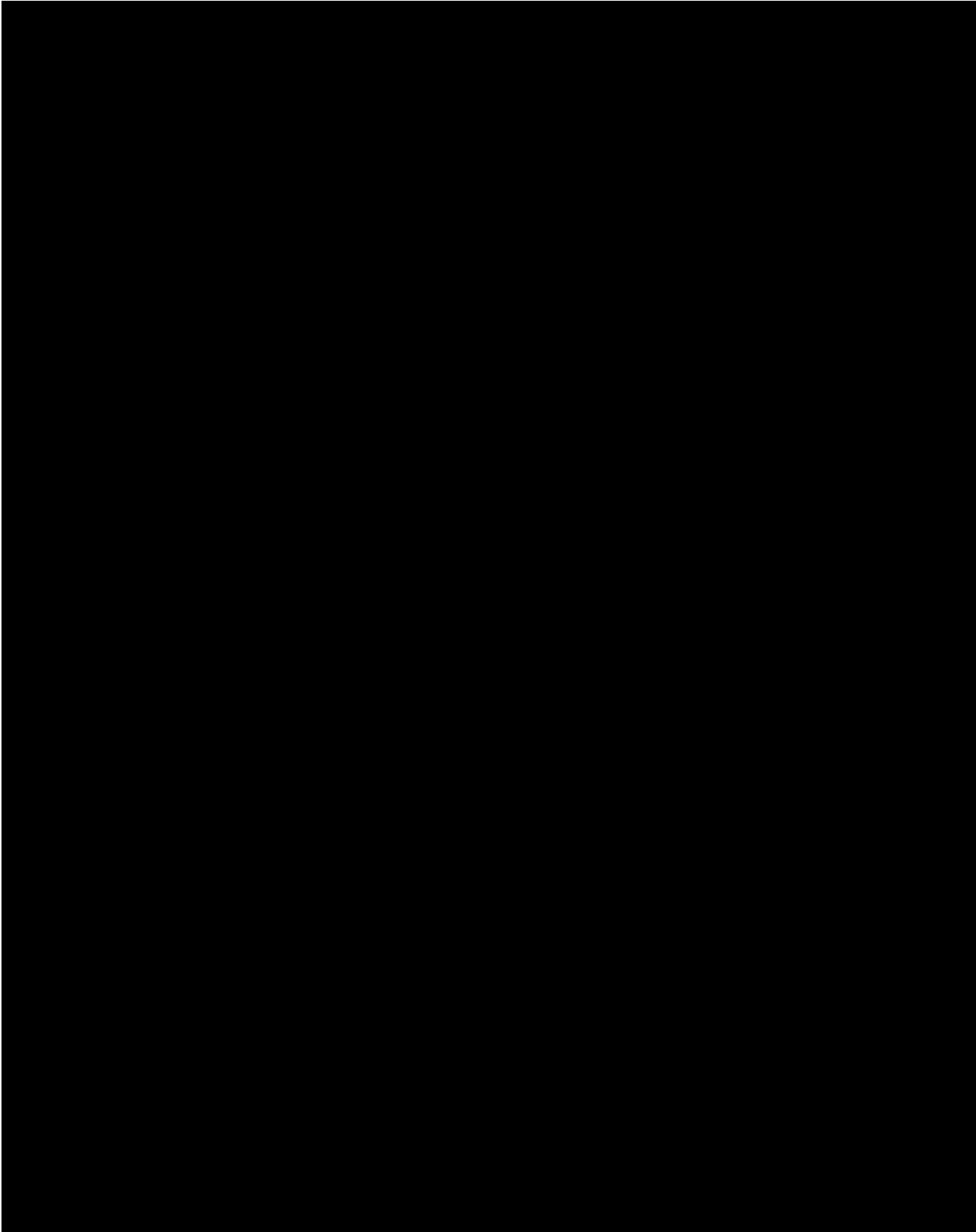


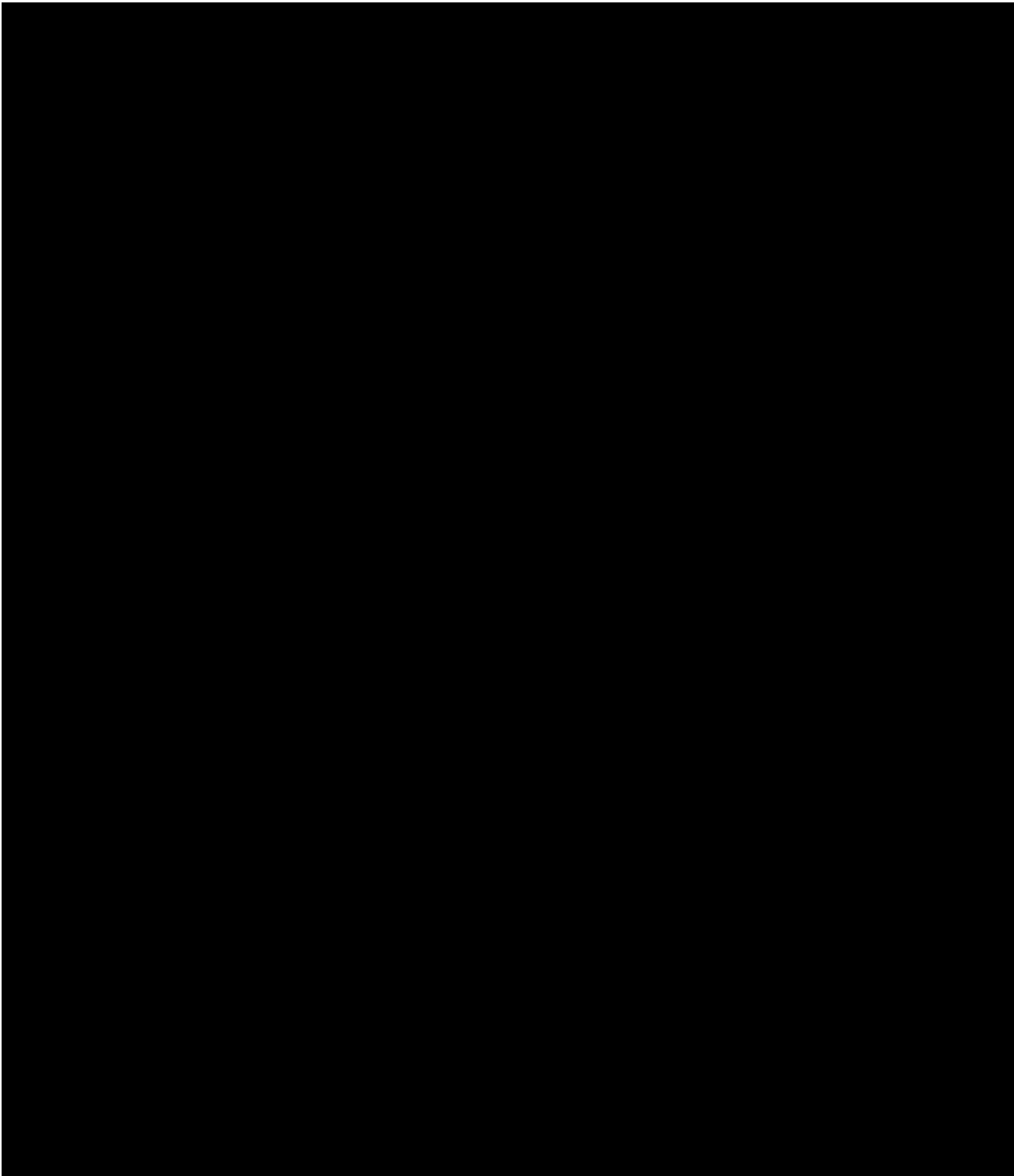


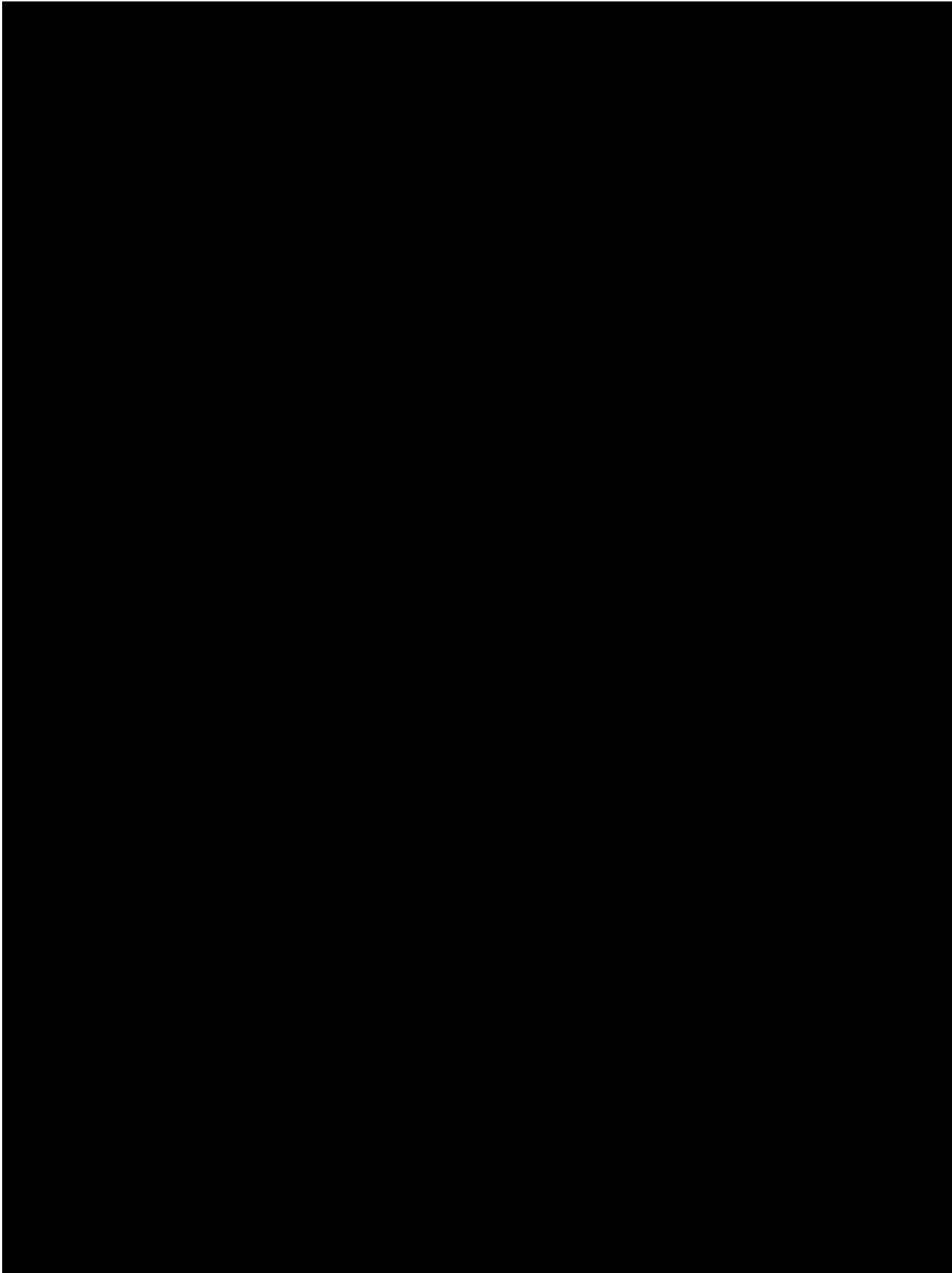


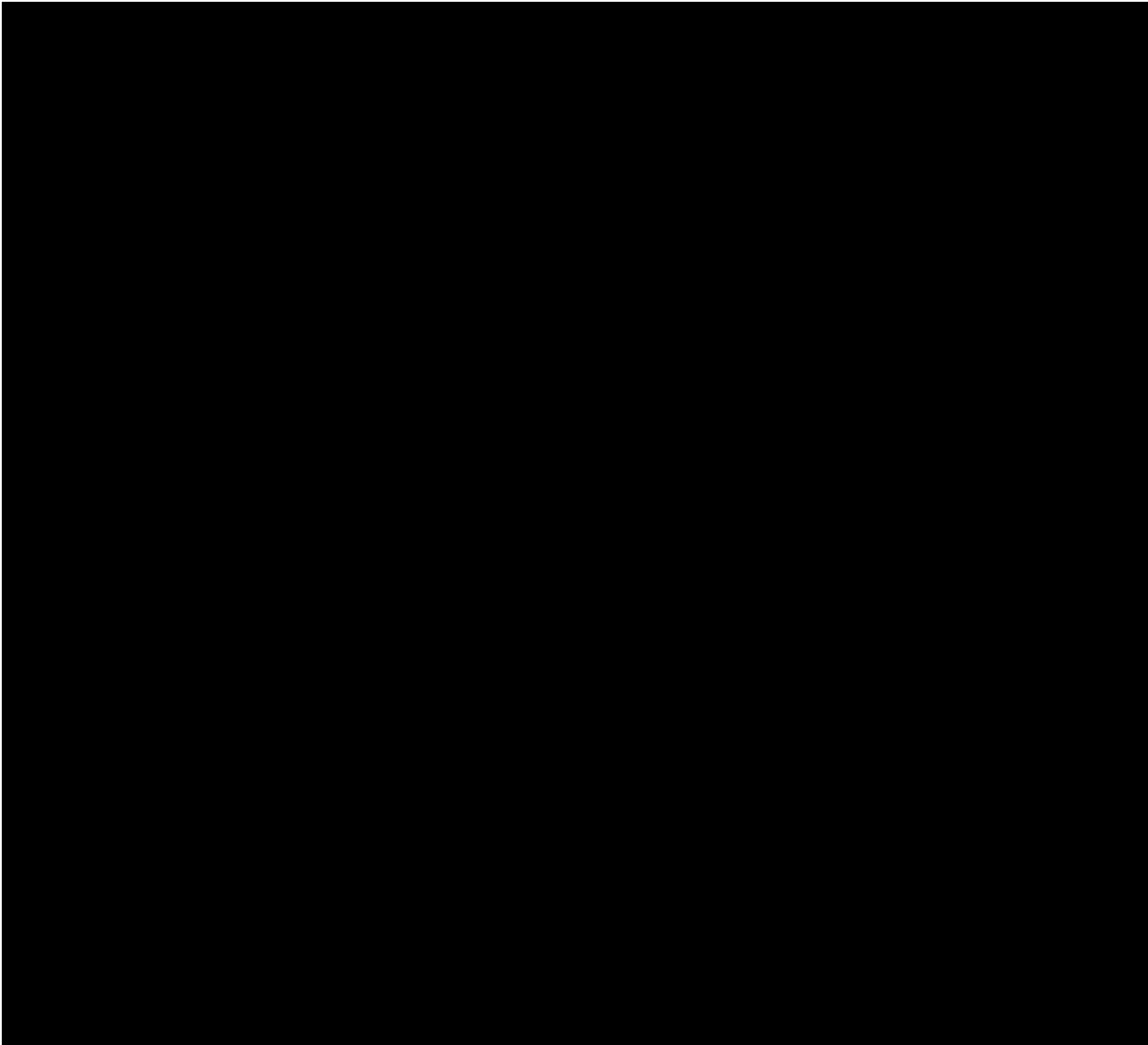


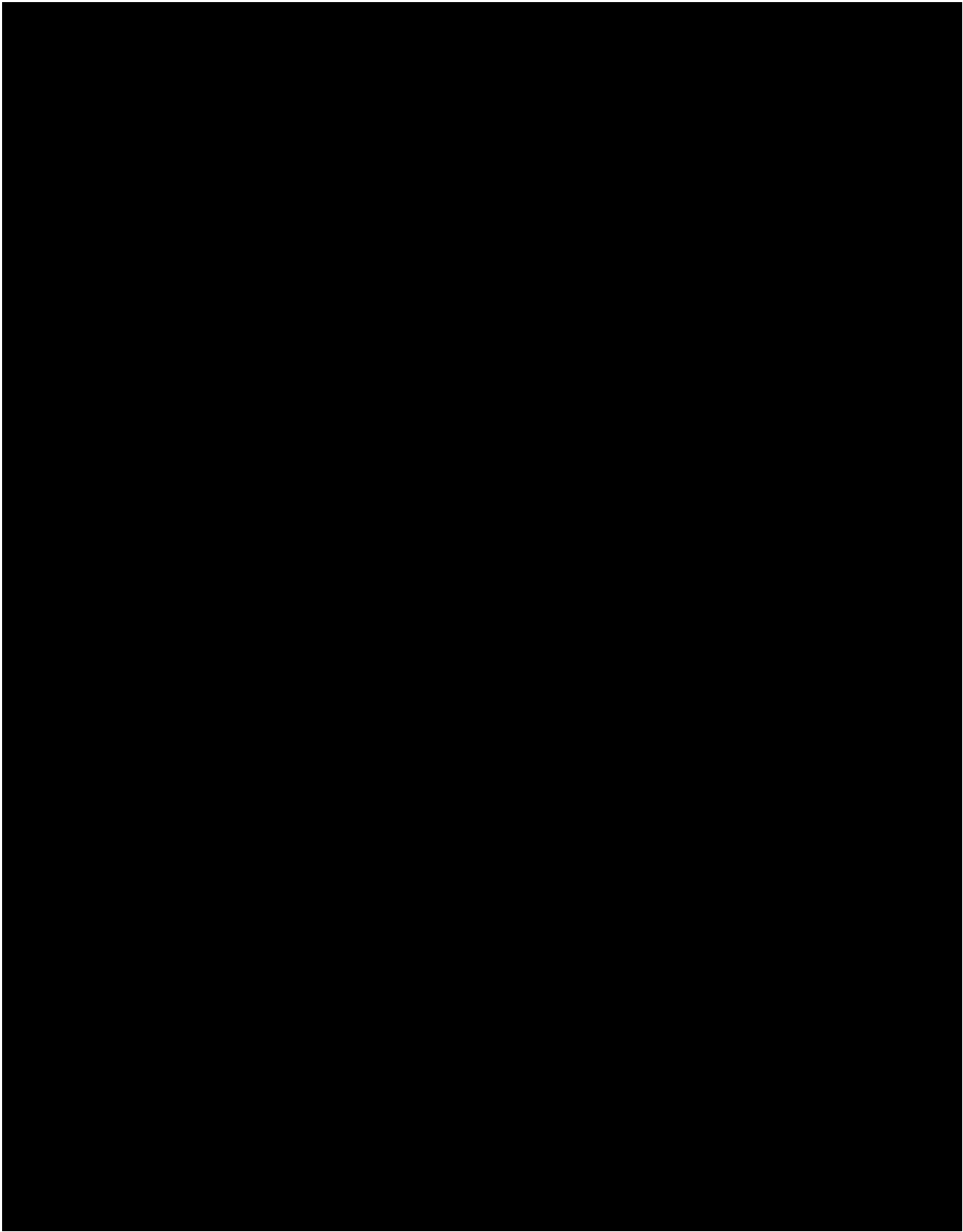


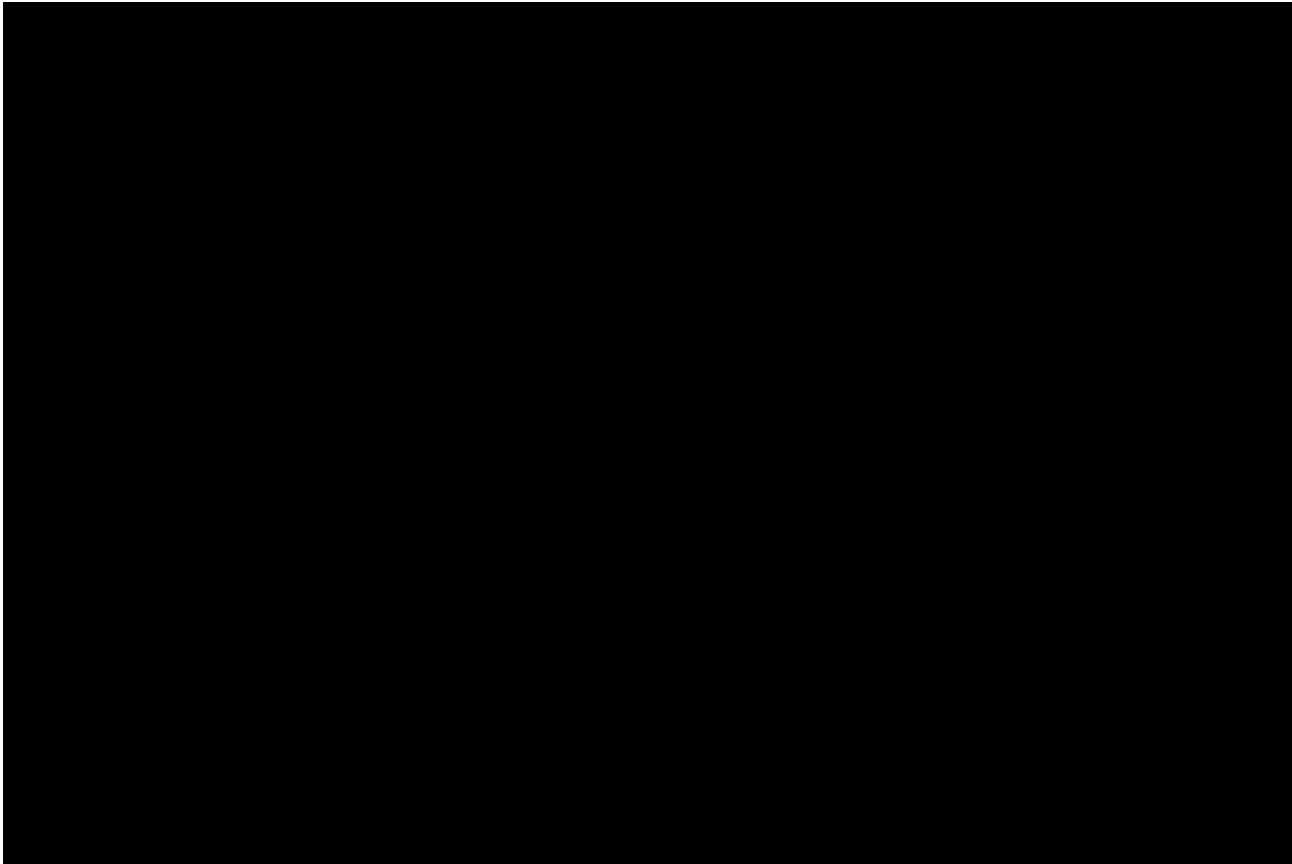


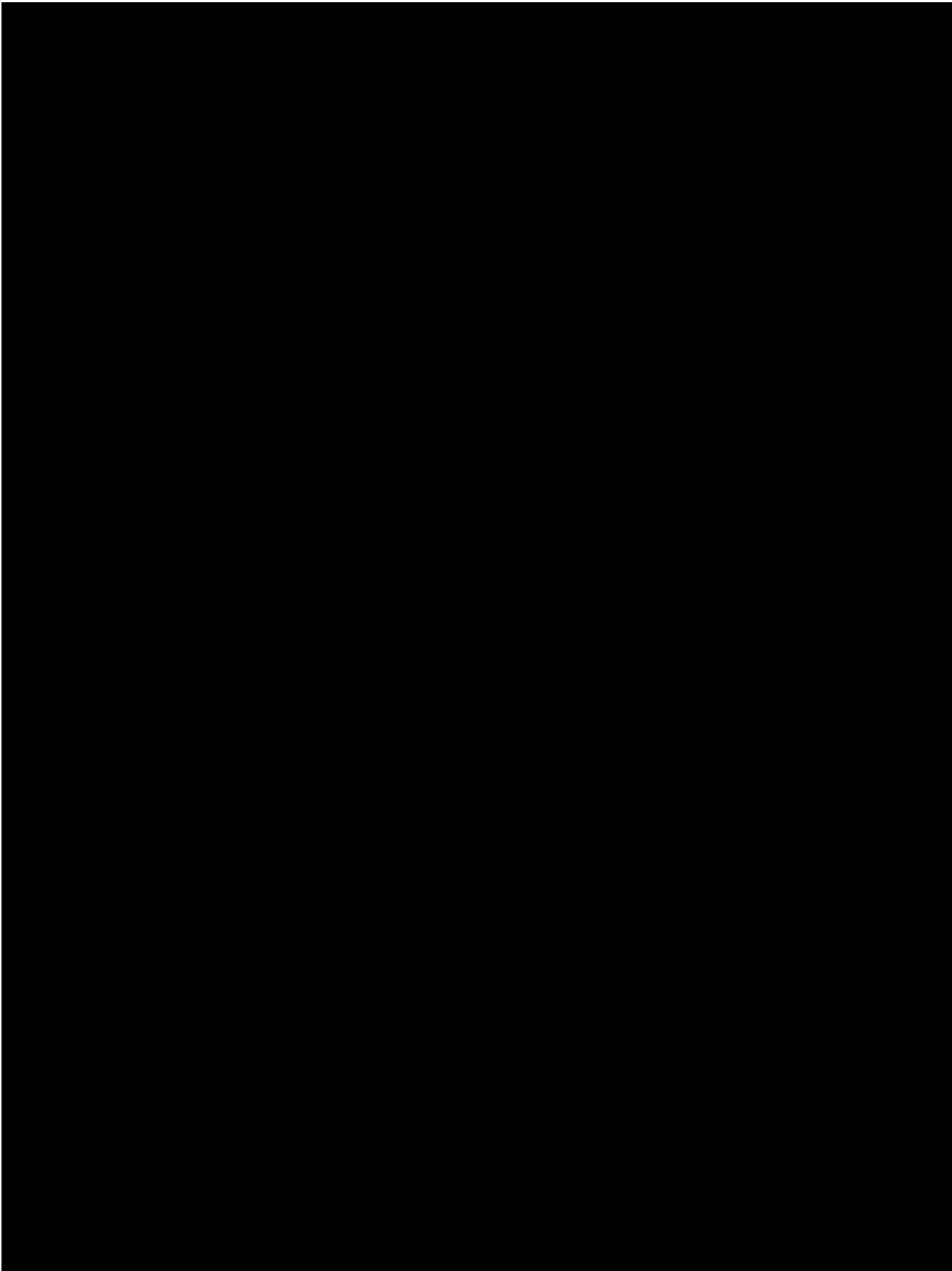


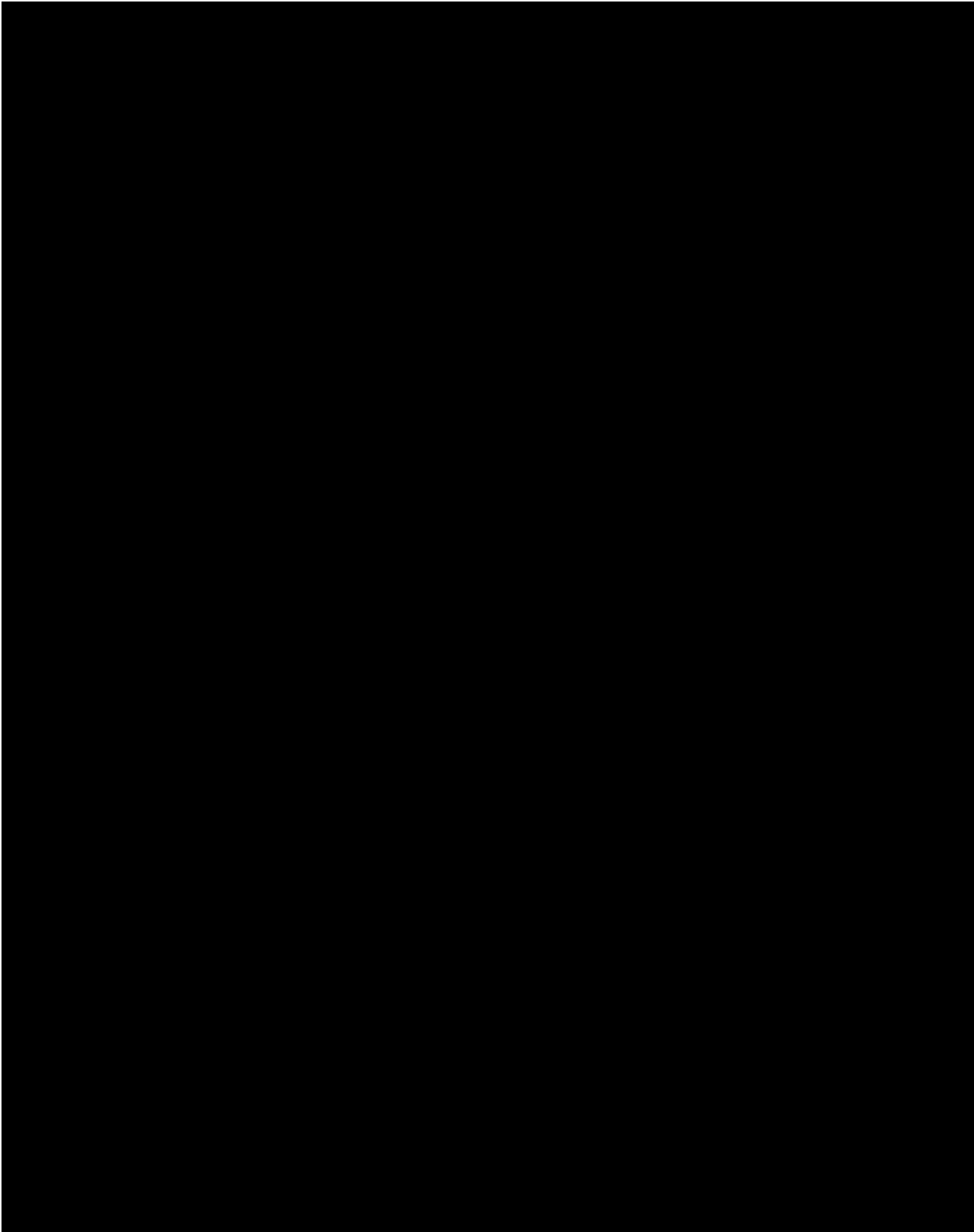


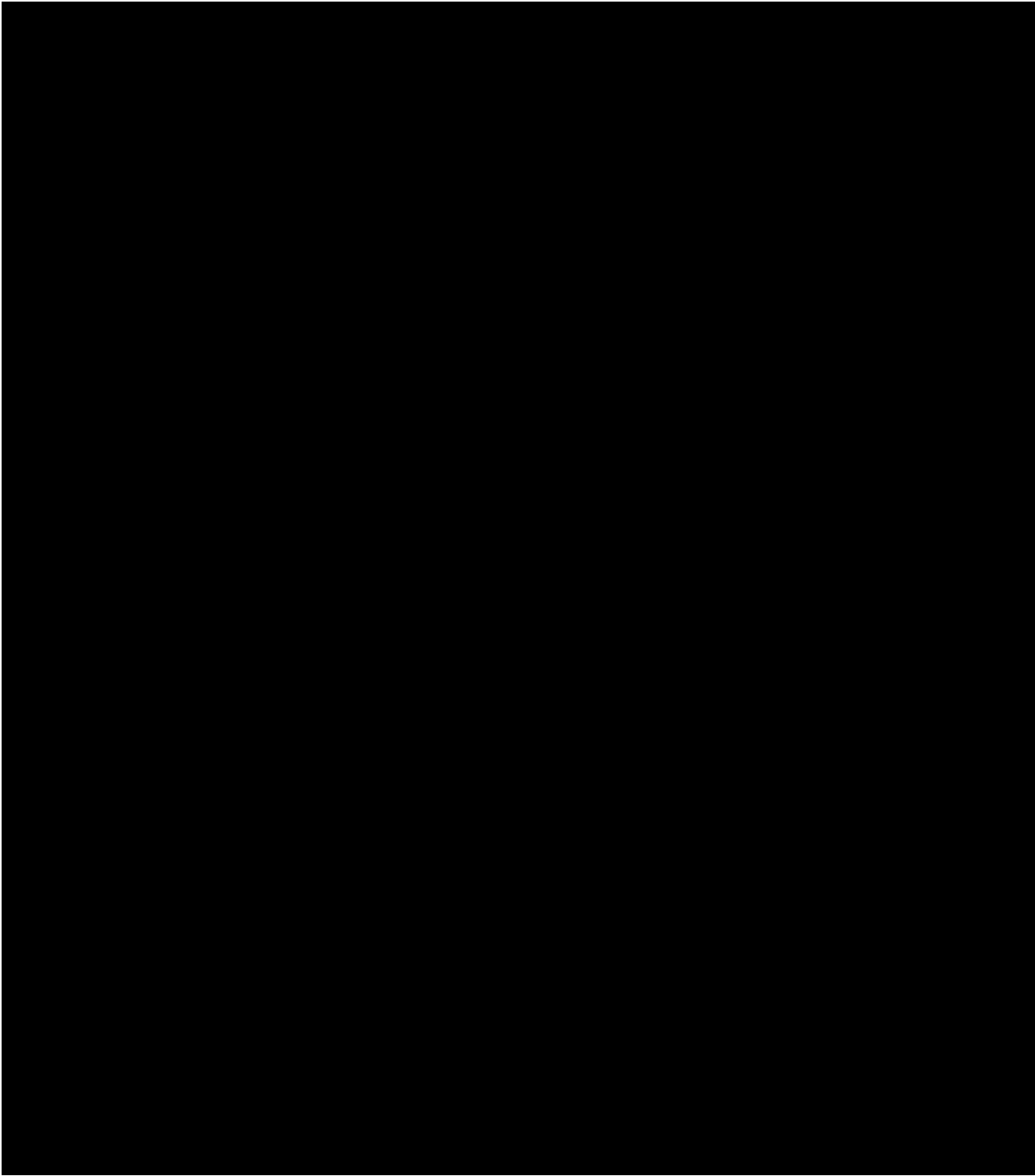


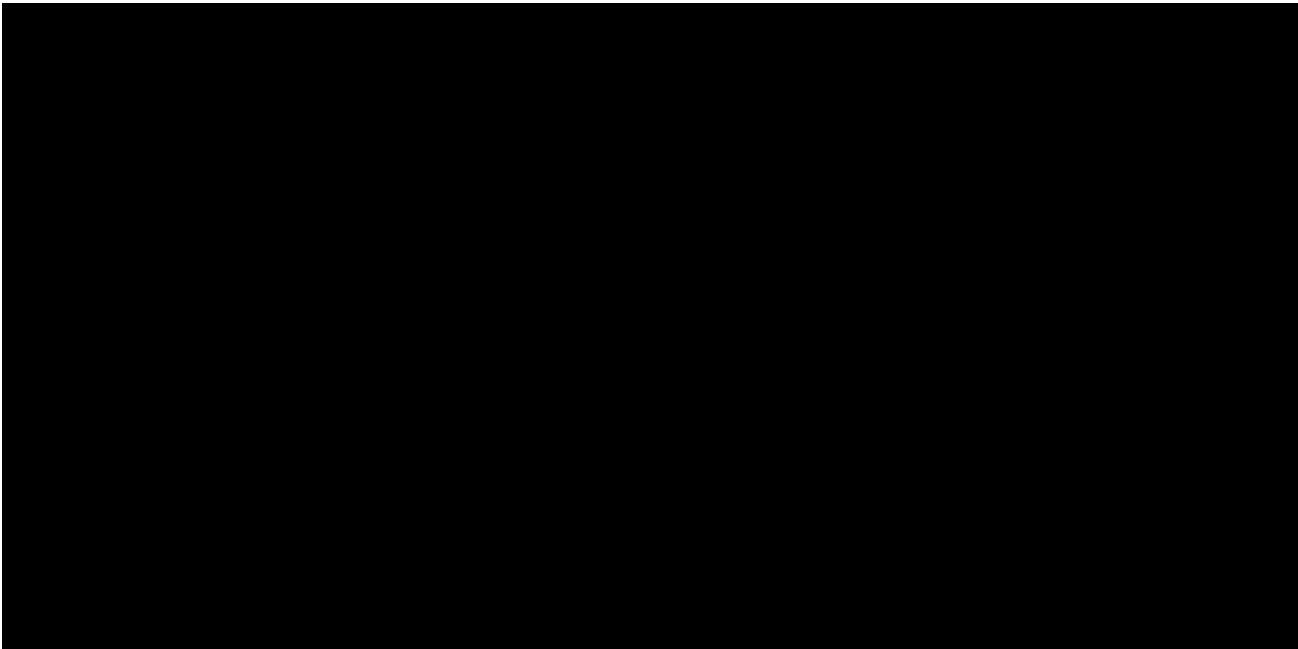


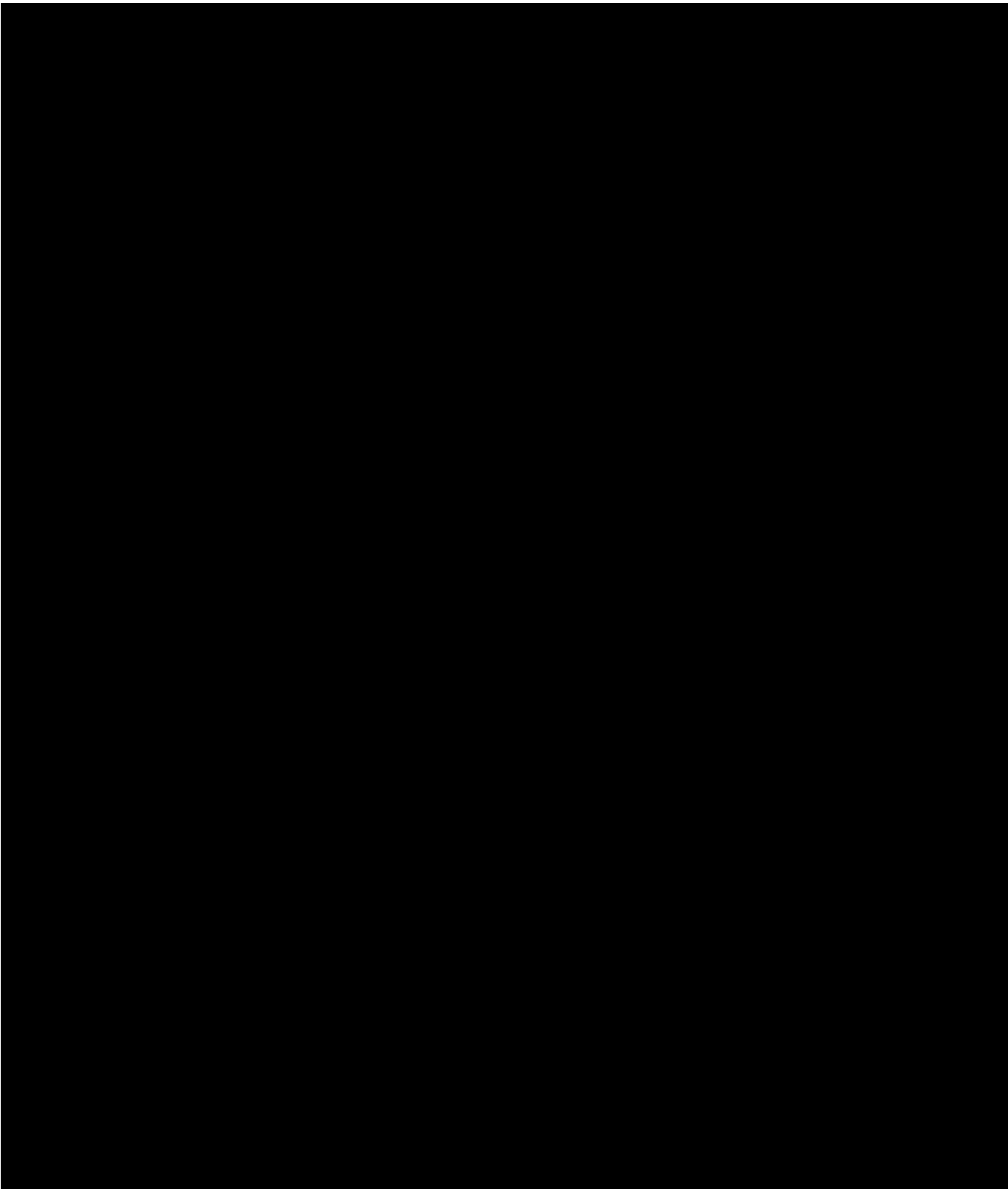


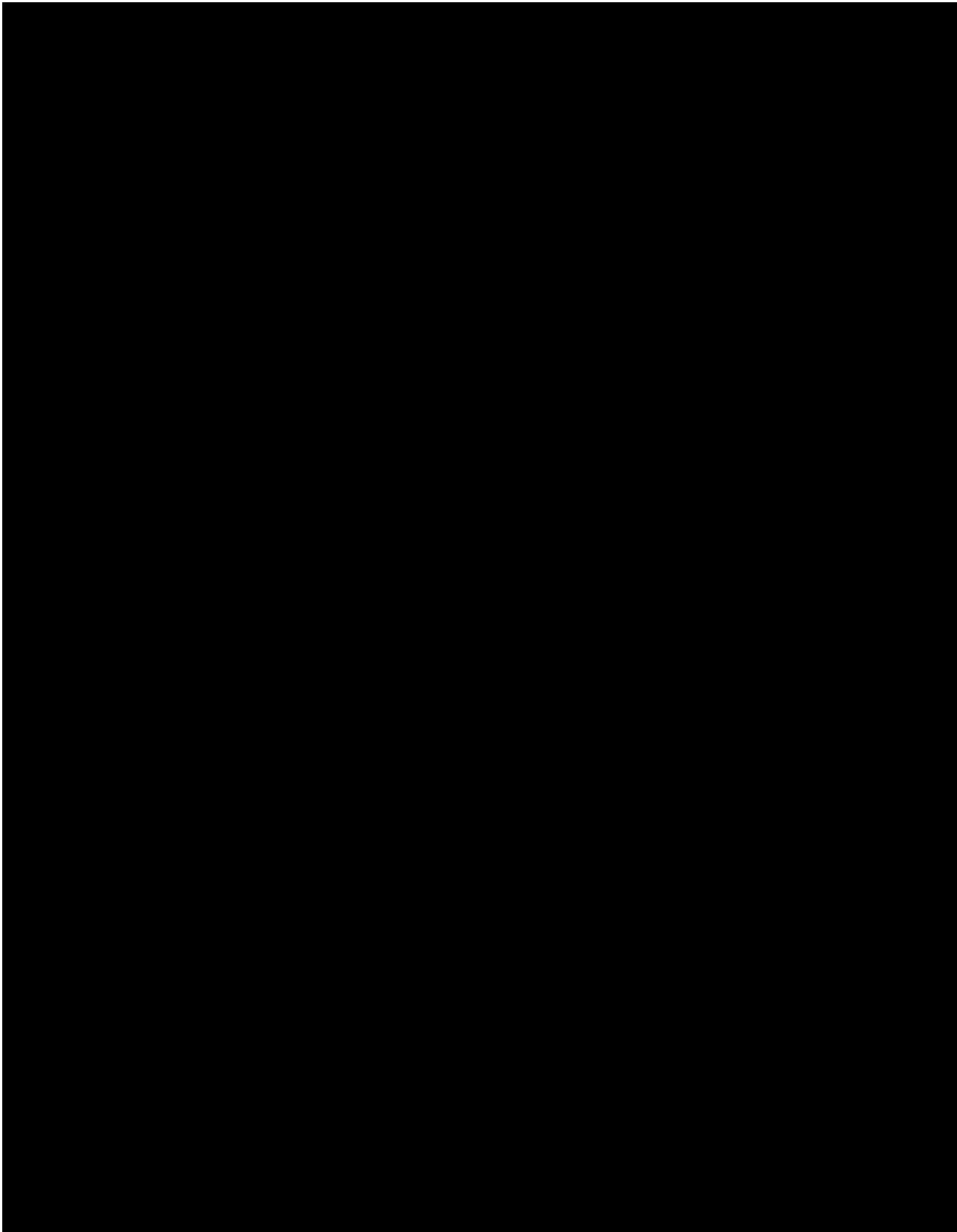


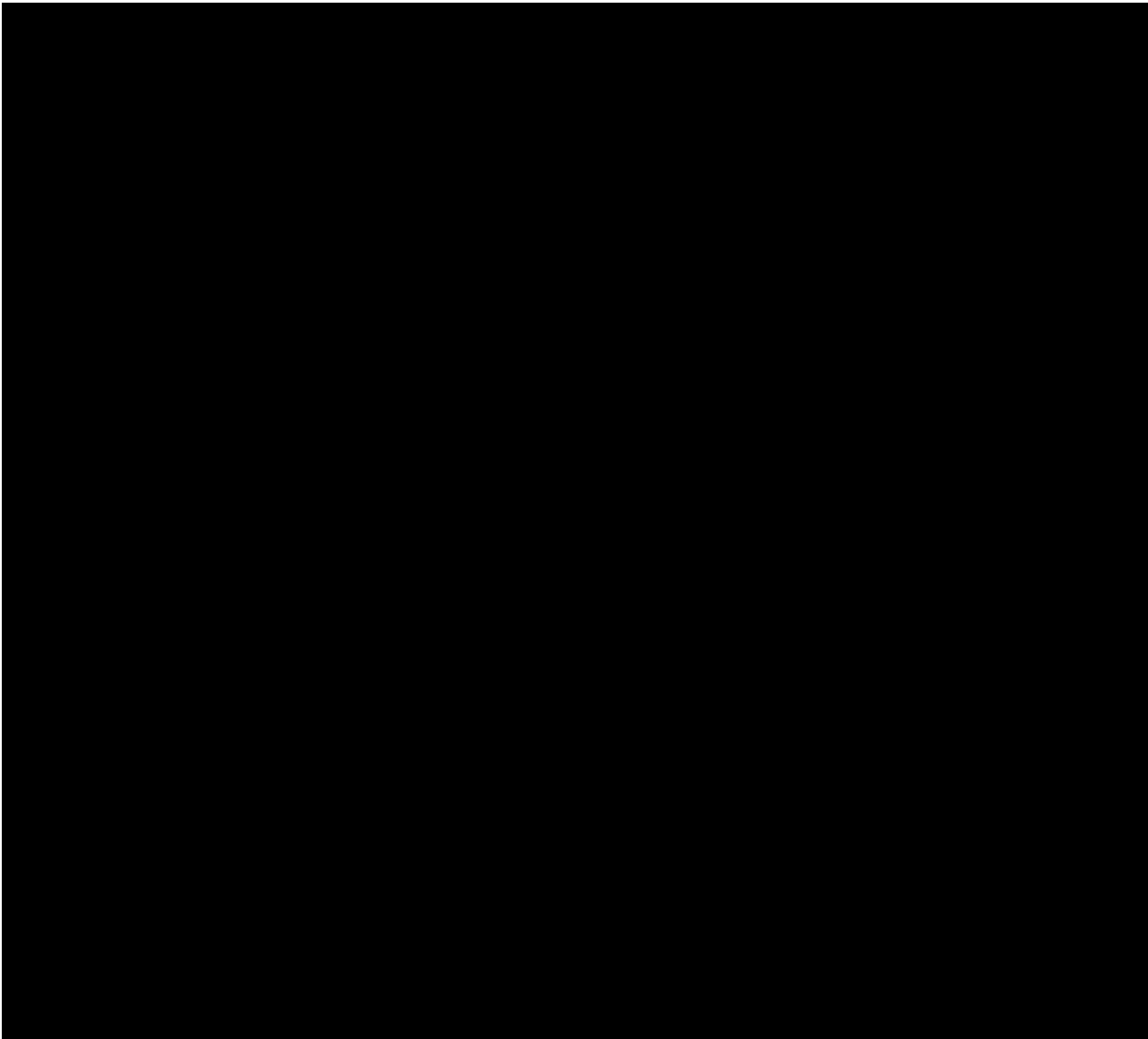


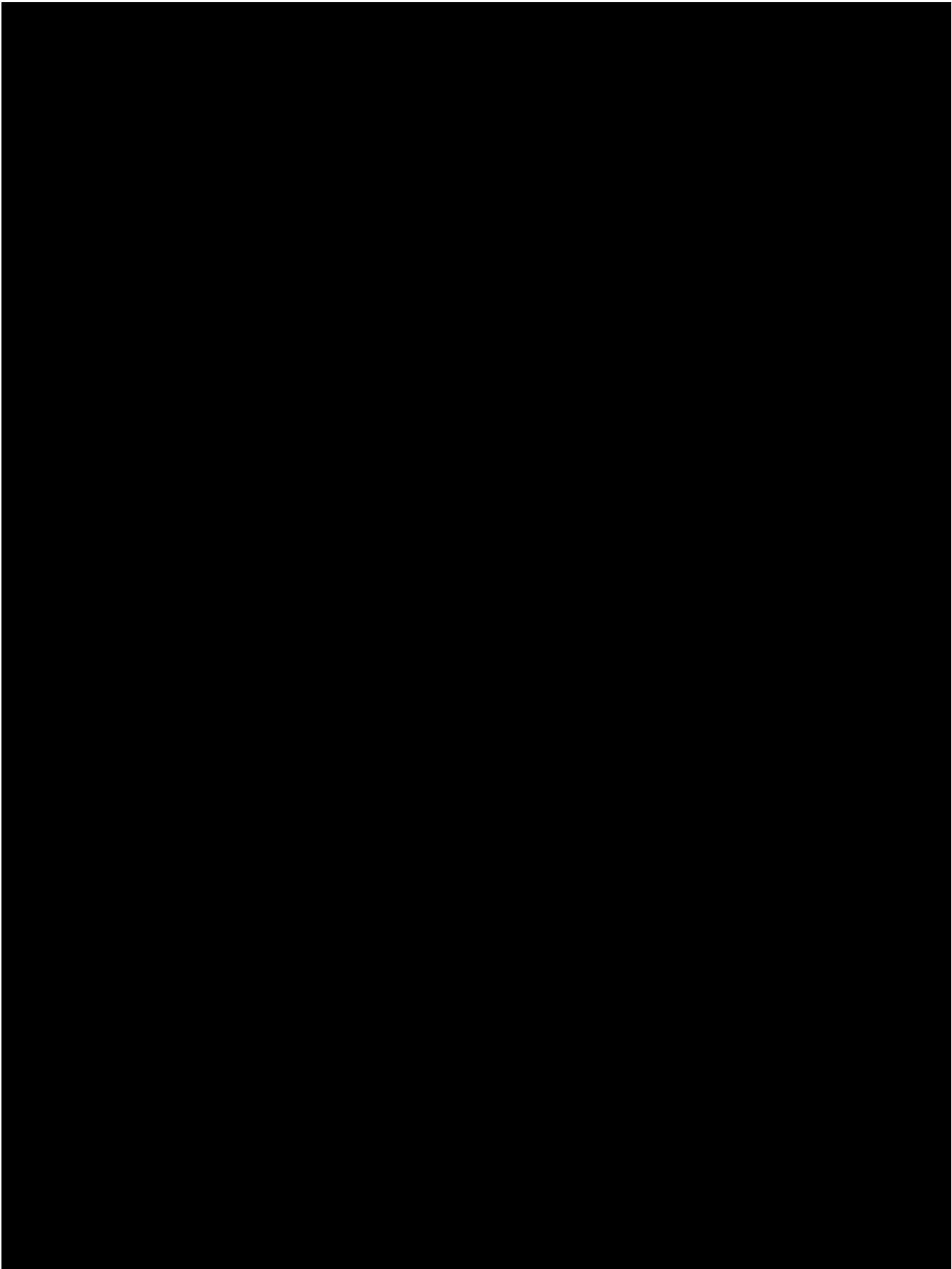


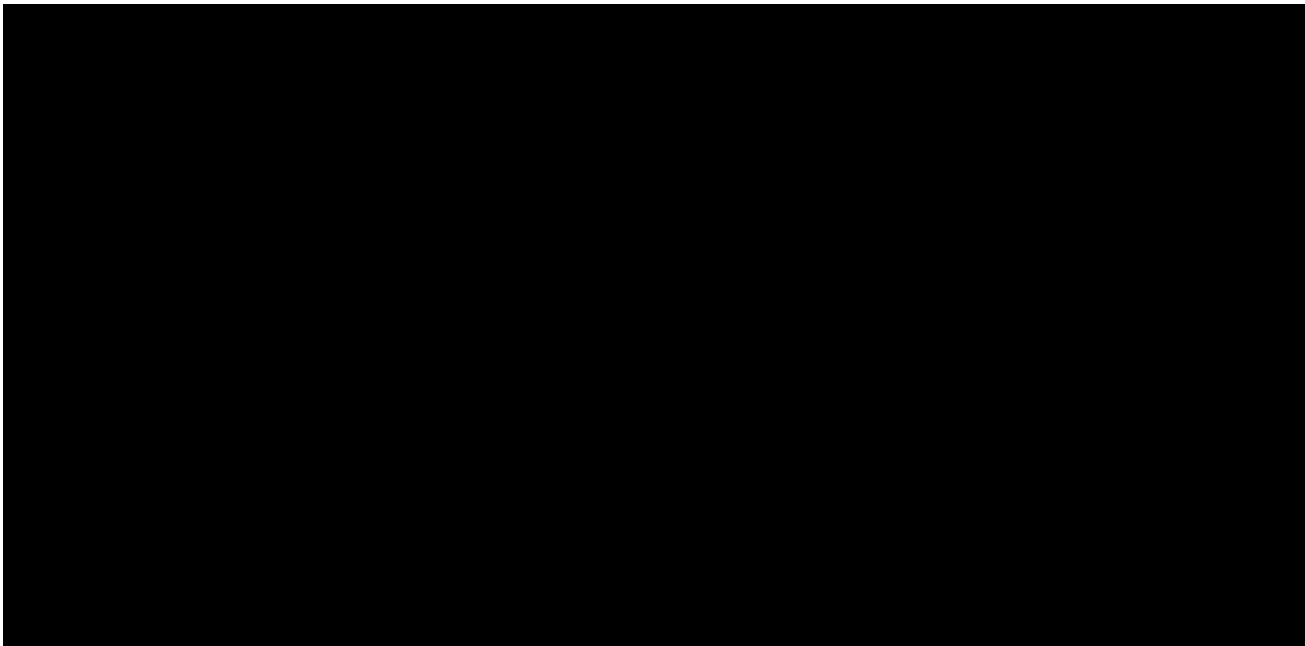


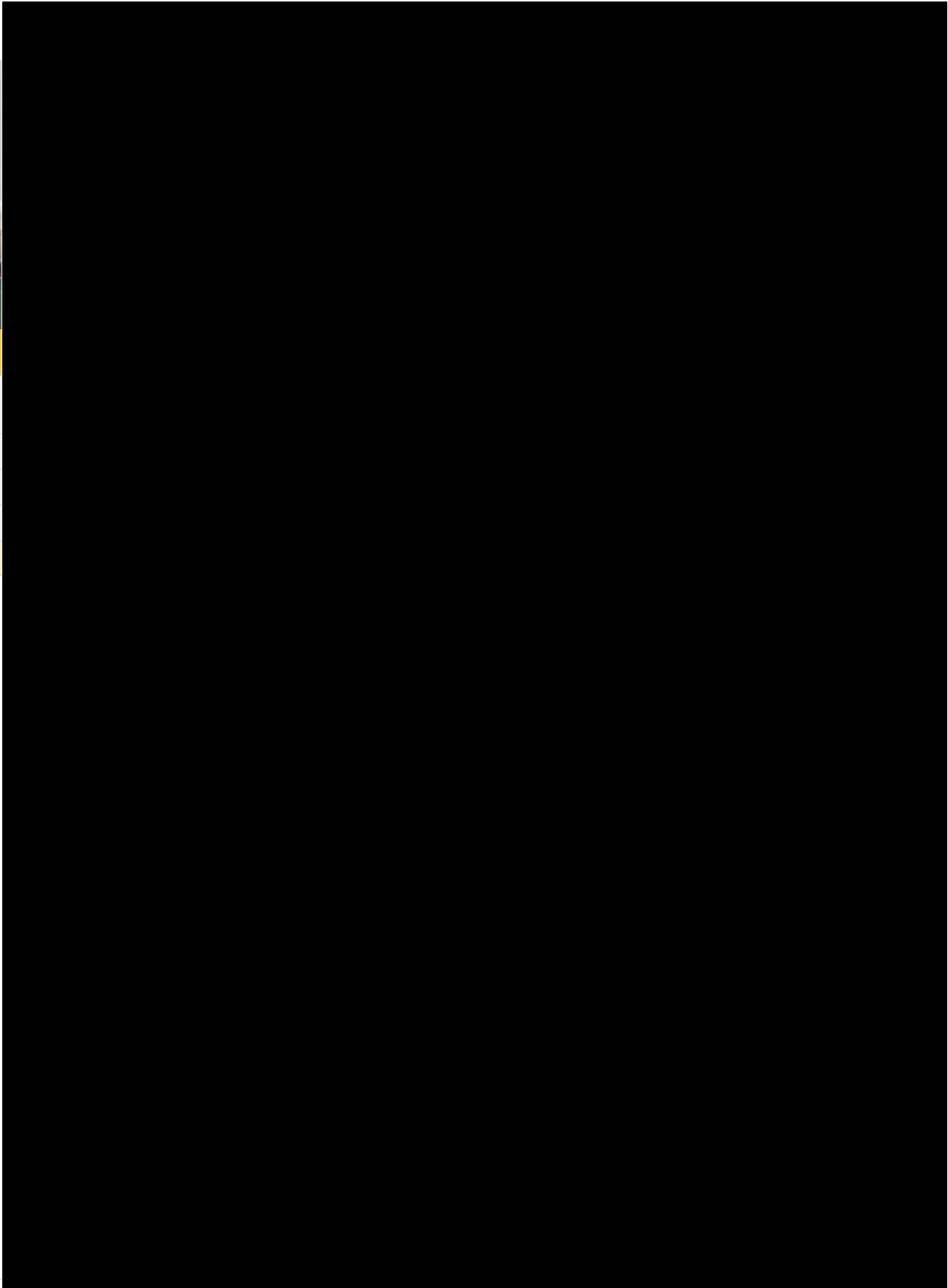


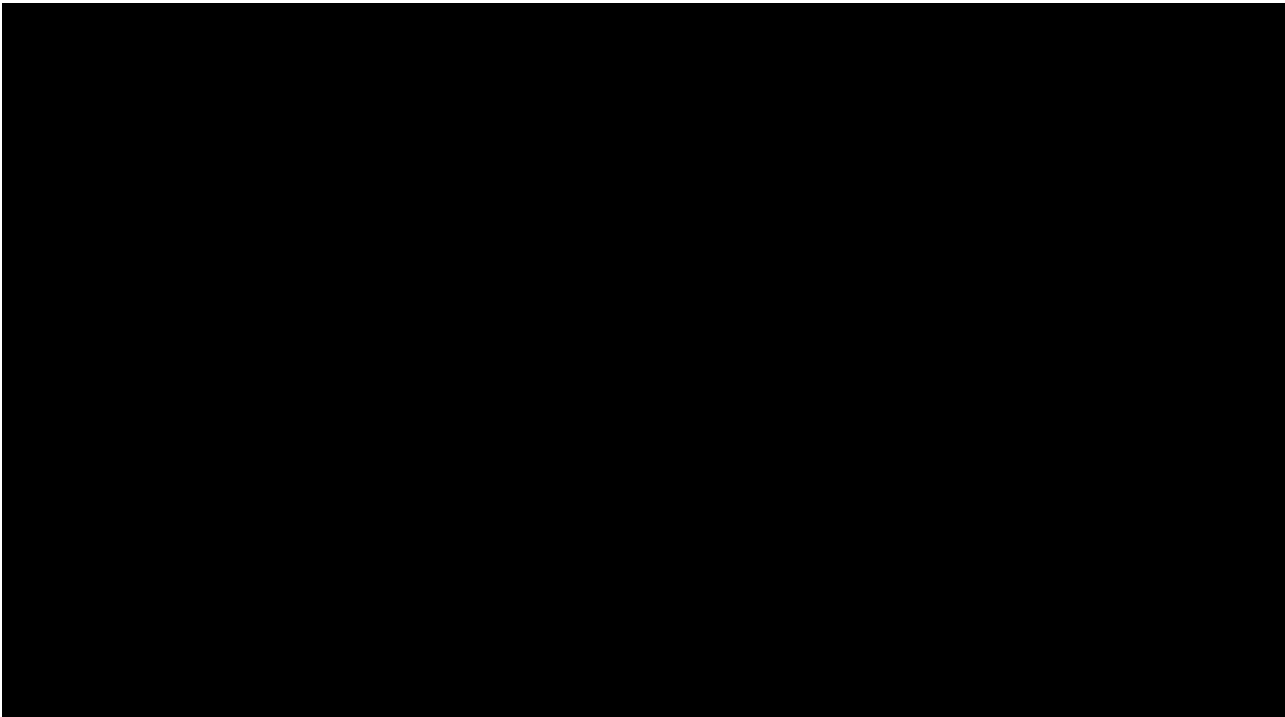














4

Specific Plan (Methodology)



4. Specific Plan (Methodology)

Explain your specific plans for providing the proposed services outlined in the Statement of Needs

George Mason University has been on a journey to improve the student experience over the past 5+ years, including providing access to services 24/7, creating a care network for new students, and revamping the student initiation process. We are excited to partner with mason on their Student Lifecycle Transformation.

Scope

- ✓ Single Lifecycle Org
- ✓ Student Success
- ✓ Mass Communications
- ✓ Recruitment/Admissions
- ✓ Change Management
- ✓ Data / Integration
- ✓ PMO

Delivery

- ✓ Built on Education
- ✓ 24-Months
- ✓ Agile Design and Development
- ✓ Two MVP Deployments
- ✓ Student Success & Mass Comms: Jan 2025
- ✓ Recruitment / Admissions: July 2025

Proven Approach

- ✓ Student Experience Led
- ✓ 20+ years of Salesforce CRM experience
- ✓ Led 2-year CRM program at Rutgers University
- ✓ Robust enterprise / agile delivery experience
- ✓ Industry Cloud Experts

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Our engagement with Rutgers University is similar to Mason's needs and has informed our approach - which centers around successfully connecting five key pillars, as reflected in Figure 15. We will continuously refer to this framework throughout this section as we describe how we will meet Mason's requirements.

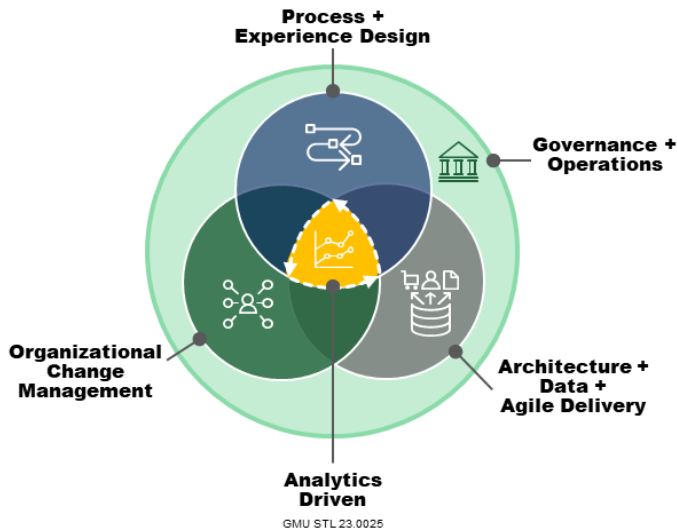


Figure 15. Our proposed process and methodology are highly adaptable to any existing or preferred approach.



**Process +
Experience
Design**

Our solution will be experience-led. Instead of jumping straight to technical designs, we will map out an aspirational student journey in alignment with Mason's future state vision and confirm that all phases of the solution meaningfully enhance the experience.



**Architecture +
Data +
Agile Delivery**

Our functional and technology team will exist as 'two-in-a-box' to minimize communication inefficiencies and enable rapid iterative design and development feedback loops. We want to show you design visualizations and working software as quickly as possible. We work with you rather than doing this project to you.



**Organizational
Change
Management**

Our Change Management team will engage early and often in experience, process, requirements, and design workshops to effectively assess the impact to the entire Mason community and develop a holistic change strategy that spans external marketing, communications, and training.



**Analytics
Driven**

We embed metrics throughout our approach to identify new requirements, drive a precise and intelligent delivery process, and measure user adoption. At any point in time, we will be able to articulate % completion (e.g., % design complete).



**Governance +
Operations**

Our methodology is grounded in strong processes to help create a strong connection across multiple cross-functional stakeholders to mitigate issues/risks. We will be at Mason's side to continue evolving the COE and supporting a Central-Local model.

a. Approach to Services

a. Your approach to providing the services described herein.

In the following sections we describe how we will provide services using the five key activities above as they are aligned to Section 4, High Level Needs and Requirements paragraphs 1-7.

Governance

A Salesforce Center of Excellence acts as a central governing body for the entire organization. It brings together stakeholders from across the organization to create a single, well-defined group that is responsible for making decisions when it comes to Salesforce.



George Mason needs a partner who can support their goal of establishing a Salesforce Center of Excellence (COE) as the central governing body for the entire organization as well as establishing strong governance during program delivery.

Salesforce COE

Figure 16 reflects our future state vision for Mason’s Salesforce COE. Our team will partner with you to meet you where you are at and help you think through the evolution of your operating model as we progress over the course of two years. We believe five components set the foundation for a Salesforce COE.

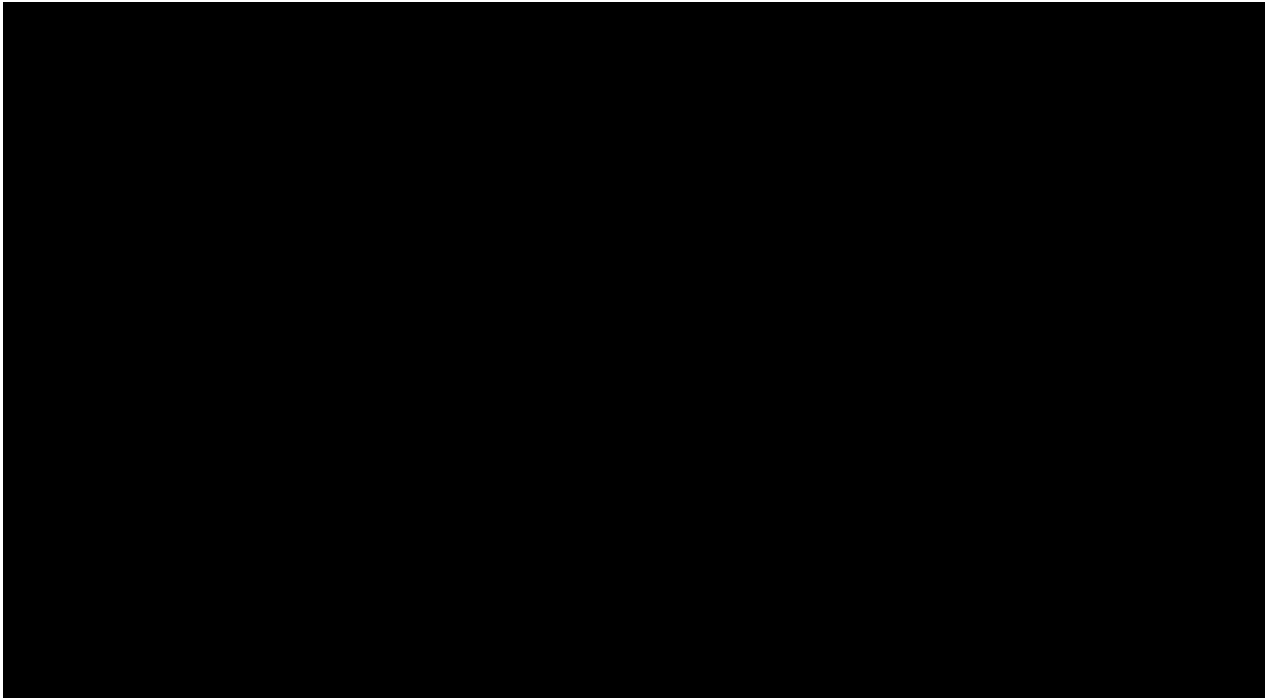


Figure 16. We will partner with Mason along their journey to expand their Salesforce COE capabilities.

- **Strategic Program Office:** Information Technology Services and Functional Unit leadership co-govern the vision, new projects, internal/external communications, and overall portfolio finances/risk.
- **Value Tower:** Power users focus on ensuring students and staff get value across all phases of the solution, incubating innovative ways of leveraging the Salesforce platform to achieve this goal.
- **Project Delivery:** A cross-functional team delivers projects and continuous feature enhancements.

- **Tier 3 Support:** Scalable, low-cost, processes provide on-going support to end-users.
- **Salesforce Platform Architecture and Operations:** Critical processes are required to maintain the health of the platform and increase automation within delivery processes (e.g., automated testing).

Program Governance:

In addition to the COE operating model, we recommend establishing a governance structure that helps manage the delivery of this project. Figure 17 shows our proposed three-tiered governance framework that aligns operational measures and initiatives with the strategic direction. We will work with Mason to mobilize and operationalize this structure, making changes to this structure should you need it to fit into your existing governance protocols. Delivery governance is critical for enabling our teams to collaborate cross-functionally, minimize miscommunication, manage issues/risks, and make decisions quickly.

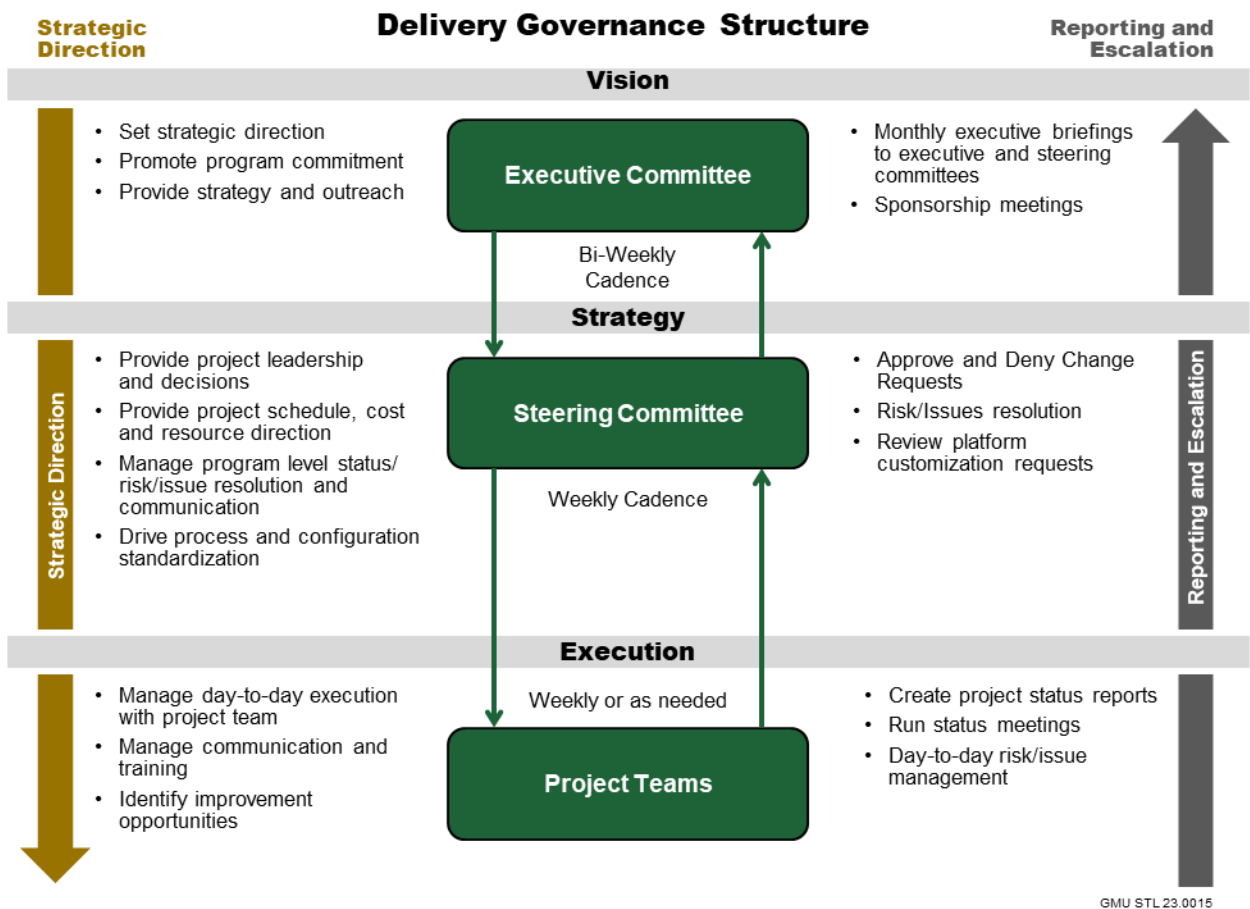


Figure 17. The framework incorporates both a “top-down” approach for strategic planning and a “bottom-up” approach for reporting, information sharing, and issue and risk escalation.

With this methodology, Mason will be grounded in a strong governance process to help navigate between the schools to shepherd their priorities and needs. This methodology also supports communication and collaboration at the strategic, tactical, and operational levels to achieve program goals. Mobilizing this structure early will enable the program team to manage issues/risks and make decisions quickly.

Helping Mason achieve the benefits of a Salesforce COE



For decades we have worked with education institutions across the full spectrum, including nonprofits,

government agencies, regulatory entities, employers and more. We understand that it takes collaboration across stakeholder groups to drive change. Collaboration is particularly important for public institutions, such as George Mason, that seek to impact local, regional, and global communities.

We have established Salesforce Centers of Excellence (COEs) and innovation centers across the globe with specialization in various technologies and industries. Recently, we partnered with a High-Tech firm to build a new 80-person Salesforce.com Center of Excellence, which produced 30% savings in delivery and support costs. This transformation, which spanned over 3 years, achieved multiple successes which are as follows:

- Increased the number of releases per year from 30 to 56
- Reduced the time it took to delivery 'quick' enhancements from 18 days to 24 hours
- Increased the number of enhancement requests vetted from 500 to 720 due to improvements in the business architecture and demand intake processes

Security

The security functions of confidentiality, integrity and availability are largely implemented through the security controls that exist within Salesforce. For Mason, some of the data loaded into Salesforce is protected by the Family Education Rights and Privacy Act (FERPA). In addition, depending on needs there may be other personally identifiable information stored in the solution. Security mechanisms should be implemented so that there is no undue risk to the data.



**Architecture +
Data +
Agile Delivery**

We understand that Mason is focused on ensuring the confidentiality, integrity, and availability and protection of your student's data – and is committed to ensuring alignment to the Family Education Rights and Privacy Act (FERPA) so that there is no undue risk.

We help clients efficiently and effectively defend their digital businesses using business processes, applications, cloud, security, and digital infrastructure capabilities. Accenture will assign a Security Lead to work with Mason's security and functional leads to identify sensitive data for proper classification and traceability. We take a Security by Design approach to Salesforce security – our Security Lead will oversee and confirm security requirements are followed to Mason's specifications.

- **Build security into the CRM System Services foundation**
- **Apply industry standards, such as NIST and ISO**
- **Enhanced domains**
- **All-inclusive security using the Salesforce Platform**

Secure Baseline

At the start of our engagement, we will use our **Accenture's Security Accelerator** to automatically update Salesforce settings to their most secure state. This security hardening tool will provide a secure baseline for Mason and its users.

Identity and Access Management (IAM)

We utilize Salesforce authentication capabilities to integrate with your enterprise identity provider (IdP) to provide **Single Sign-on (SSO)** and identity management along with **Multi-Factor Authentication (MFA)** for secure authentication and authorization. This will verify that all password policies configured in your IdP are enforced and provide additional layers of security to mitigate unauthorized access. As an added layer

of protection, we will implement **IP restrictions**, where possible for users that will always access Salesforce from a Mason network. Users that are allowed to directly login to Salesforce (only for emergency access if IdP is down and non-production environments), will have strict password policies for complexity, shortened timeout periods, expiration and MFA with Salesforce Authenticator to reduce the risk of credentials being compromised.

Data and Application Access

The **principle of least privilege** is followed for users to only have access to application functionality and data needed to perform their task. This will include traceability to manage, monitor and audit user access for **sharing rules, user permissions, role hierarchy, object, and field level security**. Privilege users, such as administrators, will be tracked and kept to a minimum in production environments. For sensitive data, Salesforce data classification will be used to identify fields with sensitive or regulated data such as FERPA, PII and others that are required by Mason's security and compliance guidelines. Once **sensitive data is classified**, **Salesforce Shield** will be configured to **encrypt data at rest**; We will work with the Mason security team on the requirements for key material and key rotation policies. Additionally, we will use **data masking to keep sensitive data secure in non-production environments**.

Development Lifecycle

Secure coding practices will be enforced; code will be scanned using a **static application security testing (SAST)** to identify any code security vulnerabilities and help developers remediate findings before they are allowed into the development pipeline. At each release the team will review **Salesforce Health Check, Optimizer and Release Updates** for potential security vulnerabilities and remediate any findings.

Cyber Posture and Monitoring

A **penetration (PEN) test** will be done at major releases to simulate a cyberattack on experience cloud sites and to validate security controls. During the final release we will perform a **Salesforce Security Risk Assessment (SSRA)** which is a tools-based assessment with Accenture IP to review Org security posture. This assessment will provide detailed output on findings and remediation steps for optimal security and risk mitigation. Salesforce Event Monitoring will be integrated with Mason's Security Information and Event Management (SIEM) tool, Splunk, to provide real-time event monitoring for Mason's security team.

These are all part of **defense in-depth** that will secure your application and data with leading security practices.

Client Data Protection

Accenture's **Client Data Protection (CDP) program** is based on ISO 27001 controls and applies leading security and privacy practices and methodologies, including the HIPAA and HITECH Acts, for managing sensitive client-owned data, Personally Identifiable Information (PII), and Protected Health Information (PHI). The CDP program directly supports security and privacy risk management for our clients.

Decentralized Central Model

The recommended organizational approach is one where ITS controls the Org, but the business units drive innovation. The ITS Salesforce Team includes a Salesforce Architect, Salesforce Developers, Salesforce Administrators, Business Analysts, and a Scrum Master. ITS is responsible for DevOps and runs QA on functionality developed for the business units. Each business unit's staff includes a Product Owner(s), Subject Matter Expert(s) (SME), Power User(s), and, depending on the unit, may also include Salesforce Administrators and Business Analysts to work in tandem with central ITS resources.



We think about Mason's aspirations for a Decentralized Central Model from three angles.

First, we will operationalize a governance model that spans both the functional units and the Information Technology Services team, which we have previously described in the Governance section above.

Second, we will form an integrated team across Mason and Accenture that can work closely together during delivery – to do this project with you, not to you, illustrated in Figure 18.

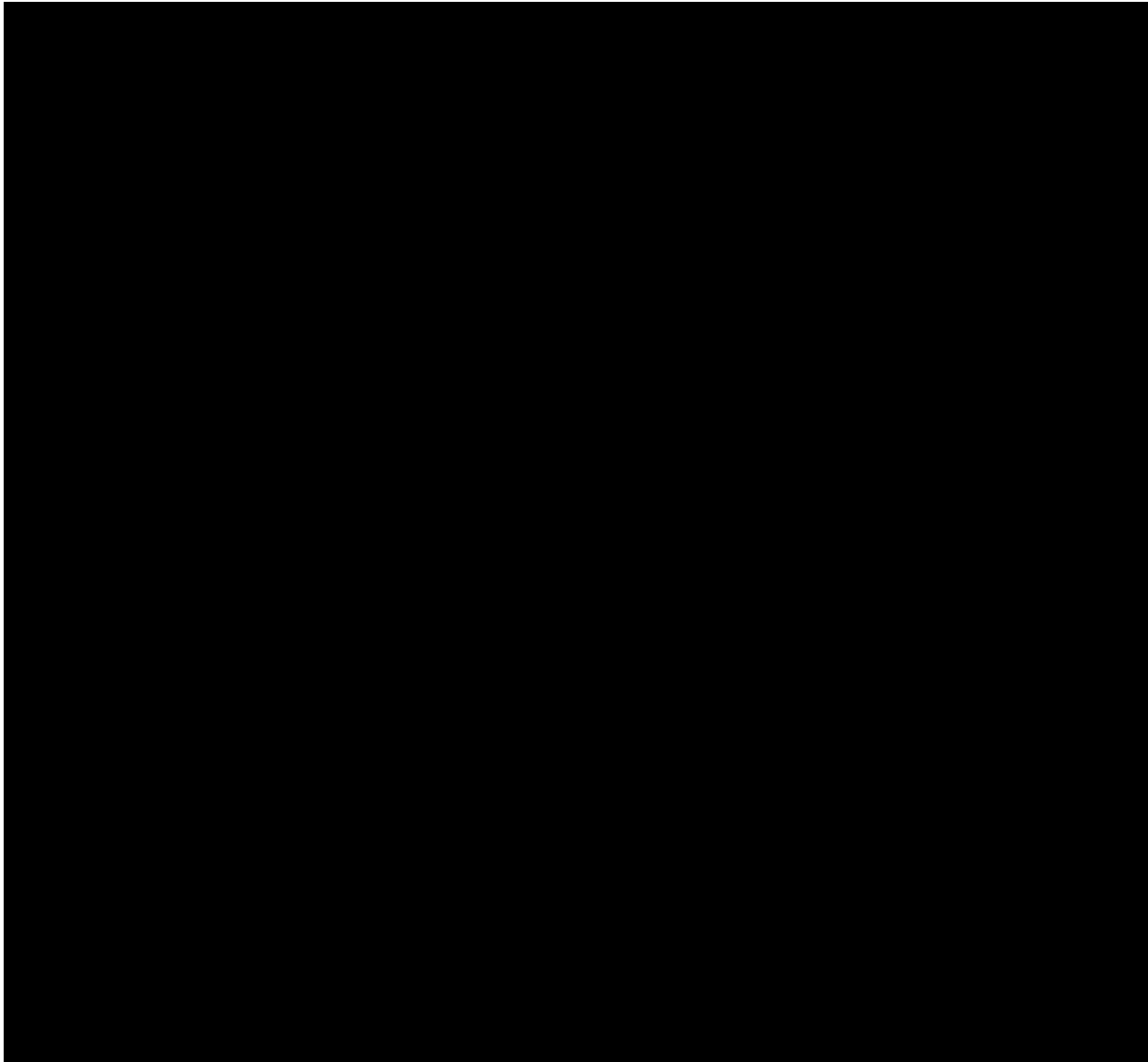


Figure 18. Our proposed team will become one with Mason, partnering side-by-side.

Third is how we organize and execute our workshops to cultivate a tight integration between student experience and technology capabilities. The more siloed our sessions become, the higher the risk that we create a solution that is misaligned with stakeholder expectations. Our goal is to avoid this common cause of project dissatisfaction, as shown in the Figure 19.

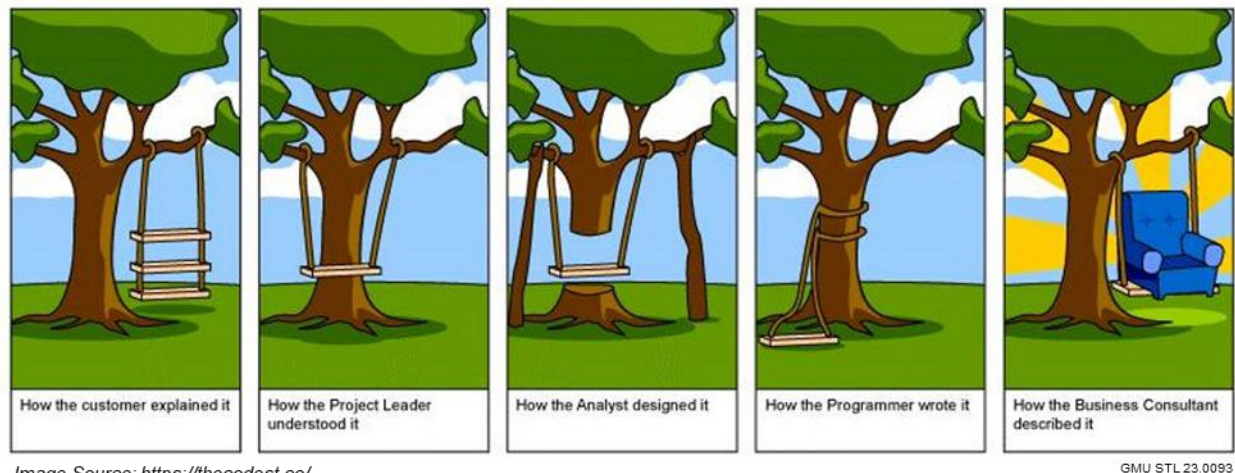


Figure 19. Avoid silos to reduce the expectation gap.

We avoid expectation gaps by conducting cross-functional Conference Room Pilots (CRP), as shown in Figure 20 , throughout discovery, design, build, and test phases to eliminate miscommunication and clearly align on critical student experience and solutioning requirements and design.

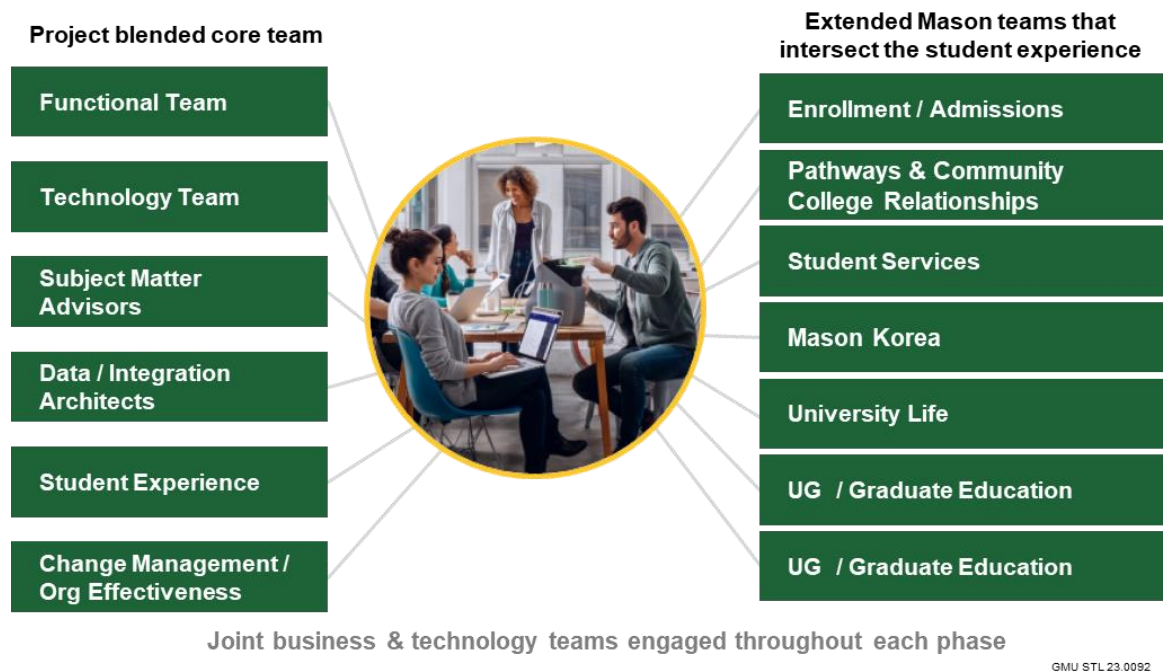


Figure 20. Conference Room Pilots (CRP) are designed to foster communication and collaboration by helping the stakeholders to align on processes, experiences, and solutions.

The CRP approach anchors on the concept of constantly showing the interconnection of student experience and process, value drivers (e.g., student retention), and application functionality side-by-side so that we

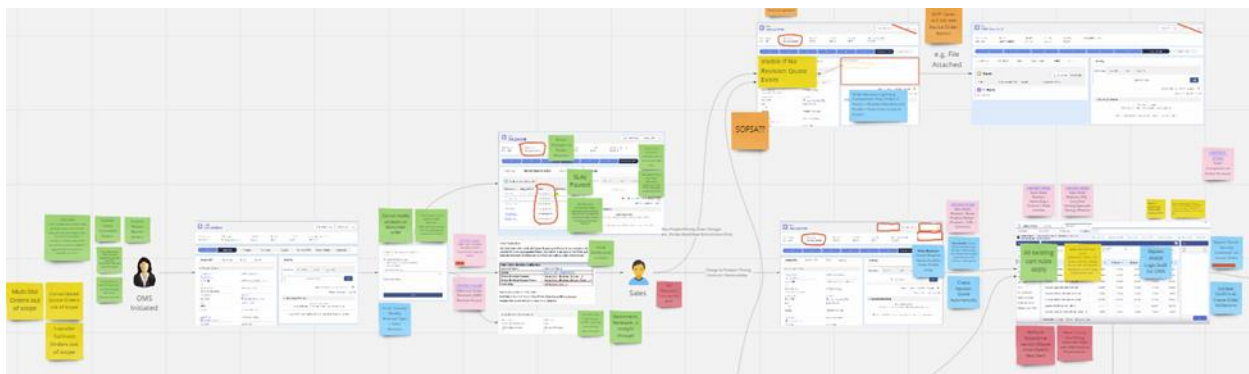
never lose sight of what institutional outcomes the technology platform is helping deliver. From an application perspective, we always start with ‘out-of-the-box’ Salesforce capabilities to drive standardization and simplification early and often. Additionally, this approach helps foster rapid decision making, prototyping, and feedback loops, which will lead to higher quality solutions and faster delivery.

Figure 21 and Figure 22 showcase how we bring our methods to life both in-person and virtually.



GMU STL 23.0095 A

Figure 21. An example of a cross-functional student experience workshop



GMU STL 23.0095 B

Figure 22. Our discovery and design process is meant to be very visual and iterative in nature. We will cycle through multiple experience and process flows to illustrate system capabilities and refine our solution.

Agile Development Methodology with Work Intake and Prioritization

Agile is an approach to product delivery that helps teams mitigate unpredictability through incremental, iterative work cadences. At the core is Scrum, a project management framework that promotes short cycles, iteration, learning, and team improvement, as well as getting and measuring feedback to ship the next increment of a product. suggests that Mason start with a Kanban framework, where work items are represented visually on a Kanban board so team members can see the status of all work items and each team member is only working on a single item at a time.



**Architecture +
Data +
Agile Delivery**

Per the High-Level Needs and Requirements of the RFP, we understand Mason prefers a software development approach that utilizes Agile methodologies and principles – our approach for Mason meets your expectations. As a firm, we deploy Agile delivery methods across client engagements as an approach – and, just as importantly, as a mindset. We follow Agile principles like flexibility, adaptability to changes, prioritization, frequent iteration, and collaboration.

We have experience in implementing software using various implementation methodologies and have learned over time what methodologies work well for what situations. As a result, we like to think of 'Agile' as a spectrum.

Given Mason's scope and priorities, we recommend starting with an Agile delivery approach that allows us to simultaneously establish a strong design foundation while still being iterative throughout design, build, and test (see the center of Figure 23 below). Instead of starting out with very short design, build, and test cycles, we recommend having a longer design period to develop a stronger understanding of the architectural, data, and integration interdependencies between the user stories in scope. This timeline will allow us to develop a strong foundation and reduce the risk of having to redesign the solution down the road.

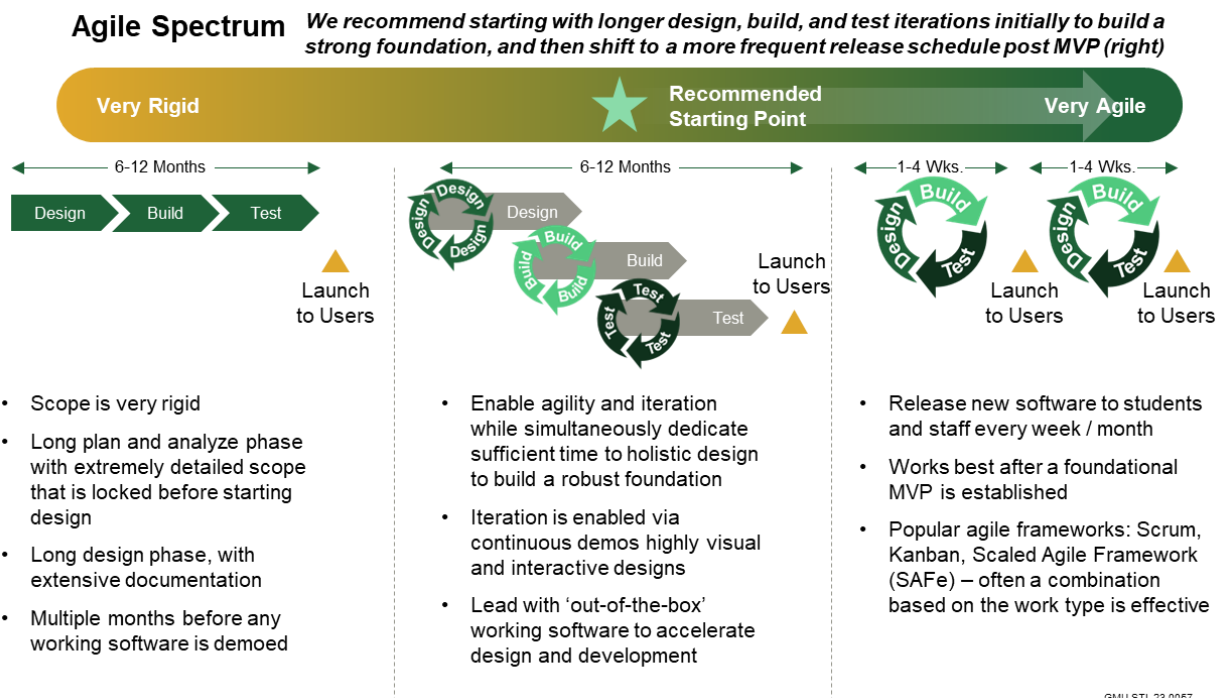


Figure 23. Our proposed Agile delivery approach is customized to Mason's scope and priorities.

Once we establish a base foundation, we will shift to shorter design, build, and test cycles using either Kanban, Scrum, or SAFe Agile delivery frameworks. We have found that Scrum or SAFe works better for initiatives that have more rigid timelines and scope clarity. Kanban on the other hand works much better when the timing of incoming requirements is less predictable. We will partner with you to ensure the best methodology is applied at the best time. Regardless of the specific Agile approach taken, we will confirm we follow a couple core principles, described further in Figure 24.

- Our goal is to show the functional units how a requirement translates into a design or solution as quickly as possible so we can iterate toward a solution that is fully aligned with the needs of students, staff, and faculty.
- We establish strong transparency of requirements and solution designs across all stakeholders so that at any moment in time everyone is aware of the priorities and capabilities being developed (e.g., Kanban Board Visualizations).

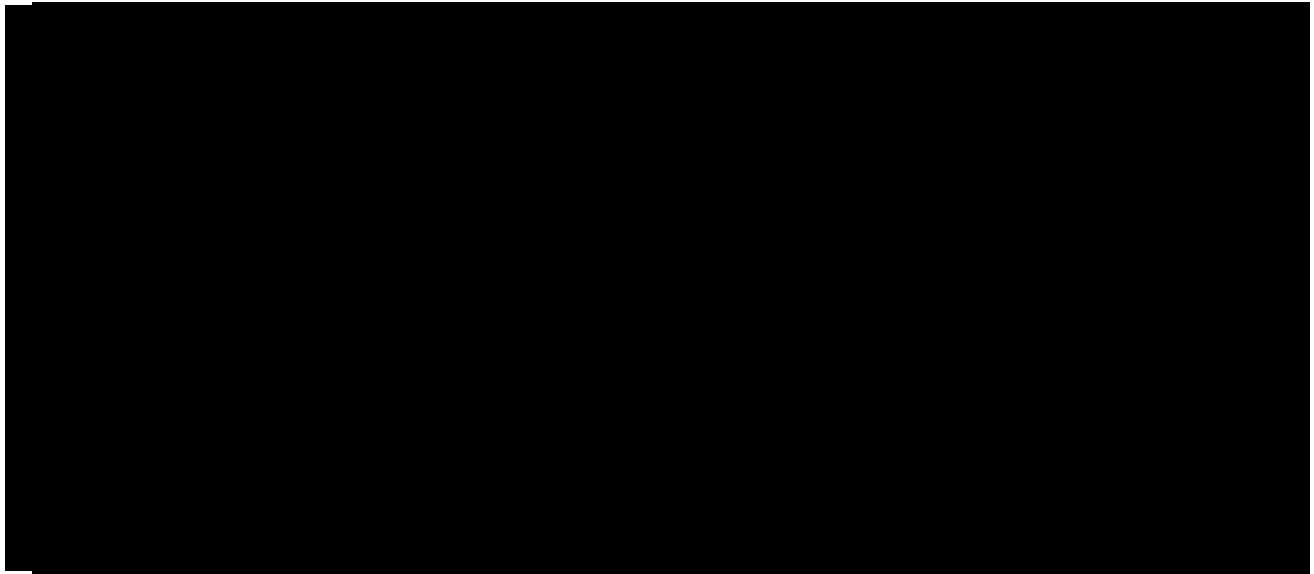


Figure 24. The Hybrid Agile methodology provides a collaborative delivery model.

We describe the graphic above to help illustrate what it will feel like to go through delivery with us:

- **Student Experience:** We will develop an aspirational end-to-end student journey to guide the program toward the highest priority solution requirements throughout the Student Lifecycle transformation. Figure 25 below provides an example of a student journey map like what we will develop for Mason.
- **Process:** Our team will review the current state/desired process in the context of 'Out-of-the-Box' Salesforce. By using 'Out-of-the-Box' Education Cloud capabilities as an anchor we can structure our conversations across our stakeholders and aim to minimize solution customization and standardization across the institution.
- **UI/UX:** We will work to understand current state UI/UX pain points and future state aspirations.
- **User Centric Design:** Our team will convert the desired process/UI/UX/moments of truth aspirations into mock-ups of how the future experience will come to life to confirm we are delivering on the aspirational student journey. Figure 25 below illustrates how we will facilitate these experiences in Miro/Mural. Beyond Miro/Mural, we will demo functionality directly out of Salesforce to help facilitate requirements collection and design.
- **Iterate:** We will iterate through steps 1 through 3 until we confirm the scope/high level design. We will then use that information to develop detailed functional and technical design documentation.
- **Build:** Our team will develop working software.
- **Test:** We will perform system tests based on test scripts prepared by referencing functional and technical design documentation.
- **User Centric Design:** Our team will demo back to the cross-functional team to verify alignment with original designs.
- **E2E Test:** We will perform E2E systems integration tests based on test scripts prepared by referencing functional and technical design documentation.
- **Deploy:** Our team will launch functionality in production to end users.
- **Hypercare:** We will support users during and after go-live.
- **Adoption Measurement:** Our team will collaborate with the cross-functional team to measure user adoption and funnel enhancement requests back to the beginning of the requirements intake process.

- **Project Management:** We will use the power of Agile Accelerator to manage the end-to-end delivery process, reflected in Figure 25.

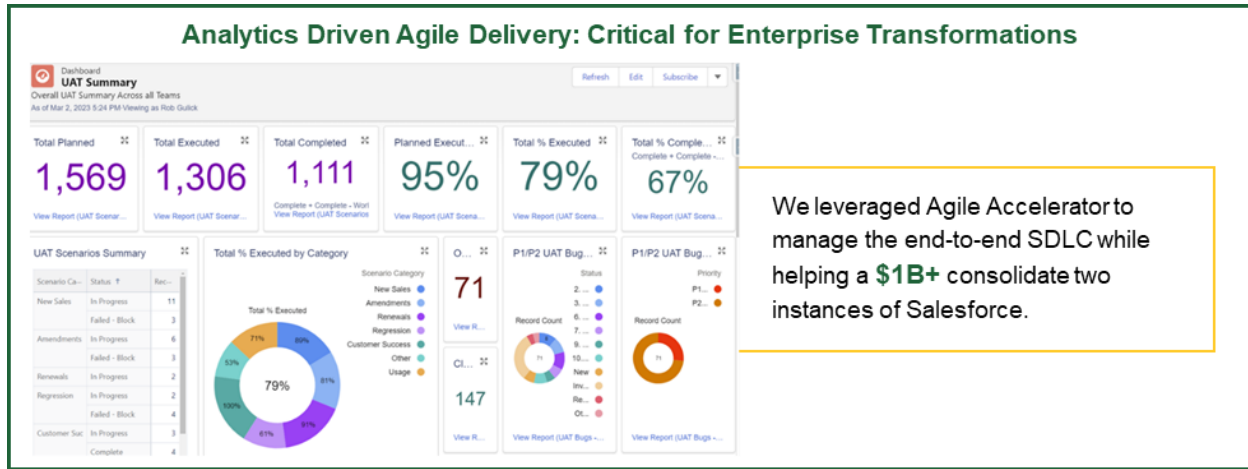


Figure 25. Using analytics we have managed User Acceptance Testing in Agile Accelerator in a previous engagement.

DevOps

DevOps practices like version control, automated deployments, and modular architecture help teams to coordinate and maintain high performance as they grow. To scale effectively, the practices of DevOps are essential.



We understand ITS is responsible for DevOps and will run quality assurance for functionality developed for the business units. As application development has changed, we have created and evolved an application development discipline that focuses on the integration of development, testing, and operations into a rapidly repeatable whole. We recommend an environment strategy that includes the use of:

- **Developer Sandbox:** Used by developers to develop new code and configurations.
- **Developer Pro Sandbox:** Used by developers and testers for quality assurance tasks and to test integrations, as well as for training users.
- **Partial Copy Sandbox:** Used for user acceptance testing and/or end-to-end systems integration testing.
- **Full Copy Sandbox - Production Copy:** Full data sandbox used to support end-to-end testing, as well as performance testing, load testing, mock data conversion, and regression testing.
- **Production:** Used by constituents and end users.

We recommend using a modern DevOps tool (e.g., *DevOps Center, Copado, Gearset, etc.*) to support system deployment as well as a code hosting platform (e.g., GitHub, GitLab, etc.) that will support version control, collaboration and approval processes, and continuous integration. We have skilled release management engineers experienced in the most common tools. We can help inform Mason about available commercial options or we can align to any existing DevOps tools that Mason prefers. We will work with Mason to identify an environment and deployment strategy that will work best for ITS. While we can manage these processes and support knowledge transfer near the end of the project, we have found it is best to form a release team of Accenture and university employees who will be supporting the system in the future to manage releases throughout the project.

Our innovations in testing automation, cross-team collaboration, and continuous integration lay a solid foundation to implement industry-leading DevOps techniques, and our Accenture DevOps community—including 15,000 experienced DevOps resources—has many more tools and techniques to accelerate results. We stand ready to work with Mason to provide our expertise in scaling the DevOps essentials.

Master Data Management and Data Warehousing

Clean constituent data should be curated so Mason can implement a Master Data Management (MDM) strategy to ensure its record repository can be leveraged effectively by the Salesforce and other integrated systems.



Architecture + Data + Agile Delivery

Accenture understands the importance of clean data for Master Data Management (MDM). This area is the heart of a good data management project. The focus here is on aligning business processes and data design to achieve a consistent, trusted data set with prescribed processes and standards for future maintenance. We helped hundreds of clients on their digital transformation journeys assess and define data strategies anchored in business use cases leveraging value frameworks, maturity benchmarks, and design thinking approaches to co-create the possible. As part of this program, we will use quality rules in migrating ETLs to cleanse Names, Addresses, Phone Numbers, Emails, and a few other fields to validate that what goes into the new org in Salesforce is cleansed and ready for MDM. We will work with existing Data Quality rules and augment where we can find a big win and improve the quality accordingly. This process will prepare the data for a key component in an MDM program. Although not included in our solution, it is highly recommended to review during the Discovery phase how to include matching and quality rules into the everyday function of the Salesforce platform. Without this key component, data will start to go stale or lose integrity shortly after go-live.

With over 2000+ Certified Data Architects, and renowned Data and AI thought leadership, we have deep experience assessing and defining data architecture across on- and off-premises platforms. This experience includes data modeling, patterns for traditional Data warehouses, and big data solutions with unstructured or high velocity data. Accenture has vast experience across Higher Education and both the private and public sector. We have created business-value-driven implementation plans that account for leadership reporting requirements (high value use cases), strategic goals, and data readiness. We focus on delivering business value in each sprint as the foundation is built out. We also gather data product-by-product. These Data products will be prioritized/sequenced in the Implementation Roadmap deliverable.



As we continue through the program, cleansing and updating the Student/Faculty/Person record in Salesforce, we will look for avenues to utilize Accenture specialized teams dedicated to data modeling, data integration, and master data. This process could include everything from functional and technical reviews to leveraging an Accenture asset which is a unified data model accelerator that is a comprehensive, world-class enterprise data model that spans multiple corporate functions and can be integrated into a multitude of use cases.

The models are managed and maintained by a highly experienced data modeling teams that is one of the best-skilled in the world. The Accenture Unified Data Model (AUDM) provides an industry-based accelerator linked with business-oriented use cases to provide a best-practice-based acceleration in data model creation that will provide exceptional quality and efficiency for the data modelling process.

Disaster Recovery and Continuity of Operations (COOP)

A formal disaster recovery and business continuity plan should be developed to allow Mason to operate and remain as resilient as possible in times of uncertainty. This business continuity planning involves pro-actively defining the process Mason would undertake to deal with possible threats that may affect Mason’s means to operate the Salesforce Org effectively.



Per Question 67 in the Q&A amendment, Mason indicated that DR & COOP is in place and that the consultant will not be asked to include these services in scope. Accenture has experience helping clients develop both Disaster Recovery and Business Continuity plans and can support Mason if required.



b. Services Implementation

b. What, when and how services will be performed.

Enabling Education Cloud for Mason: We understand Mason’s goal is to combine its two exiting Salesforce orgs currently using TargetX, the Student Lifecycle org (undergraduate) and the Graduate Salesforce org, into a single environment to align with Salesforce and higher education industry best practices. This transformation will create a more consistent applicant and student experience, improve collaboration across the university, and confirm Mason is able to make use of Salesforce’s new Education Cloud solutions. The scope of our services will result in a transformative experience that encompasses the ecosystem in Figure 26.

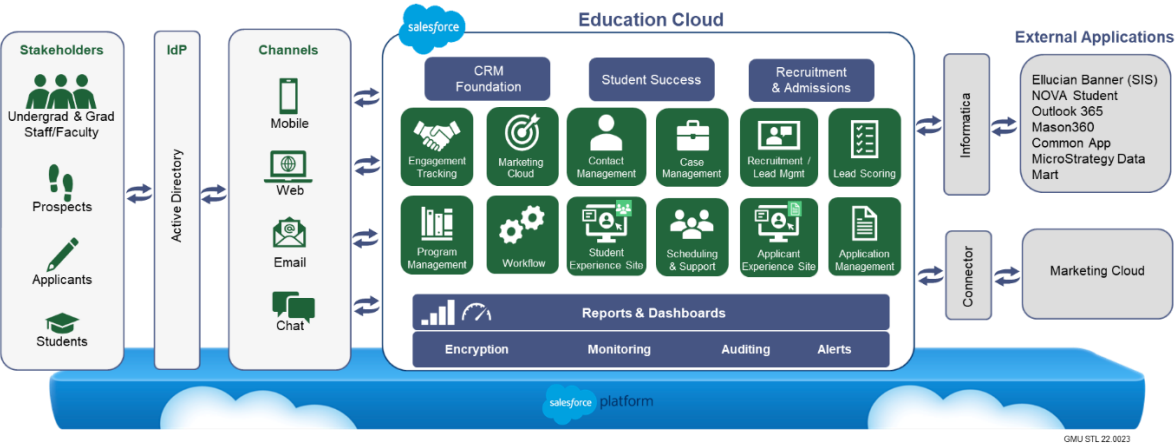


Figure 26. Accenture brings in a transformative experience for Mason which results in improved Student Lifecycle Experience.

Our plan starts with a two-month vision and student experience phase, a 17-month Student Success and Mass communications platform deployment and a 12-month Recruitment & Admissions deployment timescale as shown in Figure 27.

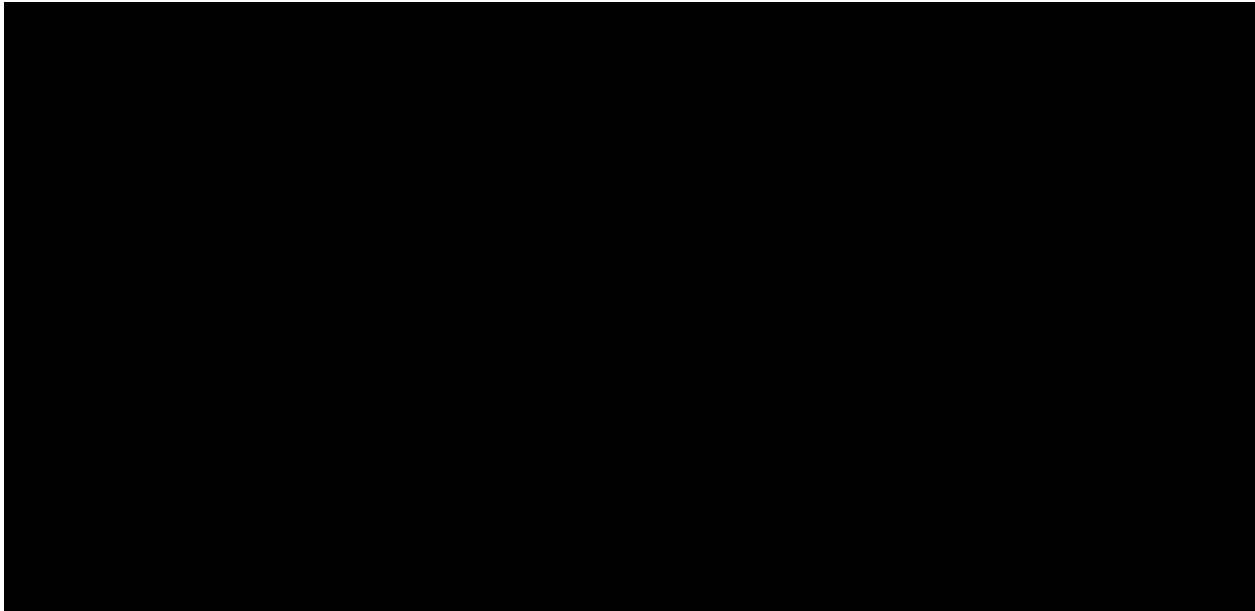


Figure 27. Our proposed Timeline is designed to meet your planned implementation dates & academic schedule.

What and When services will be delivered

We understand the complexity of combining multiple orgs into one, especially when it involves many different types of students, constituents, and business processes. We also appreciate the need to create as painless a transition as possible for applicants, students, and staff who will be navigating these changes, while enhancing their individual experiences. Therefore, we are recommending a phased approach starting with setting the vision and student experience. Next, in the first release, we will focus on creating a strong foundation for student data and implementing student success processes along with the mass communications platform and related mass communications for students.

Then, in a subsequent release, we will implement recruitment and admissions processes. Organizational change management activities will be held throughout each phase of the project along with establishing and supporting the university’s program governance efforts. Our recommend approach consists of multiple phases, as shown in Figure 28.

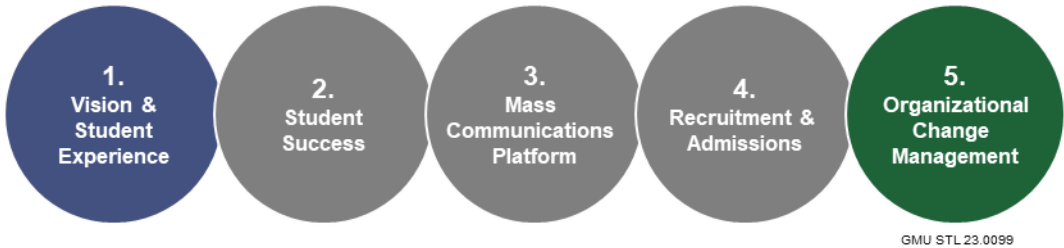


Figure 28. Our multi-phase approach will help Mason though a seamless transition.

Vision and Student Experience



The most brilliant product will go unused if people do not see the **purpose** in using it. Defining the *why* behind the Student Lifecycle Transformation confirms that the *what* and the *how* of the solution are purpose-driven and value-oriented, ultimately guiding George Mason to build a solution that meaningfully addresses the needs of its students. Figure 29 is an example of the design documentation we will create in the workshops.

Successfully executing a digital solution that catalyzes transformative change requires a clear vision to guide the long-term journey - from solution design to change management to technology implementation.

Getting there will require a new way of thinking and operating, propelled by visionary leadership and organizational alignment.

Sample student experience design principles

To create world class experiences that make human moments precious, the student journey must...

1. Prioritize Success
Help students reach their academic goals by building experiences that prioritizes program completion as the most important measure of success.

2. Support the Whole Student
Put students at the center by providing a safe, inclusive and personalized environment that extends beyond academics.

3. Ensure Quality*
Offer experiences that meet students' liquid expectations and deliver value while enabling meaningful learning as set forth in the university's mission.

4. Continually Evolve
Leverage data and machine-learning to regularly improve university systems and processes to meet evolving student needs and continually offer best-in-class experiences.

5. Offer Right Place, Right Time Support*
Increase discoverability of available resources and maximize overall serviceability through predictive communications and information in the right channels.

6. Optimize the Human Touch*
Compliment self-service tools with strategic human interventions that elevate the student experience and empower faculty and staff to meaningfully engage students.

GMU STL 23.0091

Figure 29. The design thinking workshop will align on project objectives and help set experience-led solution guiding principles for both design and delivery.

The vision set forth in this initial two-month vision and student experience phase. Discovery period will continue to serve as a guiding beacon for the solution's evolving design over the years of its implementation; it will always ground the transformation back to its core purpose even through the inevitable shifts of student demands, institutional priorities, and market forces.

Our proposed End-to-End Discovery & Student Experience approach focuses on framing an informed vision that outlines the elevated experience George Mason wishes to create through this transformation. This vision will guide *what* the university will do in the student lifecycle transformation and *how* we will bring it to life by first aligning on *why* we are doing it.

Visioning Workshop: A 1-2 full-day design thinking workshop with the project Steering Committee and identified stakeholders to define and align on the vision and objectives for this project, define the guiding student experience design principles (see example in Figure 30, and identify key opportunities areas the solution needs to address. Inputs from this workshop will be used to build the student journey map.

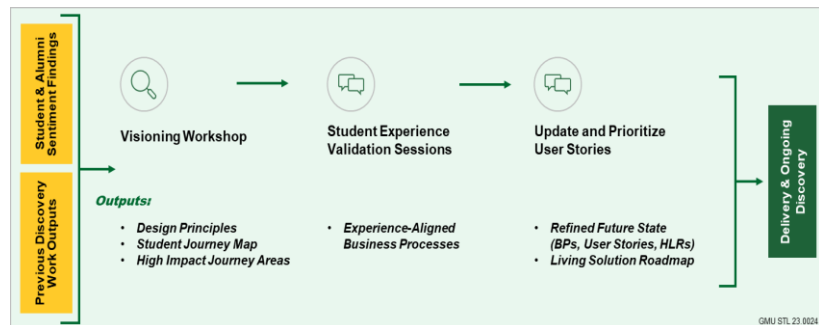


Figure 30. By outlining a clear and informed transformative vision at the start, we can rest assured that the end product is one that you and—most importantly—your staff and students love.

Student Experience Validation Sessions: Across 3-4 targeted sessions, we will apply our new guiding principles to review, validate, and align high-priority business processes. These processes include those identified as high complexity, with significant gaps, and/or critical focus areas in the student journey. We will merge the perspectives of functional, technical, and strategic stakeholder groups to co-create a transformative vision.

Student Success

Architecture + Data + Agile Delivery

After the vision and student experience has been defined, the Student Success phase will begin. It includes establishing the foundational **data** structure using personal accounts for contact management along with related objects for storing program and course enrollments.

These structures will be configured to enable integrations with Ellucian Banner, the student information system. 'Out-of-the-box' duplicate management will be configured to minimize duplicate records. Basic data from Ellucian Banner such as courses, course offerings, and the program stack will be modeled in Salesforce to support **program management** activities and the student data model. **Contact management** capabilities such as updating biographical and demographical information, and activity tracking will be part of the Student Success Release 1.

Core **case management** capabilities with Omnichannel routing will support student success activities and establish a case management foundation, including one-stop shop check-in kiosk and queuing. Salesforce Scheduler will be implemented to support **appointment scheduling** between students and student success staff. **Live chat** will be configured to allow students to start chat conversations with student success users through the student experience site and/or university web pages. The **student experience site** will provide self-service support for students and appointment scheduling between staff and students, reflected in Figure 31.

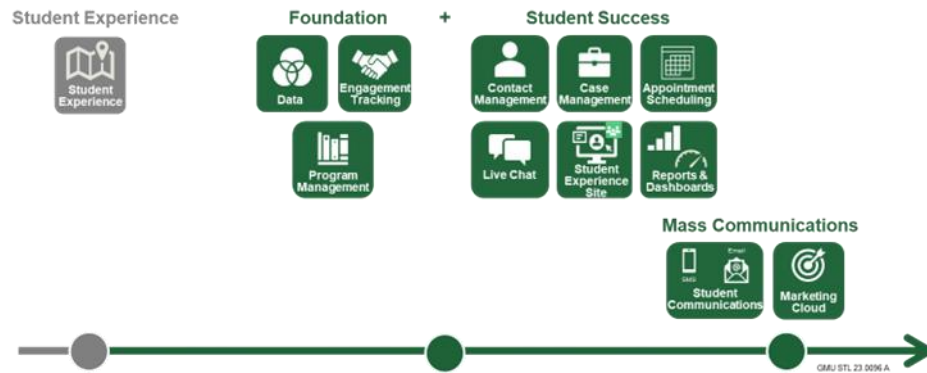
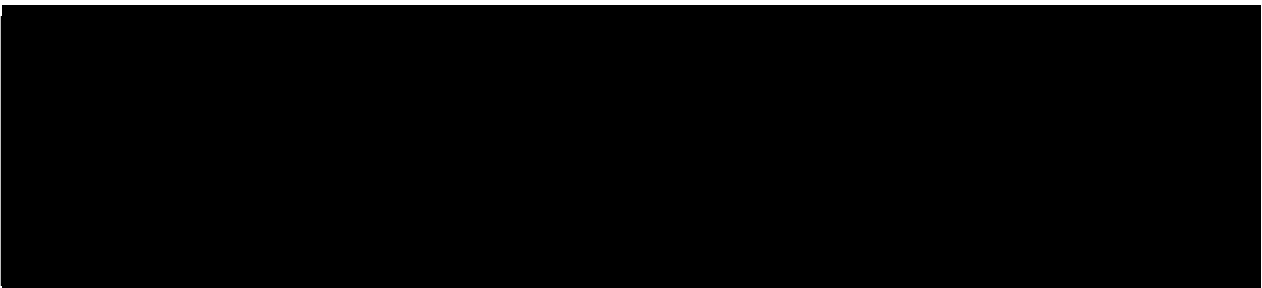


Figure 31. Student Success Scope & Salesforce components

This phase will include the creation of **Reports & Dashboards** related to student success and other processes.

The initial **Marketing Cloud** setup will be completed including creating business units, setting up user roles and other security settings, and implementing the Marketing Cloud Salesforce Connector to sync data. A simple subscription and preference center will be created for marketing communications like event invites and program newsletters. **Student communications** will be delivered through Marketing Cloud using data extensions to store student data and journeys to support transactional communications such as reminders to register.

The Student Success phase includes additional Discovery focusing on the features needed to support Mason's migration off of EAB Navigate leading into the first hybrid-agile Design, Build & Test iterations. We will include **Scope & Requirement Checkpoints** at the end of the Discovery effort to align on Mason's functional and technical capabilities that will encompass the scope for the release. Data migration and integration development and testing activities to support multiple inbound and outbound data transfers with internal, external, or third-party systems will be completed including collaborative data mapping exercises, extraction, conversion activities and load testing. End to end technical validation of each integration will be conducted to validate end points and confirm that related data is successful in reaching the target system. Training activities including planning and content development will occur during the system testing effort in preparation for train-the-trainer sessions for UAT.



User Acceptance Testing (UAT) will provide Mason end users with the opportunity to walk through the solution and confirm their future business processes in preparation for a successful transition. We will collaborate to conduct a change impact assessment and work with the Mason team to prepare the Communication Plan for end users and affected business units. Upon completion of user acceptance testing and user training sessions, a small group of users will participate in a **non-production Pilot** for each release to validate the system usability and verify it can support business processes. A short **Hypercare period** will be provided to support go-live activities.

Advantages of Starting with Student Success

- Keeps student success at the forefront of Mason's strategy.
- Establishes a strong foundation for student data.
- Reduces technical debt and minimizes users working in multiple Salesforce environments.

Keeps student success at the forefront of Mason's strategy.

Mason has a legacy of empowering students to achieve their goals. Focusing on the student experience is a natural starting point when it comes to advancing this effort. Much of the functionality delivered to students during this phase, such as appointment scheduling, case management, and marketing journeys, will be applicable to prospects and applicants. Thus, the foundation created during the student success phase will allow the recruitment and admissions functionality to be implemented more quickly and efficiently.

Establishes a strong foundation for student data.

Many decisions to be made regarding the general setup of the new Salesforce environment will depend on student data, such as how program and course enrollments should be captured and how to manage constituent personas. The student information system (Ellucian Banner in this case) plays a vital role in creating a functional and flexible student engagement system. Therefore, we recommend pairing the creation of the CRM foundation with student success, which is highly dependent on the same data.

Reduces technical debt and minimizes users working in multiple Salesforce environments.

Our plan is to take advantage of the current transition point between recruitment and admissions in the TargetX Salesforce orgs and advising activities in EAB Navigate to improve the existing student experience without creating extensive rework or technical debt. Our team will focus on creating integrations between Ellucian Banner and the new Salesforce environment and moving advising processes from EAB Navigate to the new environment as part of phase 1. This transition will allow recruitment and admissions activities to continue in the TargetX orgs until that functionality can be fully implemented in the new Salesforce environment, reflected in Figure 32. Student success activities will occur in the new environment without requiring integrations with the existing TargetX orgs or to work in multiple Salesforce environments during the implementations.

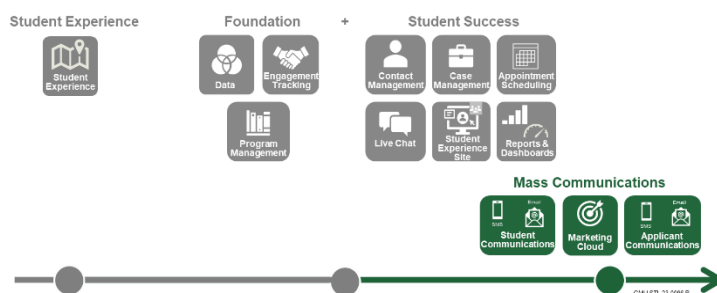


Figure 32. Combining mass communication delivery with the Student Success and Recruitment and Admission phases will keep teams in sync and support a unified mass communication strategy.



Mass Communications Platform



**Architecture +
Data +
Agile Delivery**

Much of the mass communications functionality will be delivered through Marketing Cloud. The initial **Marketing Cloud** setup will be completed including creating business units, setting up user roles and other security settings, and implementing the Marketing Cloud Salesforce Connector to sync data. A simple subscription and preference center will be created for marketing communications like event invites and program newsletters.

Student communications will be delivered through Marketing Cloud using data extensions to store student data and journeys or drip campaigns to support transactional communications such as reminders to register. Additional support will be provided for bulk **applicant communications** related to prospect marketing, program interests, and applications.

Most requirements for mass communications for Student Success and Recruitment and Admissions are delivered through Marketing Cloud, so we recommend including the initial Marketing Cloud solution with Student Success features in Release 1. We will work with the team to deliver additional Marketing Cloud functionality for more business units, data extensions, and journeys needed for Recruitment and Admissions. Our delivery plan includes a recommendation for the Marketing Cloud team to work closely with Mason's communications and marketing teams focused on Student Success and Recruitment and Admissions during each phase to understand the procedures for developing and creating campaigns related to Mason's marketing strategy.

Advantages of Overlapping Mass Communications with Other Phases

- Provide the necessary lead time to implement texting and email marketing.
- Confirm the foundational data structure will support mass communication requirements.
- Support closer collaboration between marketing and other units.

Provides the necessary lead time to implement texting and email marketing.

If new short codes must be acquired for SMS texting, the process must begin early to allow for short code acquisition, approval, and carrier testing. IP address warming may be required to support mass communications and build a strong reputation for your IP address as a part of the Marketing Cloud implementation process, which can also take time.

Confirms the foundational data structure will support mass communication requirements.

Mass communications are essential to both the Student Success and Recruitment and Admissions functional areas. The data structure developed for the foundation of the CRM solution which will happen during the first iterative build phase for Student Success should incorporate Marketing Cloud data

requirements. Similarly, the additional requirements that will be defined, designed, and built during the Recruitment and Admissions phase must incorporate mass communication needs.

Supports closer collaboration between marketing and other units.

Whether a university has a centralized, decentralized, or hybrid marketing strategy, it is important to foster good collaboration between teams involved in transactional and commercial communications with constituents. An advisor sending a transactional bulk message containing orientation details for new freshman may want to know another team is planning to send invites to an optional student meet-and-greet for a particular program that is happening that same weekend.

Recruitment & Admissions



Education Cloud's core capabilities will be used to create and collect RFI forms, with Omnichannel routing to assign leads for follow-up to support Recruitment/Lead Management, reflected in Figure 33. A custom process with custom lead fields will be created to support lead scoring.

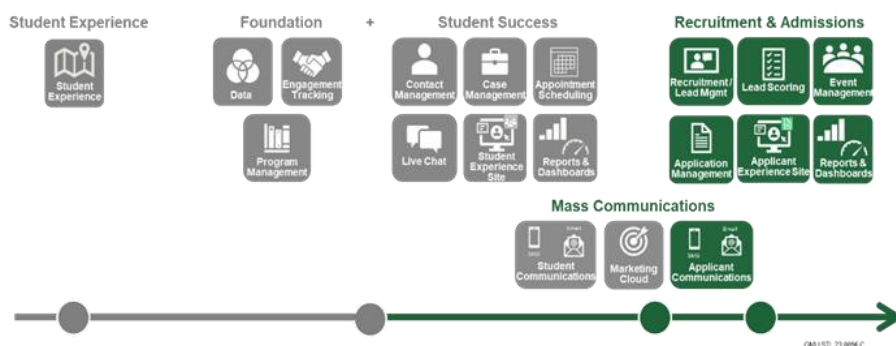


Figure 33. Recruitment & Admissions Scope & Salesforce components.

Application management capabilities including storing and routing application data and managing application review processes, depending on program and academic level, will be implemented using core Education Cloud capabilities. The creation of the **applicant experience site** will provide a place to submit new applications, RFI forms, access knowledge and create cases through the help center, upload application requirements, and view decisions. Application review processes depending on program and academic level will be implemented using core Education Cloud capabilities.

We recommend Mason select a **third-party event management** tool at the beginning of the project to implement in this phase and deliver event management capabilities and support conference requirements. This phase will include the creation of **Reports & dashboards** related to recruitment and admissions and other processes included in release 2. **Applicant communications** will be moved to Marketing Cloud using the strategies and approaches defined in the Student Success phase in Release 1. This development will include expanding the subscription and preference functionalities to support international communications by providing additional processes required for GDPR compliance.

The final iterative Design, Build & Test phase will focus on Recruitment and Admissions features and new functionality related to recruiting and application management, as well as onboarding these teams to features delivered during the Student Success phase, such as case management, chat, and appointment scheduling.

Advantages of Scheduling Recruiting & Admissions in a Later Phase

- Builds on the features implemented for student success.
- Accounts for the academic calendar for applicants, students, staff, and faculty.

Builds on the features implemented for student success.

Much of the functionality delivered to students during the Student Success phase, such as appointment scheduling, case management, and marketing journeys, will also be applicable to prospects and applicants. Thus, the foundation created during the Student Success phase will enable a faster implementation of the recruitment and admissions functionality.

Accounts for the academic calendar for applicants, students, staff, and faculty.

We designed our delivery team in a way that overlaps the phases to support recruitment and admissions discovery during the summer of 2024 when those activities tend to be reduced. We designed our delivery team in a way that overlaps the phases to support recruitment and admissions discovery during the summer of 2024 when those activities tend to be reduced.

Organizational Change Management



Organizational Change Management phase will start with the creation of a foundational change strategy to anchor the rest of the program. During Design, we will identify change impacts to help us understand what's changing. This process also helps us create detailed plans for training, marketing, communications, and engagement. We will then execute the plans and campaigns to raise awareness, desire, and knowledge prior to go-live.

Shortly before go-live, and into production, we will launch training delivery to enhance Mason end users' skills and abilities needed to successfully operate the system post go-live. Additional details can be found beginning in Section 7.0.

Figure 34 provides an overview of the estimated delivery schedule and related phases of our delivery process and methodology. We believe this schedule and approach will enable Mason to successfully navigate their Salesforce Student Lifecycle transformation and optimize collaboration opportunities by using an iterative process.

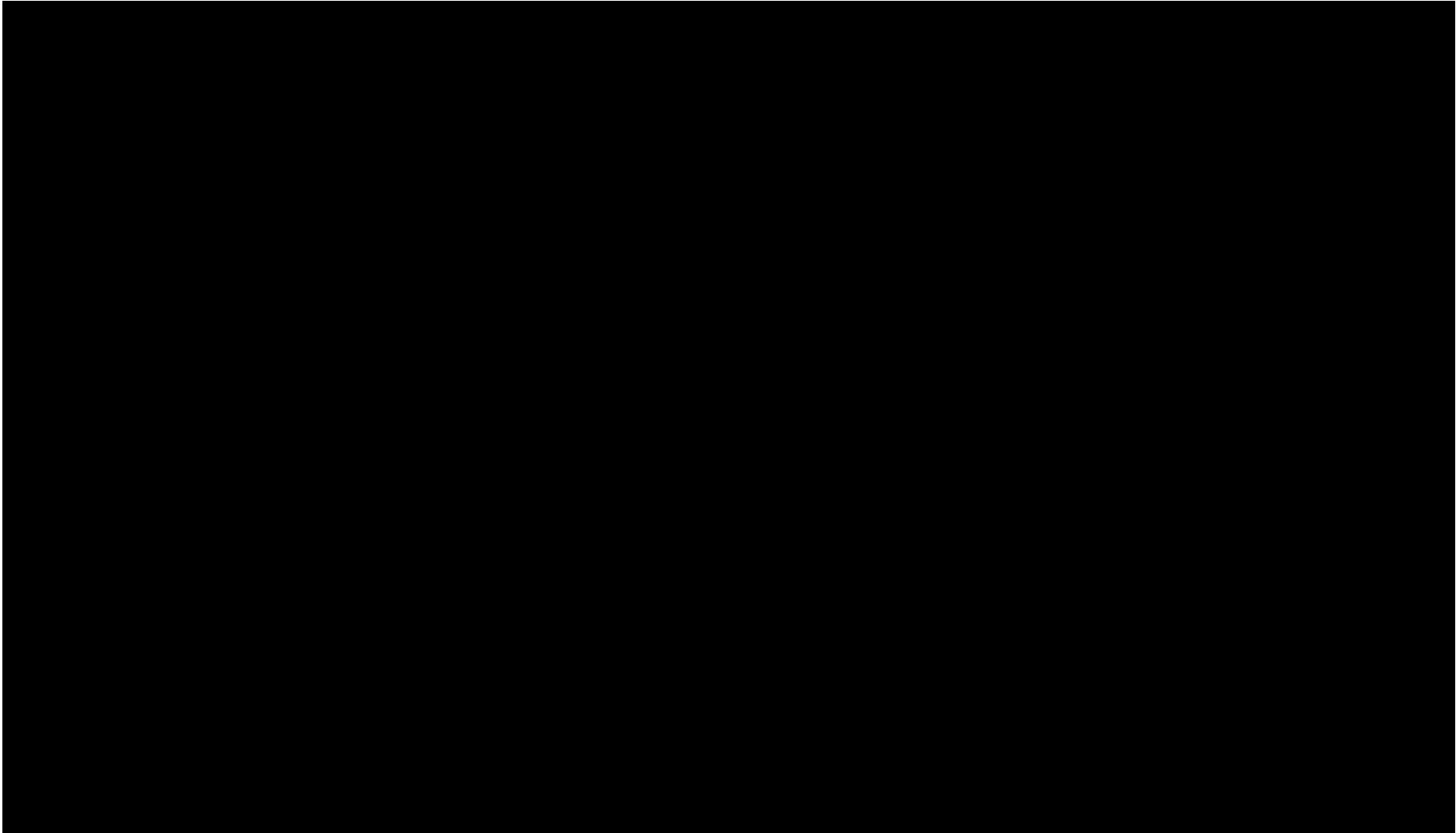


Figure 34. Our proposed Timeline is designed to meet your planned implementation dates and academic schedule

How Services Will Be Performed

Mason needs a partner to provide an iterative, collaboration approach to transforming your Student Lifecycle. Our team will collaborate and partner with Mason to navigate through the complexities of this change. In this section we will explain how we will use an Agile approach and an iterative design and development to:

- Show you quick wins along the way
- Improving the outcome for Mason through embedded collaboration
- Understanding the student “experiences”
- Managing change so that everyone impacted understands the why “what’s in it for me”

The following addresses the Student Lifecycle Transformation Statement of Work, Sections 6-11 to explain our specific plans for providing the proposed services outlined.





SDLC Approach (6.1)

Change is inevitable; our proposed approach embraces Mason’s unique landscape and changing needs as they materialize throughout the project. Our Project Manager, [REDACTED]

This Section addresses requirements outlined in Service Needs Section 6.1 SDLC Approach paragraphs 1-5

The Contractor shall utilize an Agile approach to System Development Lifecycle (SDLC) process to design, development, and implement the Mason system as well as to implement any fixes and enhancements. The Contractor’s approach must incorporate iterative methods for development and testing of software.










Please refer to a. Approach to Service, Agile Development Methodology with Work Intake and Prioritization, where we discuss our approach to Agile.

Mason’s Project Goals

This Agile methodology shall break the project into smaller work efforts to realize the following goals:

- Development and deployment of a functioning component(s) at the end of every iteration that build upon each other
- Enabling frequent demonstrations of completed components
- Building stakeholder support for the Mason system throughout the life of the project, including through regular UAT efforts
- Detecting dependencies, risks, and/or issues as early as possible to make course corrections.
- Early detection of missing, incomplete, or inaccurate requirements
- Early detection of flaws and vulnerabilities
- Meet approved project schedule deadlines
- Creating an environment that lends itself to responsive design to provide a seamless user experience regardless of device
- Facilitating on-going project team learning and continuous process improvement
- Independent module level testing and cross module testing
- Scheduled and on-demand demos
- Flexible number of iterations to accommodate all the prioritized requirements within a module

Our SDLC methodologies are grounded in project management best practices, from Project Management Body of Knowledge (PMBOK) to Agile and are continuously evolving to adapt to the latest developments in tools, technologies, and delivery expectations. We will work through multiple iterative design, build, and test cycles to bring in early and frequent hands-on interaction with the Mason teams, validating that the solution meets the business needs and expectations as the project progresses. Figure 35 describes how we plan to meet Mason’s goals outlined in the Service Needs section 6.1 SDLC, page 40 paragraph 1.

Goal		Meets
Development and deployment of a functioning component(s) at the end of every iteration that build upon each other		
Enabling frequent demonstrations of completed components		
Building stakeholder support for the Mason system throughout the life of the project, including through regular UAT efforts		
Detecting dependencies, risks, and/or issues as early as possible to make course corrections.		
Early detection of missing, incomplete, or inaccurate requirements		
Meet approved project schedule deadlines		
Creating an environment that lends itself to responsive design to provide a seamless user experience regardless of device		
Facilitating on-going project team learning and continuous process improvement		
Independent module level testing and cross module testing		



Goal		Meets
Scheduled and on-demand demos		
Flexible number of iterations to accommodate all the prioritized requirements within a module		

Figure 35. Accenture is invested in meeting Mason’s goals via our industry standard SDLC processes.

Requirements

Even though the functional modules shall be developed using an Agile methodology at different time intervals, functional implementations shall begin after all User Acceptance Testing and QA testing has been completed and approved by Mason for that release. Figure 36 describes how we will meet the requirements outlined in the Service Needs section 6.1 SDLC, page 40 paragraphs 2-4.




Goal		Meets
The Contractor’s Agile approach shall be based on known requirements realized and implemented using short cycles of analysis, design, development, and testing, enabling the system to evolve. An iteration is to be a distinct sequence of tasks focused on a desired goal within a time box, or simply multiple mini projects that are part of a project phase.		
The Contractor must create and lead an architecture-driven, iterative process that begins by prioritizing high-risk/high-payoff use cases within each module that have well-defined objectives and produce functionality ready for production release. Mason is expecting Agile development to occur on multiple modules simultaneously.		
The Contractor shall propose for Mason’s approval which module iteration to start first and the number of iteration cycles needed within each module. Each successive iteration must build on the work of the Contractor’s previous iterations to evolve and refine the system. The iterations can be released based on the Contractor’s project schedule.		
Even though the functional modules shall be developed using an Agile methodology at different time intervals, functional implementations shall begin after all User Acceptance Testing and QA testing has been completed and approved by Mason for that release.		

Figure 36. We will support Mason with an Agile SDLC delivery approach.

SDLC Deliverables (6.2)

This section describes the required minimum deliverables for the implementation by SDLC activity, unless otherwise approved by Mason. Given the Agile SDLC approach, the Contractor shall continue to keep each deliverable updated even after deliverable acceptance to reflect the latest progress in the project.

As part of the Implementation milestone, the Contractor must submit an updated version of all Discovery and Design deliverables with an asterisk (*) next to it for Mason review and acceptance at the end of Implementation (e.g., the Requirements Traceability Matrix must reflect the most updated information at the end of Implementation.) Payments to the Contractor will be triggered by the completion of three milestones: Discovery, Design, and Implementation.

We will bring to Mason the strong SDLC deliverables we provide for every Salesforce implementation engagement in higher education. We will also facilitate a collaborative and open dialogue to establish expectations and maintain transparency throughout delivery.

Prior to developing any planned deliverables, we will receive Mason approval of any deliverable's outline, expected content, and format. As deliverables are prepared, we will meet with stakeholders to understand criteria and establish expectations. We will then prepare, walk through, and review the draft and submit the final version for approval. The deliverable approval process is comprised of the following steps: prepare, walk through, submit and review before finalizing and submitting the deliverable.

Throughout the rest of the response, we have included in each section which deliverables listed in Section 6.2 SDLC Deliverables will be mapped to the appropriate activity and milestone. For additional information on how deliverables are created and approved please refer to Section 9.6 Project Management Deliverables.

Planning (6.3)

Requirements Confirmation Sessions. To ensure that the high-level functional requirements are accurate, the Contractor shall conduct the following requirements confirmation steps at the start of the contract:

We recognize Mason is on a journey to a more streamlined, accessible, efficient, and transparent student experience through the integration of existing Undergraduate and Graduate Salesforce orgs and transition to Education Cloud.

Section addresses requirements outlined in Service Needs Section 6.3 Planning paragraphs 1-3



There will be a dedicated timeframe for the Contractor and Mason to meet with the key stakeholders to review business process diagrams, user stories and high-level requirements developed by Mason. In these sessions, all parties shall review the expected features and build a common understanding of requirements with the Contractor's design team. This shall also give the Contractor an opportunity to validate the sequencing of their proposed schedule.

To set a solid foundation for this complex initiative, our approach begins with an End-to-End Discovery and Experience Design phase where we will work with Mason to review business process diagrams, align on requirements, mobilize teams, and refine our proposed project plan. During the Discovery and Design phase we will:

- Review business process diagrams, user stories, and high-level requirements developed by Mason.
- Review the expected features and build a common understanding of requirements.
- Validate the sequencing of the proposed schedule.
- Update requirements to reflect the feedback from the sessions.

The Contractor shall meet with program staff to review the high-level requirements and user stories. The Contractor shall update the high-level requirements to reflect the feedback from these sessions.

In addition to confirming requirements and schedule, Accenture will activate its project management and engagement plan in this phase, using two key program management groups: Product Owner Groups (POGs) and Project Workstreams to manage the program and engage with Mason's stakeholders.

Due to the size and scale of the initiative, we have found success in using functionality-focused Product Owner Groups and program-focused groups (project workstreams). Product Owner Groups are designed to allow each unit to communicate and confirm requirements. These groups are essential in finding cross-university alignment on key configurations. The POGs also provide a venue for a point-of-contact from each business unit to support communications, readiness, and change management initiatives - without overburdening central IT resources or causing decision stalemates with 'too many cooks in the kitchen.'

The Project Workstreams are designed to support all activities outside of the functional workstreams -supporting the technical design of the solution;

confirming and executing testing; delivering program-wide communications; leading readiness and change activities; delivering training; and running project management. In our experience, these workstreams are best supported centrally. For example, when a central IT team or a Central Marketing office, acts as a sponsor for the overall program.

The Design phase will conclude with an implementation kick-off with all product owners, project workstream leaders, and other identified George Mason leaders to communicate the program objectives, timeline, and expectation for the implementation (Releases 1 and 2).



Process + Experience Design

Taking an experience-led approach with these business processes will help to redirect the corresponding core functional requirements to meaningfully produce omni-connected moments for Mason students across the full journey.

By jettisoning the mindset of incremental innovation and embracing breakthrough approaches as a part of the fabric of the student lifecycle transformation journey, areas of opportunity discovered will enable George Mason to design a future state student experience journey that meaningfully delivers on each moment that matters. Leveled in the identified pivotal growth opportunities, we will marry the perspectives of relevant stakeholder groups: functional and technical, to validate high-priority business processes that are assumed to be *high-complexity, have significant gaps, and/or are critical focus areas on the student journey.*

Requirements Confirmation Sessions

The vendor shall schedule the Requirements Confirmation Sessions with the requisite time needed for thorough discussion. The Contractor must include time for the sessions in the project schedule. The end result of the Requirements Confirmation Sessions is a Requirements Confirmation Report that can be leveraged during subsequent sprints.

Our proposed Discovery approach focuses on framing an informed vision that outlines the elevated experience. This vision will guide what the university will do in the student lifecycle transformation and how we will bring it to life. We will meet with the Mason Stakeholders in Conference Room Pilots to walkthrough a student journey, using Salesforce out-of-the-box capability to confirm requirements. After the workshops are complete, during design we will playback designs to increase our precision as we move to Development, with the goal of creating a solution for each release. Please see a. Approach to Service, Agile Development Methodology with Work Intake and Prioritization to review our proposed Agile approach.

Deliverables

Prior to design beginning for any implementation and release, the Contractor shall complete the following planning documents based on their experience, proposed approach, and Mason input:

- Project Schedule
- Requirements Confirmation document

Accenture will work with Mason to align on overall project milestones and will clearly depict all requirements and discovery sessions in the project schedule. We will create a Requirements Confirmation Report accessible to Mason and Accenture team members that can be used during the subsequent sprints.

Requirements Management (6.4)

Requirements management shall be key to ensuring the Mason system is implemented with all the approved functional and technical requirements, and meets all Mason requirements.

Requirements play a key role in the overall success of an implementation. They serve as the foundation for future development and a key artifact for major decisions. Accenture's proposed process for establishing and implementing requirements relies on the utilization of tools that will be used throughout the project, including the Requirements Traceability Matrix (RTM).

Section addresses requirements outlined Service Needs Section 6.4 Requirements Management, paragraphs 1-3

The RTM, which is initially created in the Discovery Phase, documents the requirements, and will be maintained to track the bi-directional traceability between the requirements, the Salesforce product and the various analysis, design, build, and test components (e.g., use cases, designs, test conditions), product functions, components, business areas, etc., throughout the stages of the project. The RTM is intended to be a living document that is updated and maintained as business requirements change.

Implement and Maintain Requirements

The Contractor shall provide and implement application lifecycle management processes to manage requirements through the entire application lifecycle.

To maintain and manage requirements we recommend leveraging the testing management tool, Agile Accelerator, which will act as the gold source for all requirements. Requirements live throughout the lifecycle of the project and need to be tracked and traced, so each of them is addressed with the solution with standard functionality, configurations, integrations, reports, or business processes. This process allows all requirements, test conditions, test scripts, and defect tracking to reside all in one repository making mapping of testing to requirements simpler. This process will help reduce the overall risk of the project, and provide a clear process for establishing, implementing, and maintaining requirements. We will also partner with Mason to leverage any existing tools that are already being used (e.g., Elements Cloud)

Meet with Stakeholders

The Contractor shall meet with all relevant stakeholders to understand business processes and workflows, understand all Mason requirements, and develop functional and technical requirements.

We will use CRPs to help the stakeholders align on business processes and workflows, and requirements. Via CRPs and discovery process we will confirm functional and technical requirements.

Functional and Technical Requirements

The Contractor shall build detailed functional and technical requirements with relevant stakeholders through each sprint.

The functional and technical requirements will be verified, created, or updated during the Design phase. With the Agile approach we will meet with Mason Stakeholders during the Conference Room Pilots. We will confirm the requirements as we walk through the student journeys and demonstrate how the touchpoints will be achieved in the Salesforce ‘out-of-the-box’ capability.

Requirements Traceability Plan and Matrix

The Contractor shall provide a Requirements Traceability Plan and Matrix that also includes a methodology for starting and maintaining system certification traceability from the start of the project through to implementation. Included in the plan must be relationships between business rules, policy, design, testing, reporting, and platform rules.

We will create a Requirements Traceability Plan and Matrix that also includes a methodology for starting and maintaining system certification traceability from project kick-off to implementation. The purpose of defining a requirements methodology and Matrix is to provide stakeholders with an explanation of how we will work through identifying gaps, fits, configurations, and customizations that will be necessary in each phase of the project. Figure 37 is an example of our Requirements Management Methodology and Template that we will tailor for the Student Lifecycle Transformation.

We work with the client to determine the final requirements, assign each one a unique identifier, and record it in the RTM to be tracked throughout the system development lifecycle. We use these unique identifiers in all applicable documentation (e.g., design documents, development packets, test conditions, test scripts, and system investigation requests).

Track Requirements

Throughout the project, the Contractor must trace each functional and technical requirement from its origin through implementation.

Using the RTM, we will trace each business requirement throughout the development process. These requirements will guide our design of the system and the interfaces and our RICE document development. They will become the basis for our test scripts. Before system cutover and deployment, we will validate our achievement of your business requirements during user acceptance testing.

Maintain Requirements

The Contractor must track and maintain a record of changes to requirements and/or development artifacts for the historical record and certification traceability.

During the project design, development, testing, or deployment, if there are requests for modifications or new functionality that do not map back to a defined requirement, that could indicate possible scope changes. We will work with you to identify, log, investigate, estimate, and approve or reject scope changes.

Vision and methodology for documenting and maintaining traceability

The Contractor must provide a vision and methodology for documenting and maintaining traceability throughout the Agile software development lifecycle, and back to source requirements.

<CLIENT SOLUTION>
Requirements Methodology and Template

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Figure 37. The requirements documentation methodology will use Accenture’s CRP Process.

We will work with Mason's Project Team to fully understand the requirements presented in the Requirements Traceability Matrix during Design Phase. These requirements are documented within Agile Accelerator where they will be monitored by the Project Management Office.

We will document the requirements during Discovery, trace the requirements in Agile Accelerator during Design, and then trace those requirements to the code and track to the component test scripts. During testing we will trace the requirements to the assembly, product, performance, and user acceptance test scripts.

Incorporating Changes

The Contractor shall be responsible for incorporating approved changes to the requirements and completing all traceability activities throughout the project.

Approved changes to the requirements will be updated in Agile Accelerator. Since we track each activity, the changes will be seen going forward. We will also get insights into adjustments needed to the code, assembly, product performance, and user acceptance test scripts.

Deliverables

Deliverables. The Contractor shall develop and keep updated the necessary requirements artifacts to successfully design, develop, and implement the Mason system. These deliverables include, but are not limited to, the following:

- Requirements Document(s)
- Requirements Traceability Plan and Matrix (RTM)

We will develop and keep updated the necessary Requirements Traceability artifacts to successfully develop and implement the Mason system. These documents are particularly needed for conducting the impact assessment of requirements changes on the project plans, tasks, and work products. We will identify and resolve any inconsistencies between the requirements and other project deliverables.

Design and Development (6.5)

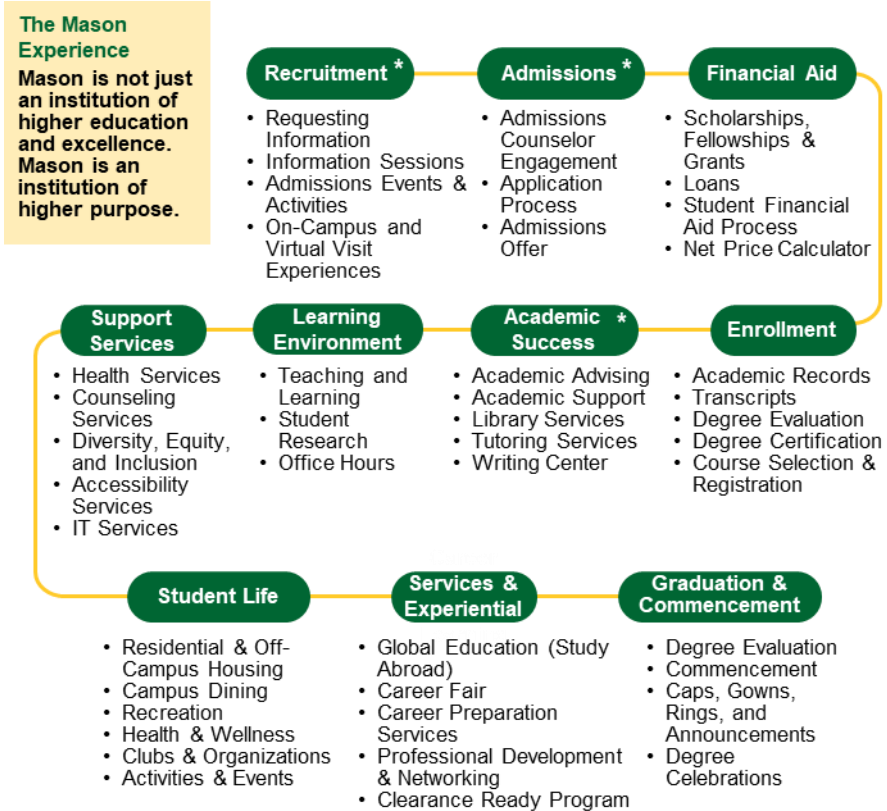
Design and development document all areas of the transformation approach from the vision, project description and requirements, to a clear schedule of the timeline, project monitoring, desired deliverables, and potential revisions.

Section addresses requirements outlined in Service Needs Section 6.5 Design and Development, paragraphs 1-5



Therefore, the quality of the project largely depends on how well the vendor can understand Mason’s needs and goals. As a result, an effective design and development approach is essential to everyone - product owners, stakeholders, managers, and development teams.

For this phase, we plan to use Conference Room Pilots (CRP) workshops where we bring together team members across George Mason (e.g., IT, Data, Business, and Enrollment) with Accenture and review the requirements to create user stories. In these workshops we will look at the student journey and discuss different touchpoint ‘moments of truth’ and how the Salesforce cloud can support that activity, as reflected in Figure 38.



* in scope for the Student Lifecycle Transformation GMU STL 23.0077

Figure 38. Our team will come together to demo the “Out-of-the-Box” tool to help Mason articulate their needs in the context of the Salesforce capabilities and avoid customization.

Using this approach Mason will be able to avoid unproductive conversations. Our skilled Design Thinking team will understand where debate adds value on critical items and where it is unproductive. We will address how to support Mason in the design and development of the Student Lifecycle Transformation.

Design and Development Plan

The Contractor shall create and execute a Design and Development Plan aligned with the selected Agile methodology prior to initiating any design or development activities. The plan shall include but is not limited to the following:

- Purpose and Scope
 - Relationship to other plans
 - Resources - Roles and Responsibilities
 - Design and Development Approach
 - Assumptions and Constraints
 - Methodology Tools and Techniques
- Design
 - Agile Software Design Process and Standards – frameworks, future growth, User Interface (UI) design standards, interface standards.
 - User Considerations - characteristics, problem objective, workstation.
 - Design Tradeoffs
 - Handling of Critical Requirements
 - Safety and Security Assurance
 - Detailed Design
 - Reusable Software Products - incorporating and developing reusable software products, procured software
 - Risk Management
- Development
 - Agile Software Development Process – Sprint process overview, Sprint work package/software reviews, technical documentation, deliverables, deployment process.
 - Establishing Software Development Environment - developer workstation, software development library/files, and relationship to Software Configuration Management Plan.
 - Application Development Coding Standards - automatic code generation, code reuse, link/reference to external coding standards documentation.
 - Unit Testing - approach, use of testing frameworks and automation, peer reviews, metrics and measurements.
- Application Integration - revision and retesting, work package/system integration, work package/software release/ implementation planning.

Design and Development describes all the phases of the process - analysis and planning, ideation, design and development, deployment, production and launch, and maintenance. We will create and execute a Design and Development Plan that will include the topics outlined in Figure 39 and are aligned to section 6.5 in Service Needs, paragraph 1.



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Figure 39. Design and development plan will address Mason's service needs.

The Design and Development Plan is an essential part of the development process because it sets the foundation for the entire project. It helps to define the architecture, components, modules, interfaces, and data for a system to satisfy specific requirements.

Conceptual Design

It is critical that all project releases are thoroughly planned and executed well. Prior to beginning design activities, the Contractor shall complete the Conceptual Design that verifies infrastructure components can be installed and integrated successfully.

Conceptual design is an initial/starting phase in the process of planning, during which the broad outlines of function and sort are coupled. It tells the customers what the system will do. We will produce the conceptual design during the early stages of the project. Our team will partner with Mason during our discovery phases to align on a high-level conceptual design to help guide our teams through execution. This is critical for the teams to have a beacon to follow.

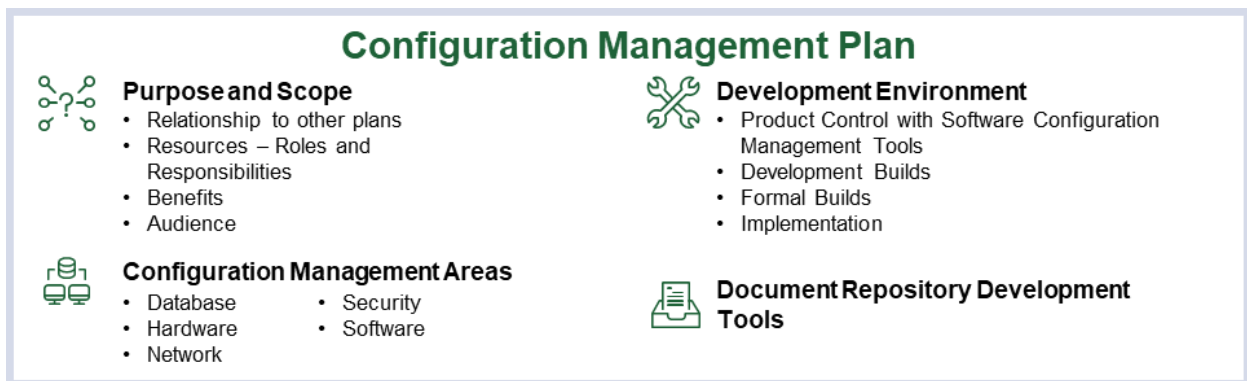
Configuration Management Plan

The Contractor shall create and execute an Agile Configuration Management Plan. The plan shall include but is not limited to the following:

- **Purpose and Scope**
 - Relationship to other plans
 - Application Design and Development Plan
 - Data Management Plan
 - Hardware and Software Plan
 - Master Test Plan
 - Security Plan
 - Service Governance Plan
 - Resources - Roles and Responsibilities
 - Benefits
 - Audience
- **Configuration Management Areas:**
 - Database – Organizing structural configuration and metadata settings
 - Hardware – Ensuring performance and functionality settings
 - Network – Coordinating multi-vendor device compliance

- Security – Enforcing the hardening and compliance standards
- Software – Managing code promotion / releases and auditing
- Software Configuration Management (SCM) Procedures
- Configuration Identification - Software Product Classification, Test, Release, Build,
- Baseline, Source File, Document, Change Request
- SCM, and Project Repositories
- Configuration/Change Control – change tracking, change record definition and types, change request attributes
- Status Accounting and Reporting
- Configuration Audit/Verification – audits, build audits, test readiness review (TRR)
- Release Administration and code promotion
- Archive, Storage, Backup and Restore
- Development Environment
- Product Control with Software Configuration Management Tools**
- Development Builds
- Formal Builds
- Implementation
- Documentation Repository Development Tools

The configuration management plan will be created to serve as a comprehensive document detailing the configurations of the Student Lifecycle Transformation. We will use the plan to determine how to handle any changes in configurations that will include the topics outlined in Figure 40, aligned to Section 6.5 in Service Needs, paragraph 3.



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Figure 40. A good plan needs to clearly define the components that will be configured, how we will control changes and report the status of change, and verify that outcomes are successful.

The configuration management plan is important because it can help everyone involved with the project understand what is needed to change. It also helps teams create strategies for developing deliverables and completing projects successfully. A good plan needs to clearly define the components that will be configured, how we will control changes and report the status of change, and verify that outcomes are successful.

Design and Development Execution

In executing the Design and Development Plan, the Contractor shall be responsible for the leading all design, development, and configuration activities, including but not limited to the following activities:

- Lead architecture, design, development, and configuration discussions.
- Organize and conduct design sessions with subject matter experts.

- **Develop the technical environment specifications for the Mason system.**
- **Apply consistent development standards including coding, database, and field naming conventions, in alignment with industry standards.**
- **Perform necessary configuration, development, and testing required to implement the functional and technical design.**
- **Provide Mason with access to both source/object codes for software components and documentation. Note: All new software functionality built on top of any COTS software shall be owned by Mason.**
- **Produce updated system documentation.**

The activities for design and development let Mason prepare product designs that attract your target audience. In executing the Design and Development Plan, we will be responsible for leading all design, development, and configuration activities addressed in Section 6.5, paragraph 4, reflected in Figure 41.








Goal		Meets
Lead architecture, design, development, and configuration discussions.		
Organize and conduct design sessions with subject matter experts		
Develop the technical environment specifications for the Mason system		
Apply consistent development standards including coding, database, and field naming conventions, in alignment with industry standards		
Perform necessary configuration, development, and testing required to implement the functional and technical design		
Provide Mason with access to both source/object codes for software components and documentation. Note: All new software functionality built on top of any COTS software shall be owned by Mason		
Produce updated system documentation		

Figure 41. We will complete the design, development, and configuration activities.

Deliverables

The Contractor shall develop and keep updated the necessary requirements and design artifacts to successfully develop and implement the Mason system. These deliverables include, but are not limited to, the following:

- Architectural Vision
- System Traceability Model
- Design and Development Plan
- Process Flow Document(s)
- High Level Design (HLD)
- Solution Detailed Design (SDD)
- Solution Architecture Design (SAD)
- Functional and Technical Design Documents
- Configuration Management Plan
- Business Use Case(s)
- Business Rules Documentation
- User Interface Specification(s)
- Interface Design Documents
- System Security Plan, including security specifications
- Reports and Forms Design Documents
- Process Flow Document(s)
- Glossary of Terms and Acronyms

Design deliverables are not only a way to verify the project plan but are critical to including Stakeholders in the process. These deliverables help everyone understand the system that will be designed (and what is or is not possible within that system). We will create and execute a Design and Development deliverable that includes the topics outlined in and aligned to section 6.5 in Service Needs, paragraph 5.



Testing (6.6)

We understand that testing is not a check box filled in at the end of the project Design and Development phase, but rather a thoughtful, comprehensive, ongoing strategy with corresponding activities that minimize risk by exercising areas like usability, requirement fit, and performance of the solution prior to implementation.

Section addresses requirements outlined in Service Needs Section 6.6 Testing, paragraphs 1-3

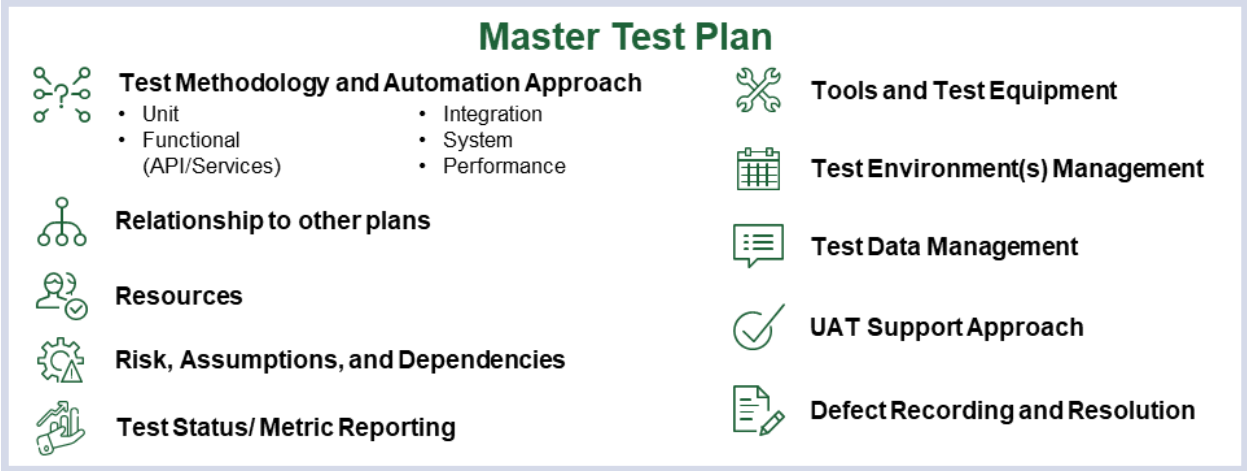
Master Test Plan

The Contractor shall create the Master Test Plan with Mason input and shall receive Mason approval before finalizing the plan. At a minimum, the plan shall include the following information:

- Agile Testing Methodology and Automation Approach for the following types of testing expected for Mason:
- Unit
- Functional (API/Services)
- Integration
- System (includes Web Services, Regression, Security, Browser/Operating System Compatibility and Mobile)
- Performance
- Relationship to other plans
- Resources - Roles and Responsibilities
- Risks, Assumptions, and Dependencies
- Tools and Test Equipment – including API Testing, Test Management, Automation and Performance and any additional hardware/software
- Test Environment(s) Management - including approach to mocking and service virtualization
- Test Data Management
- UAT Support Approach
- Defect Recording and Resolution
- Test Status/Metric Reporting (e.g., Burndown charts, Velocity, Cumulative Flow, etc.)

During the Discovery phase we will develop the Master Test Plan with Mason's input and will receive approval before finalizing the plan. In general, the plan describes test events and activities to plan, script, and execute, objectives and approaches, requirements mapped to the requirements traceability matrix, tools, environment, data, entry and exit criteria, test cases and regression, defect resolution, metrics, risks and contingencies, roles and responsibilities, plan maintenance, determining how the test environment will mirror production, and outlining any enhancements made for the upcoming version.

Figure 42 describes the information that will be included. The plan is aligned with the Agile methodology and addresses the topics listed in section 6.6, paragraph 1.



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Figure 42. Testing approach to validate sprint outputs.

Accenture's rigorous application testing approach is informed by experience in successfully maintaining and operating systems. Our approach helps avoid production defects that are costly and that can negatively impact recipients and agency worker productivity. We understand testing can be challenging and complex due to several reasons:

- Identification of critical business processes affected by change events
- Lack of standard testing scenarios inventory
- Lack of appropriate stage gates between various tests
- Dependency on various process teams to test end-to-end business processes
- Maintaining updated test documentation
- Availability of test environment(s) and appropriate test data

Testing Activities

Mason will own the Master Test Plan after it is approved. The Contractor shall support all testing activities and execute testing activities assigned to them. This includes but is not limited to the following activities. (Note: Types of testing shall depend on the features in the iteration.)

George Mason is looking for a partner who can provide a roadmap to improve the effectiveness of testing activities. Testing is an essential part of the application lifecycle and is a critical means of improving software quality. Our rigorous application testing approach is informed by experience in successfully maintaining and operating systems, while avoiding production defects.

Manage test cycles, tracking progress and producing progress and quality reports.

We will test in sprints as we develop our solution, as shown in Figure 43, as part of the Build and Test phases. The development and QA teams will execute unit tests and system tests and, following the Development phase, end-to-end tests. The teams will then execute performance tests and UAT.

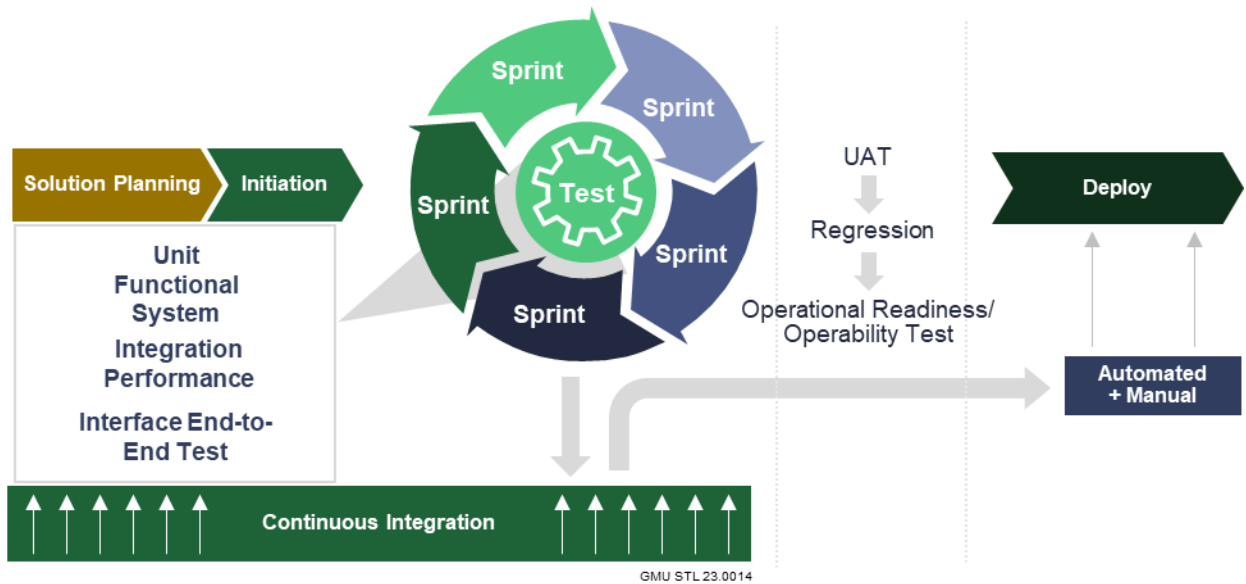


Figure 43. Automated Agile Sprint Test Approach facilitates validation of sprint outputs.

Mason will see increasing benefit from our testing approach as the testing cycles decrease over time and the State realizes benefits from process automation. We integrate testers into the scrum teams so configurations can be tested as they are deployed. This process promotes early test planning and review with the build teams and enables a parallel test-driven development. The testers focus on designing and creating manual test scripts based on the sprint targets test code and executing the unit as soon as the code is deployed.

Tracking Progress

We will track the testing progress and produce progress using Agile Accelerator. We will track severity of defects and provide quality reports.

The Test Lead will use metrics to assist in communicating the status and progress of each testing phase. Each day, the Test Team will be responsible for logging scripts and/or passes completed and any new defects discovered to confirm the validity of these metrics. Weekly status reports are sent out to Project Managers, Project Team Leads, and other interested parties.

Conduct the following tests at a minimum before each Phase Implementation: security test, system end-to-end test, conversion test, Operational Readiness Review (ORR), pilot implementation test, and implementation test.

We will perform testing cycles using the approach described in Figure 44 before each Phase Implementation.

Testing cycle	
Security test	



Figure 44. George Mason can see continuous and early benefits from our testing approach, which considers risk, communication, and effectiveness.

Develop test scripts in collaboration with Mason. Assist Mason in developing UAT test scripts when requested.

To support Mason with UAT, we will develop test scripts in collaboration with Mason. The scripts will document the step-by-step instructions a user must follow to execute a test scenario and its associated test conditions. To complete the UAT we recommend bringing the testers to one central location for test script execution to allow for more effective support during the UAT process.

Support the testing environment including, but not limited to, creating the test datasets, creating de-identified test data sets, and resetting the test data to support the re-running of test scripts.

The Testing and Development teams shall have designated environments separate from Production. The environments to support each phase of the SDLC will be built and maintained, reflected in Figure 45. This plan will be modified during System Design to accommodate Mason-specific requirements.

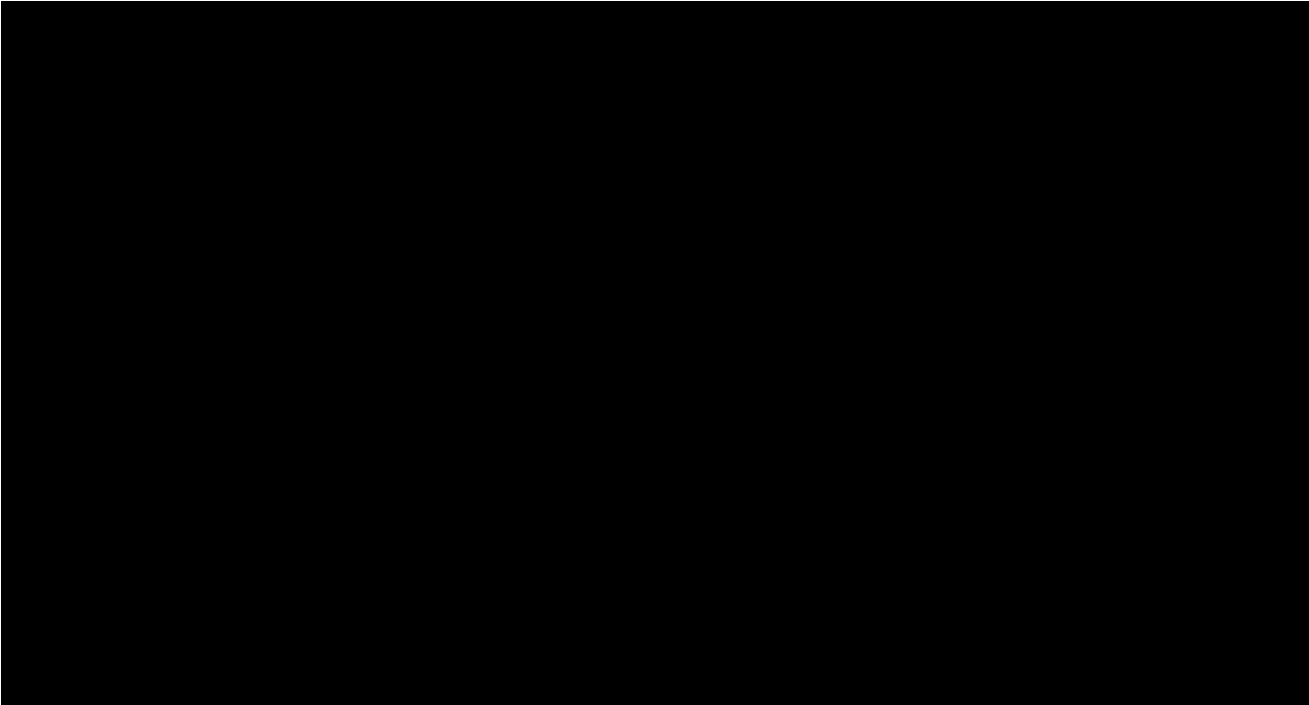


Figure 45. The teams will perform testing or development in a comprehensive test environment.

Provide defect management tool(s) and procedures for tracking, managing, and reporting system defects during testing.

Accenture uses our Defect Management approach to control defects and make the products, systems, and services free of defects. Our approach provides guidelines on how to properly handle defects identified during system testing, regression testing, user acceptance testing.

When the Level 2 and Level 3 teams identify a defect, they will be logged and tracked to completion, as illustrated in Figure 46.

We will rate the defects across one dimension in Assembly Testing and two dimensions (business severity and technical severity) in subsequent phases. We will then work to resolve defects.

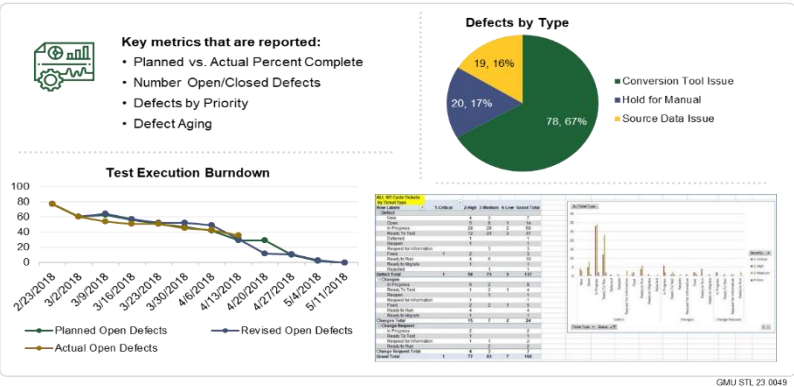


Figure 46. Our defect management and reporting process will keep track of the defect from the initial discovery to its successful fix.



Testing Severity—How impactful is this defect in proceeding with a testing effort that stabilizes our solution and minimizes major impacts?



Business Severity—How impactful is the unresolved defect to business operations?

Mason’s stakeholders review and approve the defect resolution process, which focuses on the various stages from “New” to “Closed” and the different roles/actions throughout the process. One of the critical tenets of the defect management process is a clear division of responsibility between the team that finds the defect and verifies it has been fixed (the State’s Test team), and the team that fixes the defect (the Development team).

There will also be a process established on when a defect can be placed on hold, deferred, or recommended for change control board review. This process is used for defects stemming from unit test through go-live. We illustrate our process for defect management and corrective maintenance in Figure 47.

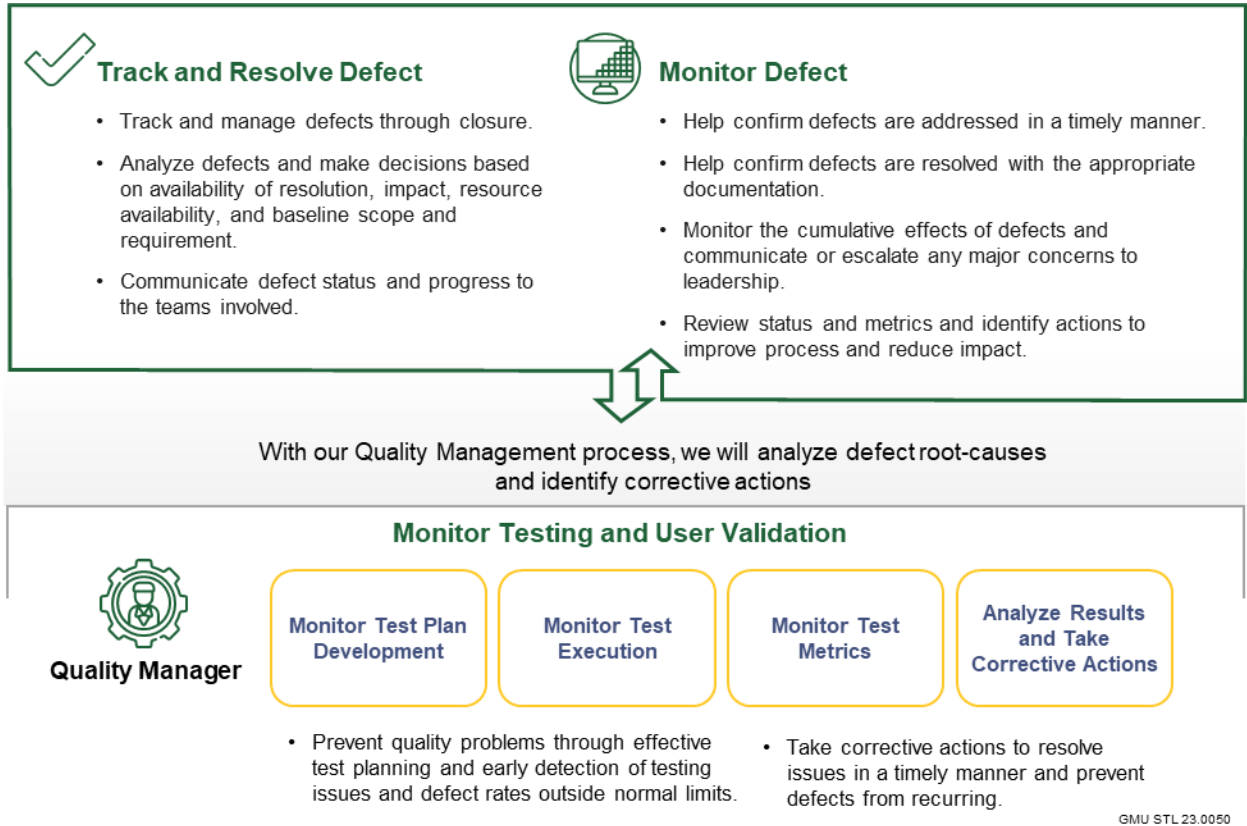


Figure 47. We will help confirm defects are resolved with expected results.

Automate testing where possible. Utilize automated testing tools to increase test execution speed and accuracy within the testing phases.

A significant differentiator to our testing solution approach is the use of test automation which increases testing accuracy, improves test quality, expands testing coverage, and provides overall testing efficiencies. We will use Accenture’s ‘Self-Healing Test Automation’ proprietary asset, the key features of which are reflected in Figure 48.

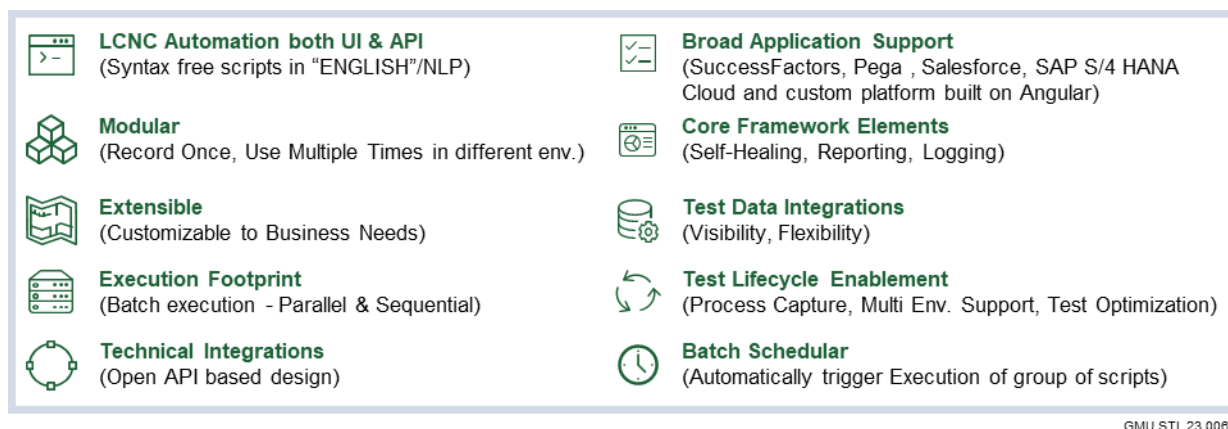


Figure 48. The SHTA promotes automation and quality, and reduces issues and risks.

Based on Accenture's experience in automation testing with multiple clients across the world, we have designed a Test automation solution that addresses the following aspects:

- Speeds up automation script development using an intelligent script designer built using NLP and Machine learning. It records human actions, instantly identifies application objects. Secondly, plays back the same scenarios automatically using Selenium and custom JS packages.
- Maintenance of automation scripts by auto healing the scripts at runtime by using Self-healing algorithm, which update the right object properties in the script. This also confirms reduction in False positives.
- Use Machine Learning algorithms to identify changes in the UI before during the test execution and adapt the automation test script for modified UI.

Based on our current understanding of Mason requirements, Figure 49 illustrates our proposed automation approach for UI and API automation.

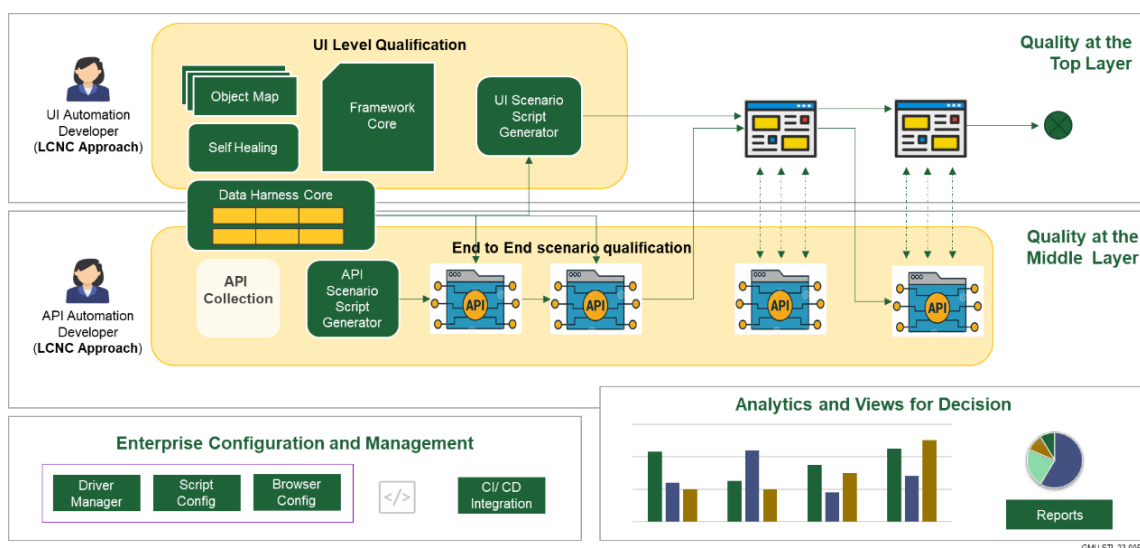


Figure 49. The Data-Twin platform incorporates digital twin technology enabling automation of processes.

Train Mason staff involved in testing on the system and test procedures.

Mason’s team members will be trained on the testing methodology and tools specific to the testing stage. Our team will conduct kick-off meetings, as needed, to facilitate team communication regarding processes, procedures, deliverables, schedules, and deadlines. Additionally, Mason’s project team members will be trained on system navigation and processes to allow independent processing of test scripts. The training material will be created for key test components listed within Figure 50.

Training Material	Audience
Test Plan	All Levels
Test Conditions	All Levels
Test Cycle	All Levels
Test Scripts	All Levels
Testing Tools (Rational Tools)	All Levels

Figure 50. Documents will give team members a high-level overview of testing objectives and put each testing phase in perspective within the testing life cycle.

Run validation and testing software against external facing Internet applications to help identify potential security issues and repair any deficiencies found during this testing.

Application Vulnerabilities can exist in two levels: Vulnerable Code and Application Behavior. We will run validation and testing software against external facing internet applications to detect code vulnerabilities with Static Application Security Testing (SAST), Dynamic Application Security Testing (DAST) and Hybrid scanners. For application vulnerabilities, security specialists will perform Penetration (PEN) Tests and manual analysis. Any vulnerabilities identified will be repaired and tracked as a deficiency during this testing.

Support User Acceptance Testing (UAT) when requested. This may include at a minimum:

- Provide system training to UAT participants.
- Deploy the relevant iteration functions in the UAT environment.
- Provide assistance to develop test data and test scenarios.
- Provide and support the UAT participants’ user IDs and passwords.
- Assist in populating the data in the UAT environment.

UAT helps impacted user groups verify that the system addresses the approved requirements and design. Mason will lead the UAT execution with support from Accenture, illustrated in Figure 51.

Test phase	
Provide system training to UAT participants	
Deploy the relevant iteration functions in the UAT environment	

Test phase	
Provide assistance to develop test data and test scenarios	
Provide and support the UAT participants' user IDs and passwords	
Assist in populating the data in the UAT environment	

Figure 51. We will support Mason’s UAT tasks to comprehensively test the solution.

Defects discovered during UAT will be prioritized by the UAT Team based on importance to the user, impact on business operations, and impact on the application. The UAT Team will document and present to Mason stakeholders the results of the test and assist in the sign-off process.

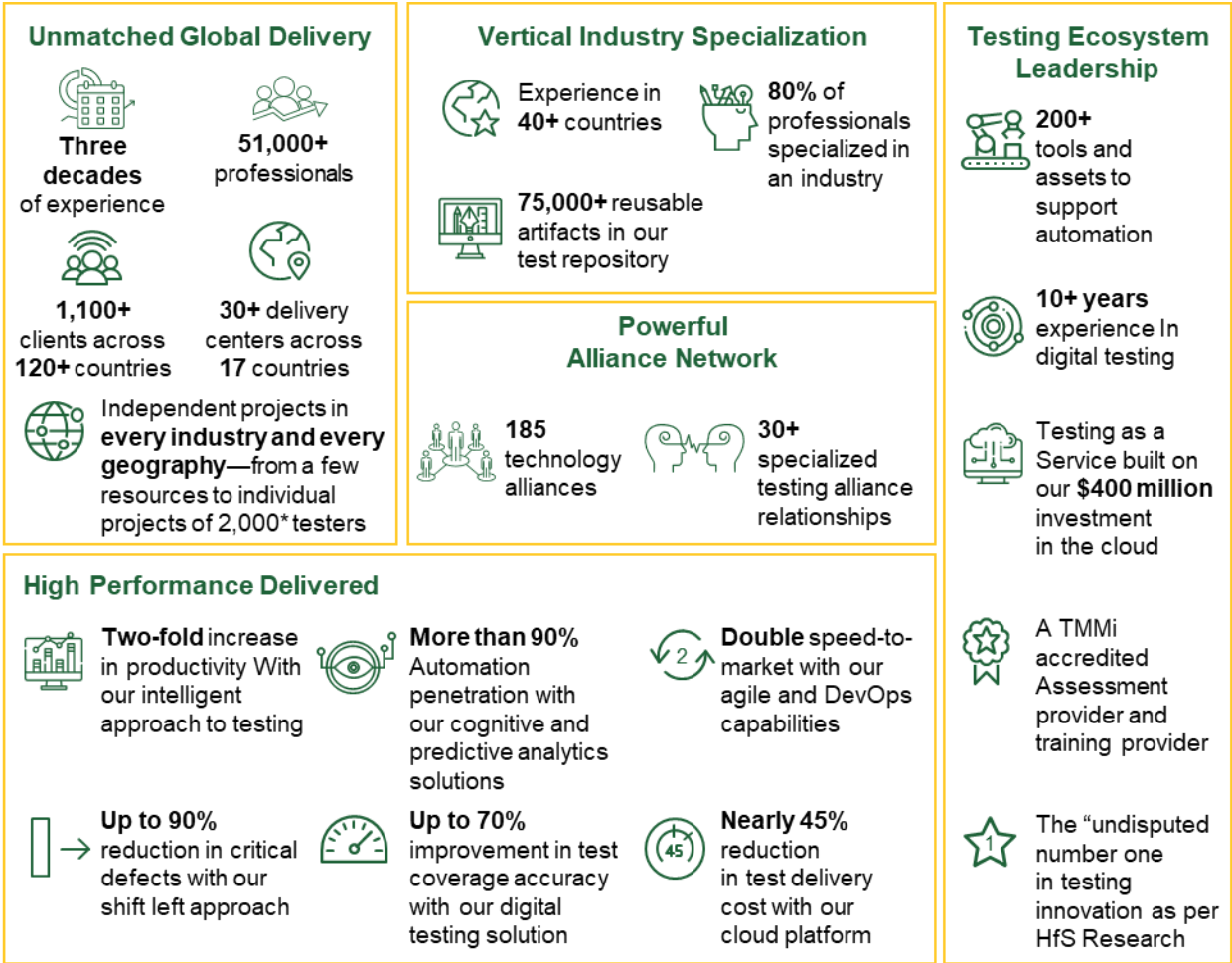
Deliverables

Refine, update, and make available all test documents, procedures, and scripts throughout development and through full system acceptance to reflect the current requirements.

Deliverables. The Contractor shall develop for following testing-related deliverables at a minimum:

- Master Test Plan
- Draft Automated Testing Scripts
- Final Automated Testing Scripts
- Test plans for each testing phase
- Draft Test cases
- Final Test cases
- Completion of all applicable testing cycles
- Draft Security Test Plan report
- Final Security Test Plan report
- UAT Report and Results
- Draft System Integration Test Readiness Checklist
- Final System Integration Test Readiness Checklist

Test scripts, documents, and procedures will be refined and updated throughout each testing phase so that the next test phase or sprint will build off the previous cycle. This process results in improved efficiencies and reflects the current requirements. Our test approach will include creating a deliverable requested in the Service Needs Section that will be reviewed and approved by Mason. Figure 52 highlights Accenture’s testing capabilities.



GMU STL 23.0052

Figure 52. Accenture’s extensive testing capabilities serve Mason’s key outcomes.



Data Integration, Conversion and Migration (6.7)

The Data Conversion and Migration Plan describes the strategies, approaches, and processes used to convert data from the source systems into the target system. Our previous experience provides recommended best practices that are consolidated into our comprehensive methodology for Data Conversion. This process includes developing a Data Conversion Strategy, Data Conversion and Migration Plan, which utilize our Documentation Templates. Our teams build upon these field-tested plans, templates, and tools to provide a consistent, predictable outcome for data conversion. These same learnings and similar strategies also apply to Data Integration. As we look to define the sources, targets, and data mappings of both the Conversion and Integration scopes, the learnings, templates, and processes remain the same while the sources and targets are the fundamental difference.

Section addresses requirements outlined in Service Needs Section 6.7 Data Conversion and Migration paragraphs 1-2

In the initial Discovery Phase, we work to start defining in detail how we will move the data, how and where we need to change/update data and provide the overall Conversion and Migration Strategy as well as the Data Integration Strategy. This process leads us into defining the plan and steps required to achieve the overall goals. As part of this phase, we also start profiling and looking at the data that will be moved to help align multiple deliverables coming in the next phases. These deliverables are as follows: Data Dictionary, Data Quality Rules, Critical Data Elements (CDEs), and Data Mapping. All these deliverables have direct impact on both the Conversion and Migration building and testing components as well as on the Data Integration components.

During the Discovery and Design phase, the Conversion and Integration resources define the Conversion Architecture and Approach as well as the Integration Architecture and Approach. Both teams will be performing data analysis of critical data elements (CDEs), data quality, fields, and tables. During the Build phase, we perform the Extract, Transform, and Load (ETL) development, balancing and reconciliation jobs. Any Validations/Reports that will be used in the Conversion and Migration Strategy or Integration Strategy will also be developed.

As we move into the testing and validation phase, we will perform testing of the ETLs, validation mechanisms (tools and/or reports), balancing and reconciliation, and provide test data support.

Data Conversion and Migration Plan

The Contractor shall create a Data Conversion and Migration Plan, including:

This deliverable defines the strategy for performing data conversion and migration activities, including data cleansing, extracting, transforming, loading, migrating, and validating conversion data. Figure 53 describes the information that will be included and is aligned to the topics addressed in section 6.7, paragraph 2. As the team progresses with conversion design, development, and testing, the outcomes are included as artifacts to the Data Conversion

Plan. This process results in a complete set of documentation pertaining to the data conversion effort aligning to each phase.

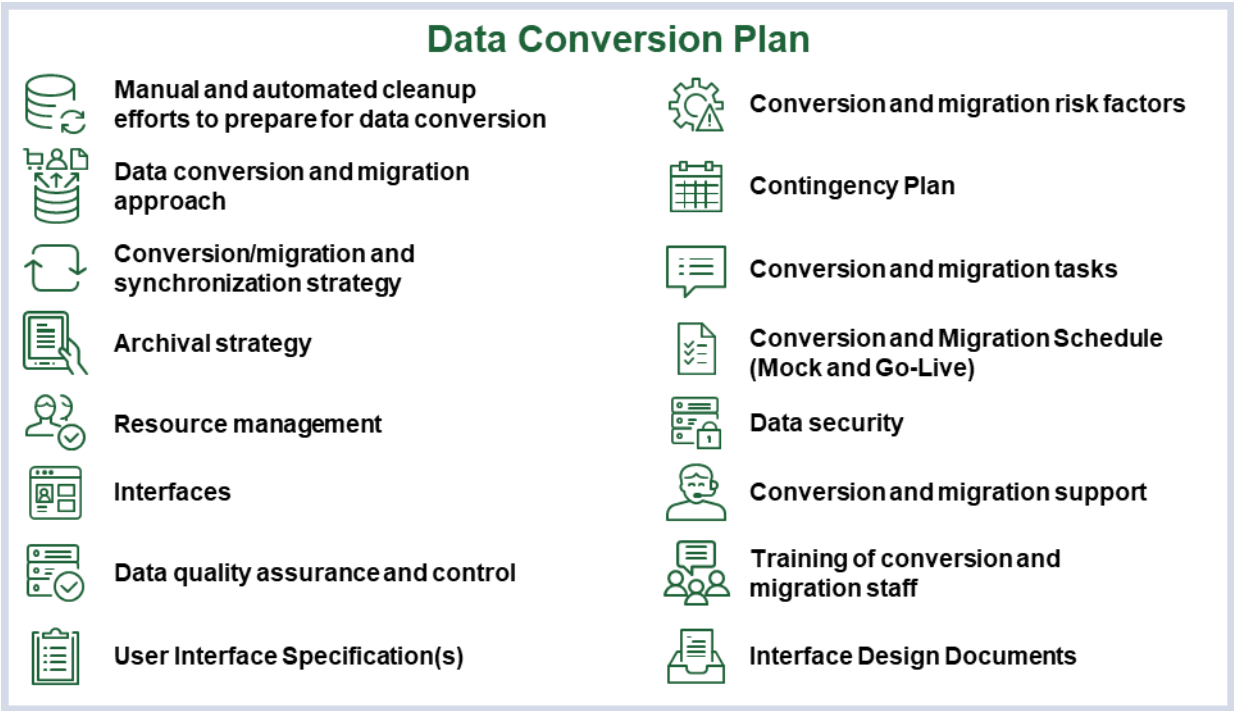


Figure 53. The Data Conversion and Migration Plan represents the design specifications that guide the development of the automated conversion process.

Deliverables

We will develop for following data conversion and migration-related deliverables per the RFP along with other deliverables:

- Data Conversion and Migration Plan
- Data Dictionary, Data Models, Data Flow Models
- Draft Conversion and Migration Results Reports
- Final Conversion and Migration Results Reports

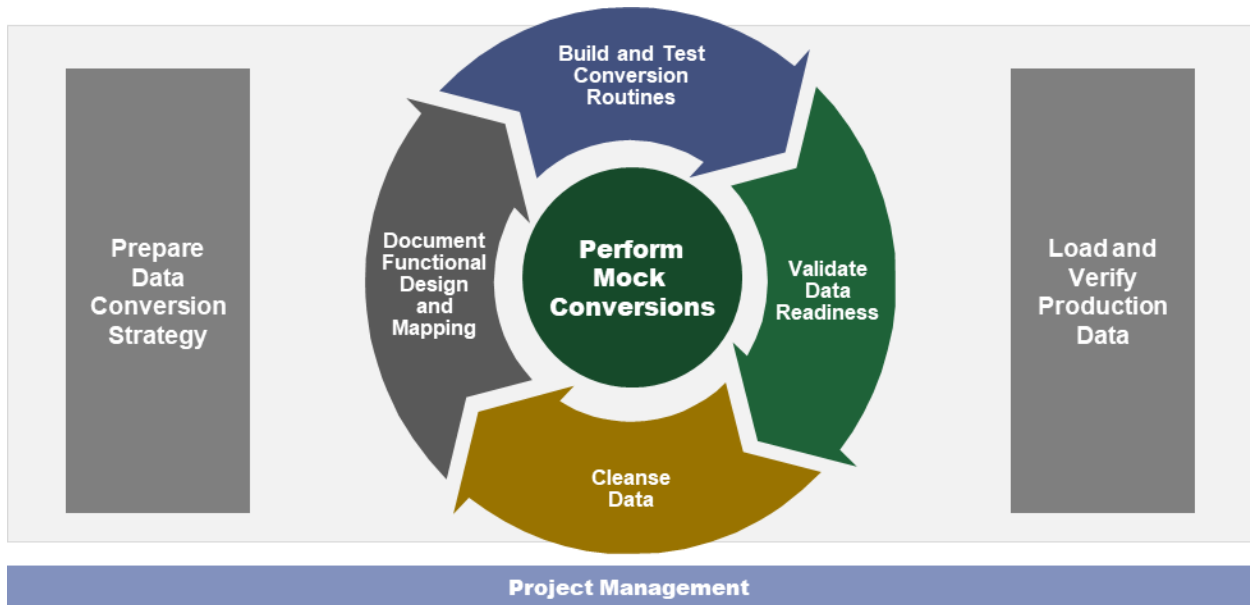
We will develop and regularly update the necessary requirements and design artifacts to successfully develop and implement the Mason system. The solution provided will be a repeatable process, automated as much as possible for the Conversion and Migration items, and easily updateable when new requirements are discovered throughout the iterative process. We will start with industry leading standards, templates, and processes then tailor them to meet Mason’s requirements. Our Guiding Principles are as follows:

- **No Disruption:** Consistent, seamless process through deployment.
- **Start with Standard:** Map Standard to requirements at the start, fill gaps as required.
- **Gain Insights Early and Often:** Start Profiling in the Discovery, Frequently Assess, fix data at source whenever possible, add Data Quality rules where automation can be utilized.
- **Manage the Change:** Anticipate and incorporate changes.

- **Load Right:** Multiple Mock Loads to test not only the conversion process but also the rules and validate the data is coming out as expected. This method will help to Minimize Production Loads and delta loads after a go-live. This process requires us to maximize data readiness checks via reports, dashboards, and Mock Loads to catch errors early and often.

Mock schedules to align with program platform readiness and handover processes so that we can test and validate production cutover tasks and steps as well as validate data load tools and the data itself multiple times, giving us time to address issues before the final Conversion is started.

Figure 54 describes how our Iterative Data Processes for Conversion and Migration processes flow. Integration and Orchestration is very similar with the only change being testing happening after the Mock Conversion:



GMU STL 23.0038

Figure 54. Accenture's Data Conversion Methodology will be tailored to meet Mason's requirements.

Additional Deliverables Expected as part of the Conversion and Migration process:

- Detailed ETL design for each Conversion Data Object (portions of data being moved from legacy to new platform.)
- Pre-Load and Post-Load reports, used to compare what we planned to load vs. what was loaded.

Additional Deliverables Expected as part of the Integration process:

- High Level Data Flow Diagrams for each integration showing the source, any expected transformations or data quality concerns, data security concerns/impacts, and target systems. Also defining schedules and orchestration mechanisms to confirm data is moved, logged, and error controlled and reported as expected.
- User Interface Specification(s)
- Interface Design Documents
- Unit Test Scripts
- System Integration Test Scripts



Implementation (6.8)

System implementation is an effort that coordinates the deployment of software into production, training of users, and readies a support mechanism to address any challenges. The Contractor must demonstrate an awareness of the relationships impacted by this change. Mason expects each implementation effort to be a positive experience that ensures users achieve a high level of knowledge, and competence with Mason. As such, all Contractor staff shall engage in positive and professional interactions with each user group, focused on customer service.

In our experience, the most successful systems implementation programs are where we have the highest degree of collaboration with our client and any other vendors on the program. Our approach includes four key components to build and maintain collaboration:

Section addresses requirements outlined in Service Needs Section 6.8 Implementation paragraphs 1-5



One Team, One Goal Approach: We will work collaboratively with Mason and the other implementation partners to co-create well defined goals so every team member understands what they need to do and how success will be measured.

Inclusive Governance Model: We propose a collaborative governance model designed to foster a One Team approach where all parties in the ecosystem have a seat at the table.

What Gets Measured Gets Done: We will collaborate with Mason to establish a capable and efficient Program Management Office to measure and report key project metrics on scope, budget, progress, issues, and risks. Our programs are built around high-touch governance models that create an environment for collaboration and positive synergies. In other words, we will do this project 'with' you, not 'to' you.

Be Ready for Change: As part of governance in the second bullet and the stakeholder work described in the Program Organizational Change Management section (9.7), we want to create close connections with the Change Control Board to help re-prioritize when needed. As outlined in our references in the Qualifications and Experience Section 3.b, we have implemented Salesforce solutions at the University of Arizona, Rutgers University, and Georgia Institute of Technology, to name a few of our many Salesforce engagements within higher education.

Implementation Team

The Contractor is expected to plan and execute all aspects of pilots and implementations utilizing an Implementation Team comprised of Contractor and Mason staff. While the Contractor shall have ultimate responsibility, Mason desires a collaborative approach to the effort. The Contractor shall work closely with Mason and the PMO team to ensure communications, training, and on-site support activities are appropriate and in keeping with the tone and vision of the Mason Project. The Contractor shall assess the preparations for the implementations and work towards a seamless transition with all users.

Mason wants a Vendor that they can depend on to plan and execute all aspects of pilots and implementations collaboratively with their team. Our proposal combines deep Higher Education and Salesforce expertise with best-in-class CRM tools. Throughout the engagement we bring the ability to reach into our over 25,000 skilled Salesforce professionals as well as higher education and learning experts. Our team will work closely with Mason to communicate, train, and provide on-site support activities to promote the goals and vision of the Mason project, described further in Figure 55.





Responsibility		Meets
Communication		
Training		
On-Site Support		
Implementation Preparation		

Figure 55. We will meet Mason’s goals as described in Section 6.8 paragraph 1, bullet 1.

Pilot

Mason desires a pilot implementation for each Implementation Phase based on the agreed upon project schedule. Mason defines a pilot as a contained assessment, beginning after the training of pilot users, used to validate the systems usability and support processes. The pilots shall be administered by the Contractor. The final selection of pilot users shall be determined by Mason.

Once we have created the foundation of the tool during the 12-weeks of CRP workshops, we will be able to design quickly to build solutions for each release. Upon completion of user acceptance testing, a small group of users will participate in a non-production Pilot for each release to validate the system usability and verify it can support business processes. During the Design phase we will playback the approach to get more precise as we further refine the Student Lifecycle Transformation and write test scripts at the same time.

Organizational Readiness

Before implementation commences, the PMO vendor shall perform an Organizational Readiness (OR) assessment reviewing the Contractor’s Conversion Plan, OCM Plan, Implementation Plan and Training and On-site Support Plan. Mason’s executive management team shall utilize the OR Assessment, any Mason PMO and Mason OR recommendations, and Contractor input to make decisions for both pilot and implementation go/no-go decisions. If Mason chooses to designate an Organizational Readiness (OR) Team to provide guidance and feedback to the Contractor in regard to implementation, the Contractor shall also work closely with the OR Team during implementation.

At its core, Implementation is about getting people and organizations ready for the new changes. To support readiness for the Student Lifecycle Transformation project we will engage leadership, develop a change network, and measure progress along the change journey. For full details of the Organizational Change

Management approach please refer to Organizational Change Management and Training (Section 7.0) below.

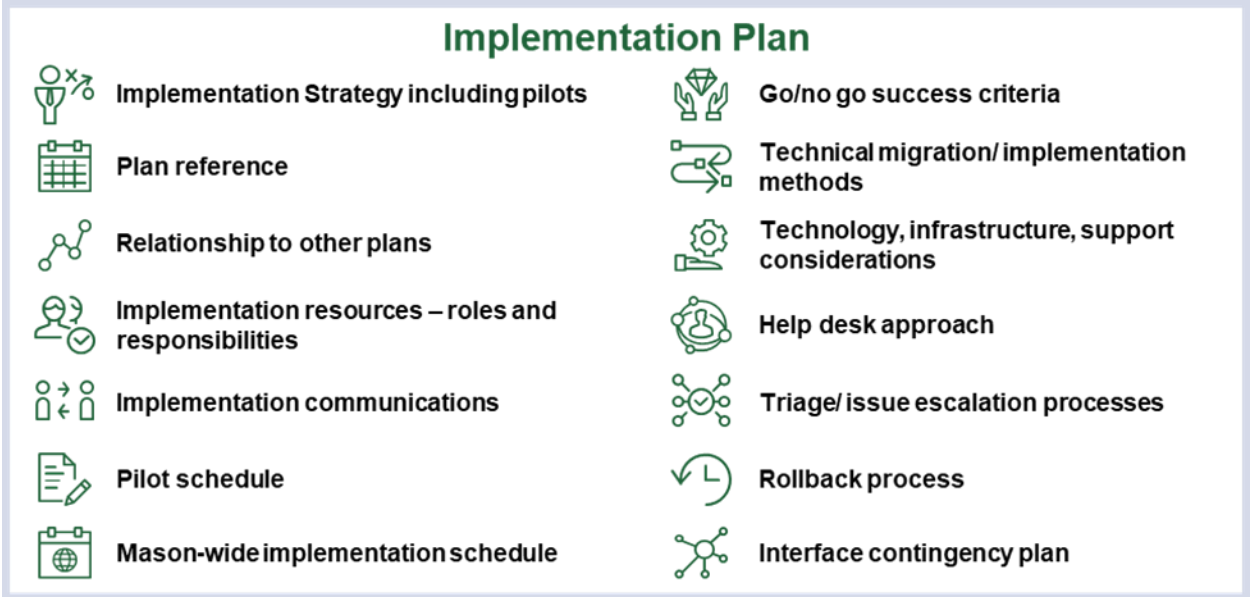
The Readiness Checklists will be used throughout the program but will be most critical beginning two months prior to each go-live. Readiness Meetings typically begin 6-8 weeks prior to go-live, with a weekly or bi-weekly cadence. These meetings bring all relevant stakeholders to the table to share individual workstream updates on readiness using the Readiness Checklist. The purpose of the Readiness Meetings is to discuss obstacles and gauge the program's ability to Go Live. Insights and outcomes from these meetings inform a final "Go/No Go" meeting and vote with Mason's leadership.

Prior to implementation we will complete an assessment reviewing the Conversion, OCM, Implementation, Training, and On-site Support Plans. We will present the assessment along with recommendations from Mason's PMO and OR to Mason's executive management team to help determine the Go/No Go decisions.

Implementation Plans

The Contractor shall develop an Implementation Plan for each implementation. The Implementation Plans shall be based on best practices, experience with implementation projects, knowledge of the Mason technology, and user and stakeholder need. Each Implementation Plan shall include, but is not limited to, the following items:

As described in Section 6.8 Service Needs section, page 48 paragraph 5. We will develop an Implementation Plan to accommodate each implementation that is based on best practices, experience with implementation projects, knowledge of Mason's technology, and user and stakeholder needs, as reflected in Figure 56.



GMU STL 23.0012E

Figure 56. The purpose of the Implementation and Deployment Plan is to detail the implementation and deployment methodology.






Pre-Implementation Activities

The following key activities, as applicable to the functionality being implemented, must be completed and approved prior to initiating each Implementation Phase:

System Testing/User Acceptance Testing executed (all defects with severity of blocker, critical and high must be fixed)

- Blocker: An item or action that prevents further testing and no work around is possible, is considered a blocking defect.
- Critical: A major functional piece is broken, or issue that affects several areas is considered a critical defect.
- High: A defect that does not function as expected/designed or causes other functionalities to fail to meet the requirements is considered a high defect.
- Mock Conversions (100% successful/zero defects or agreement to address defects either later in implementation or in following implementation)
- Rollback process fully tested
- Disaster Recovery drill executed
- Help Desk support in place
- Training of Implementation Team and affected users executed

Prior to implementation, but after approval to Go-Live, we will present to Mason a deployment checklist that is aligned to Section 6.8, paragraph 3. We will complete and present these plans for each implementation phase, as described in Figure 57.

Responsibilities		Meets
System Testing/User Acceptance Testing executed (all defects with severity of blocker, critical and high must be fixed)		
Mock Conversions (100% successful/zero defects or agreement to address defects either later in implementation or in following implementation)		
Rollback process fully tested		
Disaster Recovery drill executed		
Help Desk support in place		


Responsibilities		Meets
Training of Implementation Team and affected users executed		

Figure 57. We will meet Mason’s goals as described in Section 6.8 paragraph 3.

Implementation Reporting

The Contractor shall monitor and report the following objectives at a minimum in the Weekly Status Report, as appropriate for each project phase:

- Usability among different stakeholders
- Effectiveness of training
- Unanticipated legacy/document data conditions
- Data conversion
- Post conversion synchronization process
- Planned schedule for implementation
- Organizational readiness
- Stakeholder communication messages
- Technical readiness of implementation location
- Software quality
- No security incidents
- Service disruption and/or system downtime
- Successful interfacing
- Issue escalation process
- Help desk/triage procedures
- User account management
- Participant feedback

Accomplishing these goals successfully helps reduce potential risks and issues prior to Mason wide implementation. The Implementation Team shall measure the above key objectives and report them to the Mason PMO for review.

During Implementation we will monitor and report the objectives addressed in Section 6.8, paragraph 2 in the Weekly Status Report for each project phase, reflected in Figure 58.

Project Dashboard

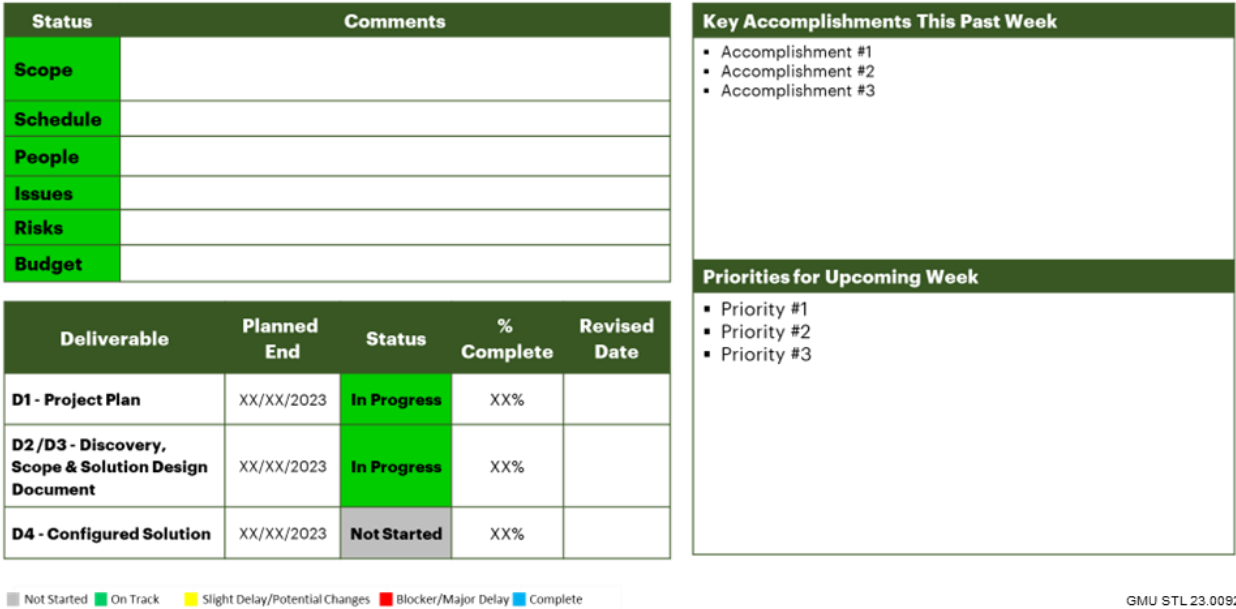


Figure 58. The report will provide the appropriate points that are applicable for each phase.

Implementation Activities

The Contractor shall be responsible for the following tasks, at a minimum:

Our implementation approach includes a comprehensive set of coordinated activities based on active collaboration among Accenture and the George Mason team. Figure 59 describes the Implementation activities that we are responsible for, as described in Section 6.8, paragraph 5.

Responsibilities		Meets
Build into the Project Schedule an appropriate amount of time after the pilot concludes and before Mason-wide implementation for adjustments/corrections to software, plans, training, etc.		
Inform Mason of any technical preparation needed for Mason implementation (which may include networking, hardware, or software needs) with adequate advance notice		
Develop all necessary SOPs and Checklists (e.g., Solution Monitoring, and Source Code Migration)		
Conduct a walkthrough of pilot/Mason-wide implementation activities with the Implementation Team		









		Meets
Conduct a walk-through of pilot/Mason-wide activities that shall occur and review any Standard Operating Procedures (SOP), checklists, etc. that shall be utilized		
Execute the approved activities in the Implementation Plans		
Address system issues during pilot and Mason wide implementation following the published Governance Manual triage process. This process includes any system, training, or support issues that arise through all communication channels back to the project. All members of the Implementation Team are to be trained on the triage process.		
After the pilot implementation, review with the Implementation Team the success of the pilot objectives, lessons learned, user readiness, and operational readiness and determine whether to move forward with Mason-wide implementation.		
Deliver a Formal System Acceptance Report		
Hold weekly implementation status meetings with Mason that review the weekly reports and address, at a minimum: Pilot/Mason wide implementation status Software defects Communications/OR Team activity integration Training/on-site support process Help desk process Solution monitoring/performance		
Provide Mason with frequent status updates		
Provide system support and address any corrective actions needed throughout each implementation. This shall occur through a frequent triage process facilitated by the Mason PMO that shall track, prioritize, and address the issues found during implementation. The Contractor shall also ensure all applicable Mason environments and artifacts are kept current and in sync throughout implementation.		

Figure 59. We will complete the Implementation activities.

Deliverables

Submit all deliverables required to complete the Release 1 and Release 2 Implementation milestones. Additionally, at the conclusion of Implementation for each Phase, the Contractor must submit an updated version of all Discovery and Design deliverables denoted with an asterisk (*) next to it in the table in Section xx.




We will develop and keep updated the necessary requirements and design artifacts to successfully develop and implement the Mason system for Release 1 and Release 2 Implementation milestones. We understand, as addressed in Service Needs section 6.8, page 49 paragraph 2 bullet 13, that at the conclusion of Implementation for each Phase we will submit an updated version of all Discovery and Design deliverables denoted with an asterisk (*) next to them in the table in Section 6.2.

Organizational Change Management and Training (7.0)

Change management focuses on empowering Mason stakeholders with the right information at the right time to ultimately adopt the new system and adapt their ways of working. Mason is embarking on a change journey to move to a one-org strategy with students at its center. Moving to a one-org strategy requires colleges, academic units, and business units to align on new ways of working that can feel disruptive and challenging. We understand that this journey can be challenging. Thus, change management is at the center of our implementation approach.

Section addresses requirements outlined in Service Needs Section 7 Organizational Change Management paragraphs 1-16

Figure 60 shows our understanding of the challenges navigating change in higher education, and ways that Accenture has successfully mitigated risks and driven program success.

 Higher Education complexities...	 Resulting in a number of risks...	 Requiring specific mitigations
<ul style="list-style-type: none">• Decentralized/Consensus decision making• Volume and diversity of stakeholders• Varying sizes and goals across campuses, schools, departments• System landscape complexity• Diversity of types of units and funding sources	<ul style="list-style-type: none">• Volume of consultation required• Speed of decision making and potential churn• Stakeholder engagement and consensus• Multi-institution coordination and communication• Resistance to change• Exceptions driving priorities	<ul style="list-style-type: none">• Solid methodology to drive stakeholder involvement• Effective program governance• New and multi-modal campus communication• Agile readiness and alignment strategies• Application of lessons learned

GMU STL 23.0084

Figure 60. We consider the impact of the change to Mason and its stakeholders, and we know that this implementation is one part of a broader journey.

We create a student-centered approach that focuses on meeting students where they are and supporting them in their journey. Mason’s leadership, staff, students, and stakeholders have unique needs and perspectives that need understanding and addressing in the plan; some factors to consider include the needs of decentralized colleges and units, multiple organization cultures, and diverse student pathways and mixed modalities of education delivery.

We propose dedicated change management, communication, and training workstreams to deliver comprehensive OCM support. Our Organizational

Our Change Management resources will partner with key Mason counterparts and participate in Conference Room Pilots (CRPs) to develop recommendations for the following areas shown in Figure 61.

Figure 61. In our experience, Change Management Capabilities are as important as technical ones.

Organizational Change Management Requirement (7.1)

While implementing and deploying Salesforce is a large-scale technical implementation effort, the change to a one-org strategy with students at the center is a major organizational change management (OCM) effort. At the center of this program is the development of a comprehensive and holistic OCM strategy that includes change management, marketing and communications, and training. The contractor shall assist Mason in the establishment of an Organizational Change Management (OCM) program to support the Student Lifecycle Transformation and complement the Salesforce implementation.



Organizational Change Management

The nature of change is evolving and, while technology is necessary, it is an insufficient factor on its own to drive effective transformation today. The modern change journey needs to be personalized to fit the unique needs of each stakeholder groups across Mason in order to drive effective change and mindset shifts.. We will bring assets, resources, past experiences as well as artifacts, templates, and existing resources in each area.

Our first step will be to develop a change strategy specific to George Mason and the Student Lifecycle Transformation program (to be branded later; additional details in Stakeholder Visioning and Touch Point Engagement Section 7.2). While the components of change management are standard, the way they apply to each organization and project are unique – it is important for Mason to get a partner who understands not only the textbook definitions of change management and general deliverables, but one who truly partners to co-create a tailored approach that will meet the needs of Mason stakeholders and help move them along their change journey toward success.

Accenture aligns our overall approach to PROSCI's change methodology. A key component of the PROSCI methodology includes the five outcomes that people need to achieve for successful adoption of change: **Awareness, Desire, Knowledge, Ability, and Reinforcement (ADKAR)**. The **ADKAR** framework provides a simple way to understand—and plan for—change at the individual level. ADKAR directs Change

Management efforts with the goal of providing the **right support** to the **right people** through the **right channels** at the **right time** ensuring a reasonable pace of change for users and a smoother adoption experience. For Mason, we specifically apply techniques, tactics, and lessons learned relevant to Mason’s proposed transformation including ways to address challenges and risk mitigation strategies.

Figure 62 outlines how Accenture implements ADKAR, integrates the idea of outcome plus performance as a success driver, and the role played by understanding, acceptance, and commitment.

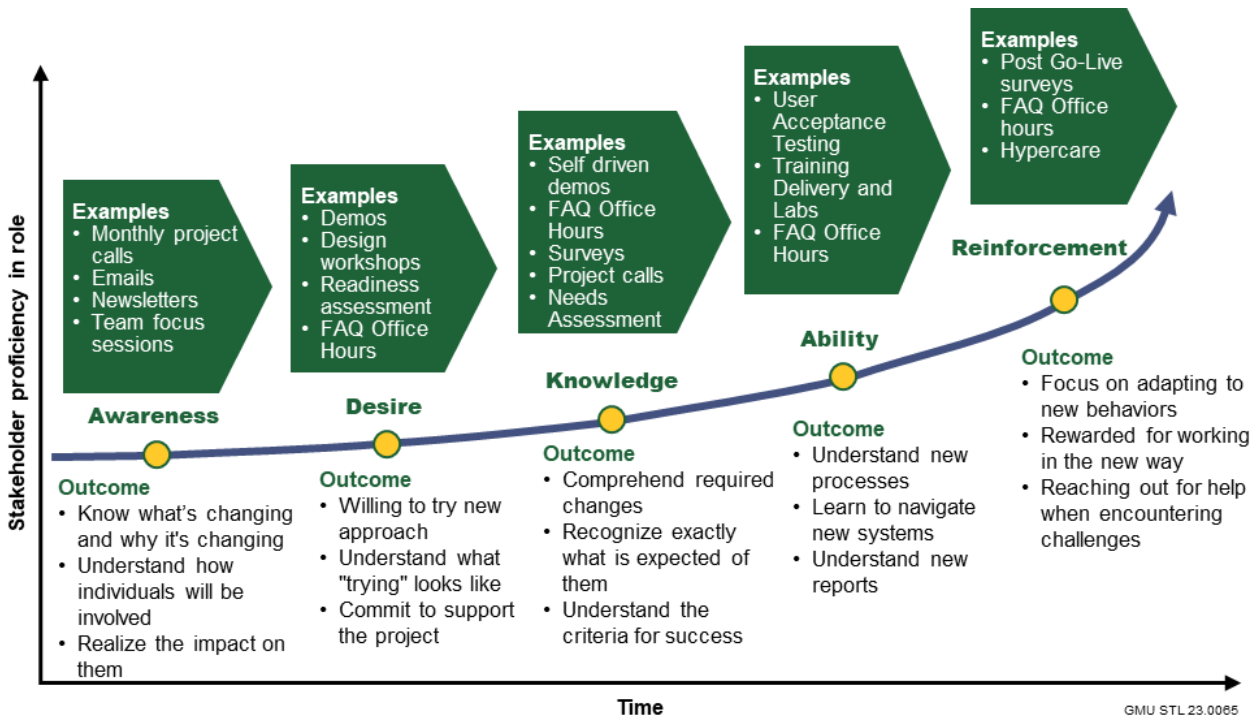


Figure 62. ADKAR framework provides a simple way to understand and plan for change.

Our OCM Team

The contractor shall provide expertise and assist Mason’s executives, management, staff, and organization in the successful business and cultural transition from the current state of two orgs to the planned future state of one-org.

Accenture's OCM team brings broad and deep experience from other public multi-campus implementations of similar size and complexity. Combining Mason’s and Accenture’s experiences allows us to truly tackle this change in a way that resonates with and addresses the unique needs of those who are impacted. Our change lead, training lead, and communications and marketing lead all have robust experience not only in their disciplines, but in applying them in the context of transformations within higher education.

While the technical transition is complex, the most critical component of success is the business and cultural transition of the people. Standardizing ways of working across a decentralized institution poses challenges. Yet standardization is also an opportunity to gain an enhanced view of the prospect and student journey, from initial interest and engagement through completion of an advanced degree (and every step in between). To the right is a case study of another higher education system that we helped move from two TargetX orgs to a one-org strategy.



We completed a health check for a public university system with seven schools, each with their own implementation of Salesforce and TargetX. We recommended the schools re-implement Salesforce and move to a one-org model. Through a combination of effective stakeholder engagement and readiness assessments, we were able to identify two schools that were ready for this change and implemented a new one-org structure that the other schools implemented over time.

With our distinctive set of services and deeply skilled change professionals, we focus on change strategy and enabling change - resulting in the adoption of new behaviors and mindsets by individuals and teams. Accenture consistently stays on the cutting edge of change management methodologies and frequently provides thought leadership. We are committed to bringing to Mason the best of what we have learned over our 30+ year history across higher education and other industries.

Organizational Readiness Assessment (7.2)

There are a number of sub-cultures and sets of working dynamics that will inform how team members and the Mason community respond to significant organizational change. Some members of the Mason community have worked for Mason for a number of years and offer invaluable institutional knowledge, while other members are newer to the university and offer varied experiences. The goal for the assessment should be to identify minor practical issues or deeply held emotional reactions moving from two-orgs (undergraduate and graduate) to one org. It should also examine the changes moving from two-orgs to one org will have on the undergraduate and graduate student populations. To understand the specific impacts the targeted changes will likely have, the contractor will conduct change readiness assessment. The insights gained from the assessment and feedback will help inform the organizational change management strategy and help to plan and manage for future change activities. Further, the assessment will help with sequencing and prioritization for the organizational change management process and discover points of integration with the technical implementation team.

The first step in assessing organizational readiness is to identify and analyze the stakeholders. As part of this exercise, we utilize institutional knowledge on the audiences likely to be impacted, along with our perspective on what we have seen with other clients on other implementations. As audiences are identified and defined, early analysis is completed, with key information such as:

- From where they get information
- Primary drivers and motivations (e.g., balance student needs with the large volume of students that need support)
- Potential risks and challenges during the implementation

The second step is to understand what is changing. As part of understanding what is changing, we will work to identify how things are done today, the proposed way they will be done in the future, and how changes will impact different stakeholder groups across people, process, technology, and culture. At an individual level, we can get a sense of someone's readiness for change based on interactions and conversations we have with them. When you take a step back from the individual and look at the many individuals that make up a specific group or unit, how can we get a sense of that group's readiness for change? Via Accenture's data driven Change Readiness Assessment activities, we will take a holistic look at each group by capturing

business data, facilitating leadership interviews, and gathering changes and reactions during high-level plan and design sessions to assess readiness across stakeholders (internal, external, student, and graduate student) across people, process, and technology.

What is a Change Readiness Assessment?

Change Impacts are people-related implications of a process or technology-related change, or actions required to accomplish the change, from a people/job/organization perspective. The **Change Readiness Assessment (CRA)** documents the impacts, specific jobs and teams impacted, level of impact, and perceived reaction. We also document potential actions to be taken to mitigate changes, such as marketing and communications, training, and stakeholder engagement, as reflected in Figure 63. The outputs of this assessment provide key inputs into future change activities, such as developing the detailed training plan and curriculum, detailed marketing and communications plan, and stakeholder engagement plan.

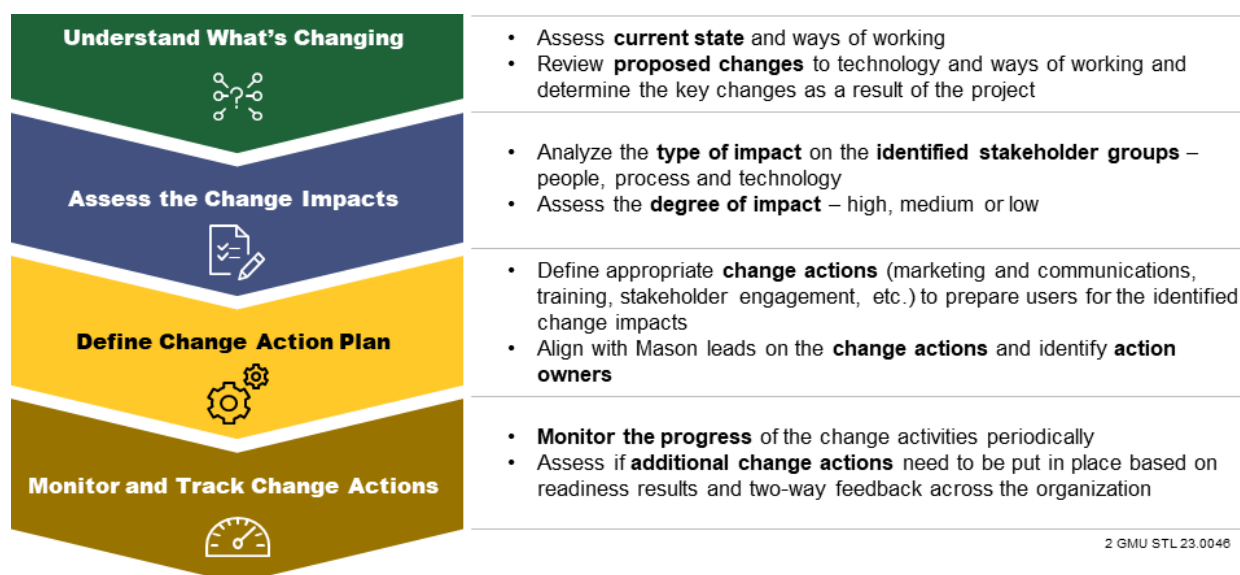


Figure 63. Change Readiness Assessment (CRA) identifies how changes affect target audiences as they transition from current to target state.

As part of the change readiness assessment, we also identify anticipated stakeholder reaction. We gauge this from a combination of hearing discussions during design sessions, interviews, and project team and stakeholder feedback, positive and negative. Some emotions are minor, while others may be deeply held. In our experience, reactions are rarely universal and may vary by group and across the organization. Some examples we have experienced from other large-scale transformations are below:

- A process improvement may bring positive reactions from centralized student success functions, but a negative reaction from colleges of the advising and coaching function who may operate differently
- Disagreements may exist about the definition of key concepts that are used differently between the graduate and undergraduate school when defining the future state; the compromise may leave both with positive and negative reactions, but on different topics (e.g., how to define a student's address and email)
- Processes executed in the best interest of the student may create a real and/or perceived greater volume of effort from the advising function

Figure 64 describes how might we perform a Change Readiness Assessment (CRA) for Mason.

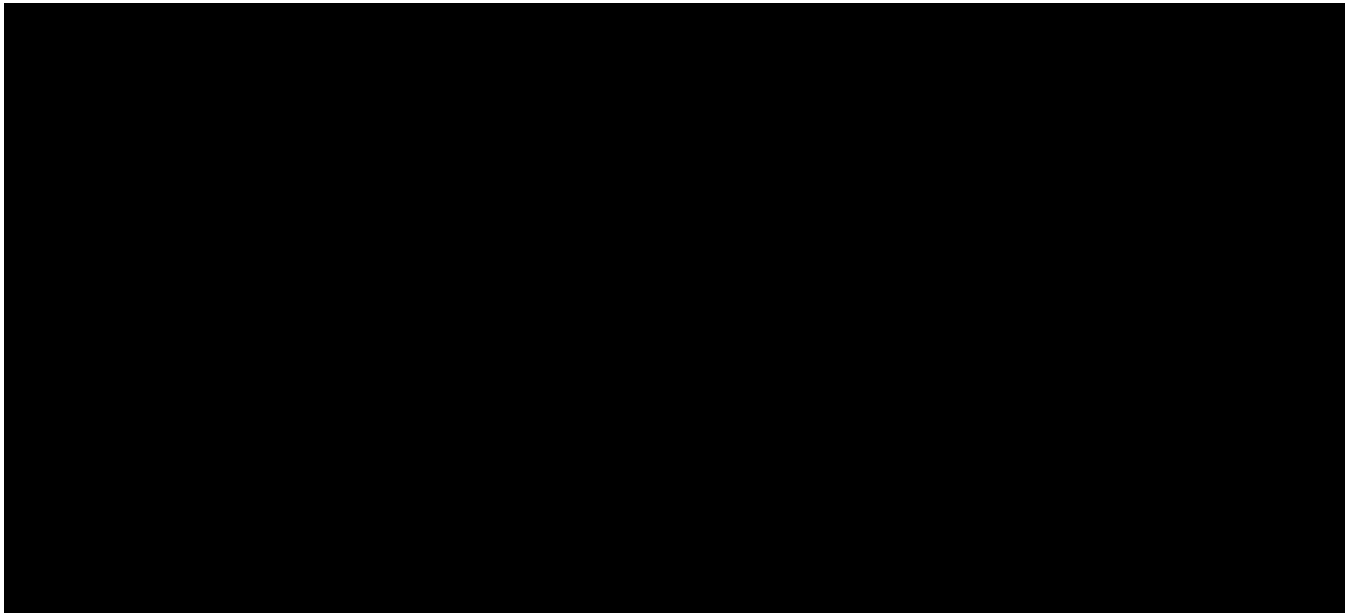


Figure 64. A change readiness assessment evaluates an organization’s ability to adapt to new practices or systems and identifies potential obstacles that may arise during the change process

The first step is gathering the changes. These will be tracked in a change impact tracker, reflected in Figure 65; we will partner with Mason to determine the best vehicle for tracking (e.g., Jira, Excel).

	Field	Description
Change	Overview of the proposed change	An overview of the proposed change and difference between current and future state
	Current State	How the task/report/process/business area operates today
	Proposed Future State	The proposed way it will operate in the future
	Business Process / Functional Area	The area this change is aligned to
	People/Process/ Technology	Columns to be flagged if the change is related to people, process, or technology; more than one column can be selected.
Impact	Impacted Audiences	A list of impacted audiences, driven from the stakeholder’s assessment
	Level of Impact	A score is given to identify the volume of impact (low/medium/high)
	Anticipated Stakeholder Reaction	Positive, Negative, Mixed, or Neutral reactions are listed for selection.
Potential Actions	Recommended Actions	Columns to flag if different types of actions are suggested based on early analysis, such as Marketing, Communications, Stakeholder Engagement, and/or Training

Figure 65. Change trackers allow you to see exactly what changes were made and by whom.

Degree of Impact

An impact score is determined based on the above inputs to help identify the level of impact by audience for change management planning and prioritization.

Key CRA Activities for Mason:

- **Educate and agree** on CRA objective, approach and methodology, templates (criteria and measurements) and outcomes with Mason's stakeholders and implementation/technology partners to set the right expectations, avoid conflicts later and smoothen the implementation process.
- **Identify key stakeholders and Stakeholder Groups** and engage to understand current and future business processes through workshops/interviews – know how **BIG** the change is.
- **Collect and capture change impacts** by putting yourself 'in the shoes' of your change audience to deep dive into the detailed impact of change (process, systems, roles, culture etc.) on users.
- **Review and validate impacts** from the functional experts and incorporate the feedback to further refine the impact analysis.
- **Summarize impacts and action planning** by defining the user experience change summary and 'moments of change' and building the action plan for each impact including training, communications, and other change interventions.
- **Refine stakeholder analysis and change plan** as per the outputs from Change Readiness Assessment, potential areas of friction and feedback from leadership to make the change strategy more pertinent and relevant.

Some of the anticipated outcomes from this would be as follows:

- Detailed List of Change Impacts captured in the tracker.
- Summary of What's Changing by Audience and Impact for Sponsors, Leadership, Business Function leads, students, etc. This will also summarize a 'Day in a Life' of key impacts arising out of the Salesforce implementation for key stakeholder groups.
- Summary of Change Actions Required to begin planning for the detailed marketing and communications plan and training plans.
 - Outcomes from CRA will act as an input to the development of **detailed plans**, such as the training plan, marketing and communications plan, and others to address the wholistic changes expected across Mason
- **Prioritized view of actions** based on an initial view of the most impacted audience; this view will also enable the Organizational Change Management team to have collaborative conversations with the rest of the project team, including the technical implementation team, to identify other project engagement opportunities driven by other teams that can be utilized as a change management input (e.g., User Acceptance Testing, and business system demonstrations after sprints).

The change readiness assessment summary presentation, referenced above, will enable the project team to begin to socialize the impact of what stakeholder groups should expect from the project, and where we need their support in socializing and championing the change.

While this will enable us to understand what's changing and begin planning for actions, additional inputs are needed to understand what other change actions and readiness activities are needed to prepare the Mason community for what to expect. As part of this process, it is important to assess and measure change readiness across stakeholder groups. The knowledge of what is changing, along with the knowledge of where users are in their readiness journey, will empower targeted action planning that increases overall readiness and eventual go-live success.

Measuring Readiness and Adoption

A readiness approach serves as the foundation to address key areas: How will leaders drive the change? How will the team engage and empower stakeholders? How to manage the project to maximize impact? It's not enough to diagnose problems – higher education institutions need a clear path forward to resolve problems.

Change measurement is an iterative process based on ongoing feedback received to help us anticipate and respond to issues throughout implementation process and create solutions for new challenges that arise. The aim of measurement is to understand where impacted audiences fall along the ADKAR curve and the effectiveness of change and training mitigation actions. To assess overall readiness, the Organizational Change Management workstream will use two tactics:

We analyze the effectiveness of change to help us understand:



- The current level of awareness and understanding of the program
- Current program perception
- Where additional change management efforts may be needed across stakeholder groups and/or colleges and academic and business units



Tracking People readiness, through three readiness surveys throughout the duration of the implementation



Tracking Business readiness through Readiness meetings and Readiness Checklists.

People Readiness

In order to assess where people are on their change journey, we will look to gather feedback from change champions on overall program sentiments, and also conduct three total readiness surveys of the stakeholder populations across both the Student Success and Admissions and Enrollment go-lives. Readiness assessments help the change team to identify any challenges and gaps in change management plans, as well as unearth additional insights at a stakeholder group level.

Surveys - In our experience, when the results are anonymous it helps unearth emotions and reactions that are sometimes held back when asked to share feedback verbally. We bring standard, ready to deploy surveys used on other deployments. While these are not benchmarked, they will bring valuable quantitative data that will be used to identify college and unit and/or stakeholder group specific change needs.

Depending on the phase of the program, we ask questions aligned with the ADKAR curve that help identify where stakeholders are, and where additional change actions are needed. For example, on a similar program, we were able to identify that while individuals in the College of Engineering had heard of the program, they were not aware of the goals and objectives, and did not agree that the program would achieve the objectives (tied in tandem to lack of awareness of the goals). We were able to partner with change champions from the College of Engineering to create targeted action plans to align both leadership and key stakeholders around the goals of the program and what they could expect. The next survey round, these scores improved notably. Readiness surveys help unearth potential challenges people readiness and adoption challenges in advance of go-live to increase success.



**Organizational
Change
Management**

Accenture will bring our ready to execute surveys to Mason to be tailored to any Mason specific needs. We will look to Mason to help us execute and deploy the surveys based on decisions made as part of the change strategy when defining the change readiness approach specific to Mason and our partnership.

In addition to our standard change readiness surveys, we also have a robust change analytics platform, called Transformation GPS, that benchmarks results against thousands uses predictive analytics to create targeted actions plans and prioritize the actions that will achieve the greatest results. We are including this as an optional service for Mason.

Business Readiness - Business readiness tracks college, school, campus, and academic and business unit readiness. This looks primarily at if the applicable areas have completed key readiness tasks, including:

- Change management and communications related tasks, such as identifying users to receive surveys and executing communications.
- Other project related tasks needed for go-live, such as system security assignments, which are often requested from units to populate and share back with the project team.

Stakeholder Visioning and Touch Point Engagement (7.3)

Visioning is essential to any organizational change. The process of working with Mason's stakeholders to identify a shared vision for the future is key to driving large-scale change. The contractor will conduct stakeholder visioning sessions to help develop a shared vision and objectives and identify change champions to further the goal and vision of a one org / connected student lifecycle strategy.

As outlined in the Discovery approach, we will hold an initial Visioning workshop that engages institutional stakeholders to frame a digital-first and student-centered vision for what George Mason wants to become through this transformation. Establishing a unified vision not only guarantees the end solution will be purposeful but also creates champions of change that can sell the narrative of the vision to the rest of the organization.

The initial Visioning workshop will be a key input to developing the right vision and will also help align the right program name and branding, driven and aligned with the overarching vision and goals, and also help us identify the right structure for a group of change champions for the program. While those involved may be asked to champion the change, before launching a formal network of change champions, we will complete an audience analysis and a change strategy that will define the process for identifying and recruiting change champions, who are collectively referred to as a Change Network. We will engage the Change Network no less than monthly, once established, to share project updates, and as applicable, toolkits to help change champions continue to share project messaging with the Mason community.

After the initial Visioning workshop, we will hold monthly workshops with the identified change champions to continue garnering excitement, provide updates on the progress of the project, and provide them with the knowledge they need to spread the vision across the organization.

The contractor will continue touch point engagement with change champions post-visioning to ensure the vision and objectives remain relevant and change champions are armed with information to share with their stakeholders (business units, academic units, students, and alike).

Our philosophy for OCM is to help you prepare and coach your organization through the change and increase the capability so you can realize the value of your investment as quickly as possible. We see people as the differentiating factor in any institution and will partner with you to identify the right journey for your people.

We understand the variety of needs of impacted stakeholders throughout a higher education institution. Each group will be considered in a thoughtful way to make their personal change journey as painless as possible. We will help confirm that stakeholders at every level are engaged and involved, so to not feel as if something is being "done to them".

We will utilize Super Users and 'Change Champions' who are the employees nominated for being a part of the broader Change Network. Change Networks are stakeholders—typically high performing end users—identified by unit leadership to attend dedicated sessions and receive tailored materials to support the program at a “grassroots” level. These individuals are a community of representatives who facilitate change within their business units and report on progress and monitor / mitigate issues.

They are the points of contact for their respective college, school, or unit to help with overall change. This includes tasks such as:

- Answering questions about the program timeline or functionality
- Sharing information and cascading marketing and communications materials within their unit
- Listening to feedback and concerns of college, school, and academic and business unit-based stakeholders and sharing feedback (positive, negative, and neutral) back with the project team
- Become early super-users (relevant to their future state role in the system) to help support others locally at and after go-live.

We will develop materials to share no less than monthly with the Change Network, and support Mason in convening the Change Network as a large group, in smaller groups, and 1:1 as applicable. We will also use tools such as Microsoft Teams to provide tools to communicate, collaborate, and share resources and facilitate a cross-unit forum of the Change Champions to share ideas with each other. A well-managed Change Network is extremely important in a large-scale transformation, reflected in figure 66.

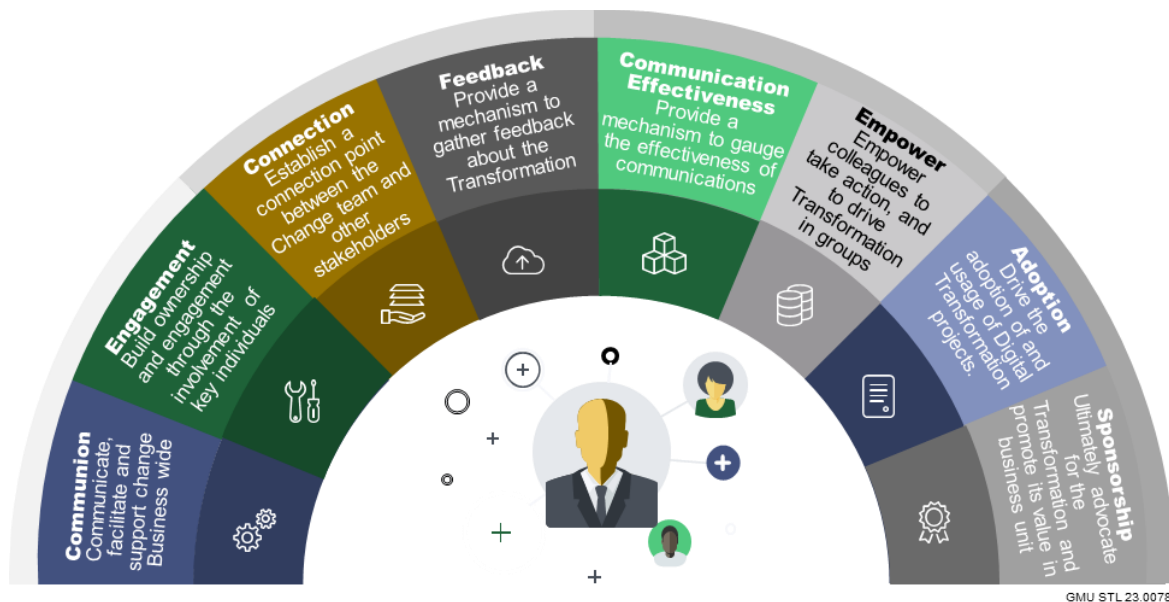


Figure 66. Change Network will provide a platform to generate awareness, provide communication to and work directly with impacted audiences.

Below are typically stakeholders involved in the change network. While a large portion of planning is focused on empowering change champions, all levels below are important for success. We will work to use the below as a baseline and will co-create the right structure and size for the Change Network with Mason, including how the change network may shift and evolve between Release 1 and Release 2 deployments.

- **Executive Sponsors and Leadership** - Executive Sponsors lead out the transformation projects and change initiatives. Ultimately responsible for the success of the projects/initiatives.

- **Organizational Change Management Team** - The OCM team own the change management strategy and execution, and develop materials to help share information to positively influence the project direction, influence people across the company and business units including leadership.
- **Change Champions** - Champions drive the change amongst their colleagues by cascading information between the project teams and their respective business units.

Figure 67 shows a common structure for our Change Network. We will tailor the below structure specific to Mason as part of the Change Strategy.

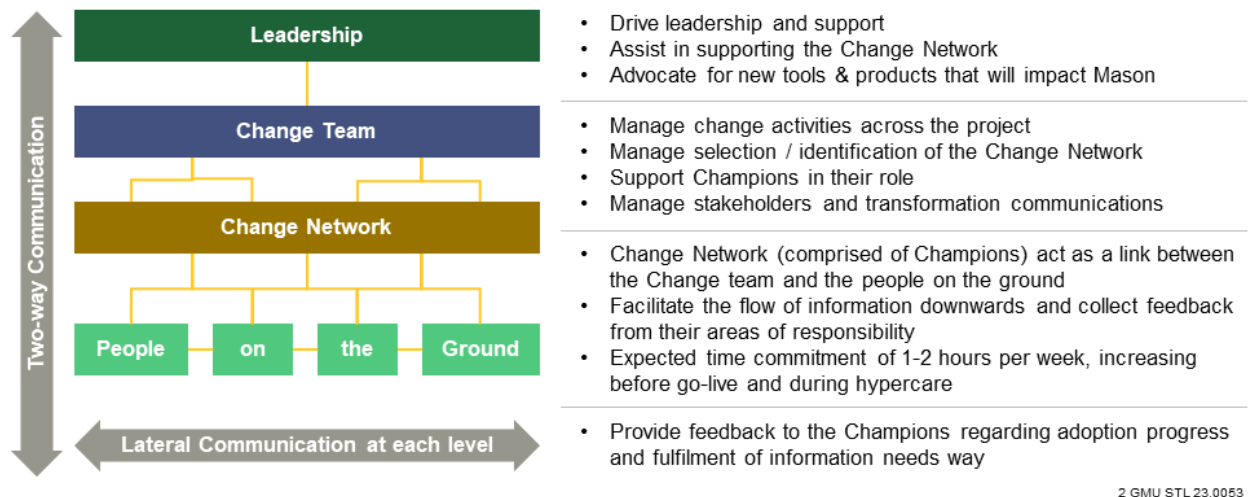


Figure 67. The Change Network is designed to increase adoption through training interventions with colleagues using demos, challenges, spotlights or similar activities.

The purpose of this group is to facilitate the flow of communications across the organization. Guiding principles will provide the overarching direction for the Champion's activities that will happen under the OCM workstream. Change Network activities will include several mediums that are engaging and appealing to the Champions. These include OCM led activities, community seminars, and self-learning to validate Champions are able to meet the vision and objectives of the project.

Stakeholder Identification and Sponsorship Assessment (7.4)

The key to any successful change management effort requires change leaders throughout the organization to articulate the benefits of the change. Therefore, the contractor will work closely with the Mason team to identify change champions and change agents willing to sponsor and support organizational change. The contractor will conduct an assessment to determine the level of current-state support for the pending changes (or lack of support), as well as each prospective change champions and change agents' current level of sponsorship competency. The outputs of this assessment will inform the change management strategy and overall plan, specifically the support and coaching individual stakeholders will need in order to be fully effective in their role as change leaders. (resistance management plan).

Sponsors are key leaders across the university that are critical in driving change from the top down. Accenture's research shows that Change Leadership is the single most important driver of successful change. In many cases we find that senior leaders are in alignment, but this alignment has not cascaded to other leaders throughout the organization which creates issues and challenges at the team level. Figure 68 summarizes how Accenture recommends engaging and aligning leadership and executive sponsors in support of the Student Lifecycle Transformation project.

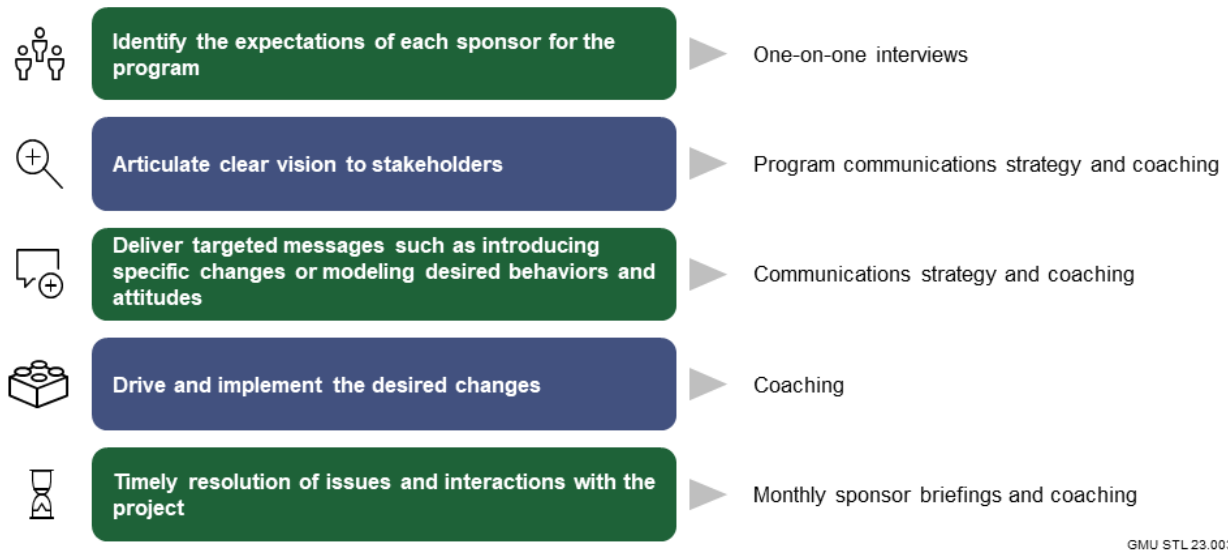
Program Leadership Alignment

Figure 68. We use demonstrated tools and techniques to facilitate their active participation of the project among project stakeholders.

To effectively sponsor the change, champions and sponsors will need to both demonstrate their ability to speak positively about the program and its expected outcomes, as well as have the skills required to communicate and support the leaders, peers, and others they are asked to sponsor the change to.

To do this, the change team will develop a set of activities that can be used during meetings (during governance meetings, the change network kickoff, and other meetings as applicable) that help the team understand both the current sentiments about the program, and current level of knowledge and skill in change management. Collectively, this will give the change team a baseline of the level of sponsorship competency that will be used to tailor messaging and content used with the change champions and sponsors throughout the program and will give them both gain appropriate skill and move throughout the change curve (and empower them to them to lead others through the change curve) as part of their role.

Resistance Management

Typically, we like to manage resistance by engaging those end users early to help design, configure and test for the solution. Often this turns detractors into champions, building a stronger coalition of support for the future state. The strongest resisters can become our strongest advocates. They are often equally vocal in their support as they were in their resistance. We are able to spot resistance early by following the Ask, Listen and Watch method:

- **Ask:** end users how they are feeling about the change – proactively seek their feedback,
- **Listen:** to what end users are saying about the change, pay attention to the grapevine!
- **Watch:** for changes in behavior like lack of engagement or enthusiasm, moodiness, absenteeism.

This framework helps us identify who is change resistance, and more importantly, what the points of resistance are. Different emotions indicate different underlying issues. Accenture's research-based methodology has defined key emotions commonly experienced as part of a significant change, five of which are often associated with resistance, and what the change team and leaders can do to support stakeholders demonstrating these emotions. These include immobilization, denial, anger, bargaining, depression,

testing, acceptance, experimentation, and mastering/advocating. Figure 69 below shows an example of how to identify denial, how to react to denial, and how to support people to help move them to acceptance.

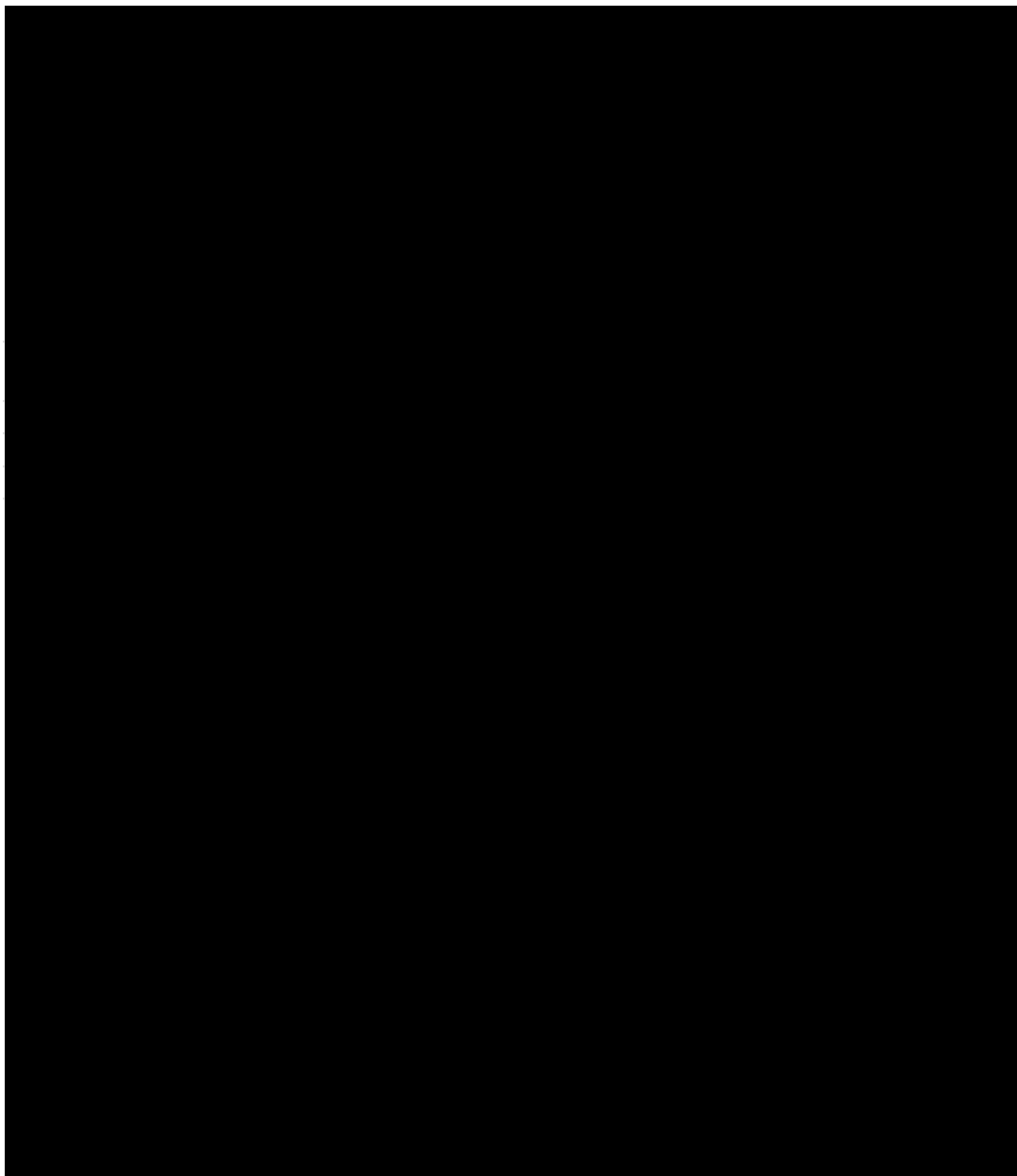


Figure 69. For the most common behaviors identified, the change team will incorporate that into toolkits that are deployed to the Change Network.

The goal is to move people through the change curve through the “resistant” emotions through to those with positive association. While it can be easy to only focus on the resistance, it is equally important to support those demonstrating behaviors such as acceptance, experimenting, and masting/advocating, as they often become vocal and key influencers for those who may be experiencing other emotions.

It is important not to categorize individuals as “resistors” or “resistant;” instead, we should recognize emotions and behaviors, seek to understand the reasons for them, and react in a corresponding manner that helps support the user. There can be positive emotions as people progress through the change curve

as well; support should be provided to encourage the positive behaviors as well as those experiencing challenges.

Change Management Plan (7.5)

The key to any successful change management effort requires change leaders throughout the organization to articulate the benefits of the change. Therefore, the contractor will work closely with the Mason team to identify change champions and change agents willing to sponsor and support organizational change.

As referenced above, we will partner with Mason to develop a Change Network made of Change Champions who will be tasked with sponsoring and supporting organizational change, as depicted in Figure 70. We will develop role descriptions for change champions; a common role description is below. We will tailor this to the specific needs of Mason as part of the Change Strategy.

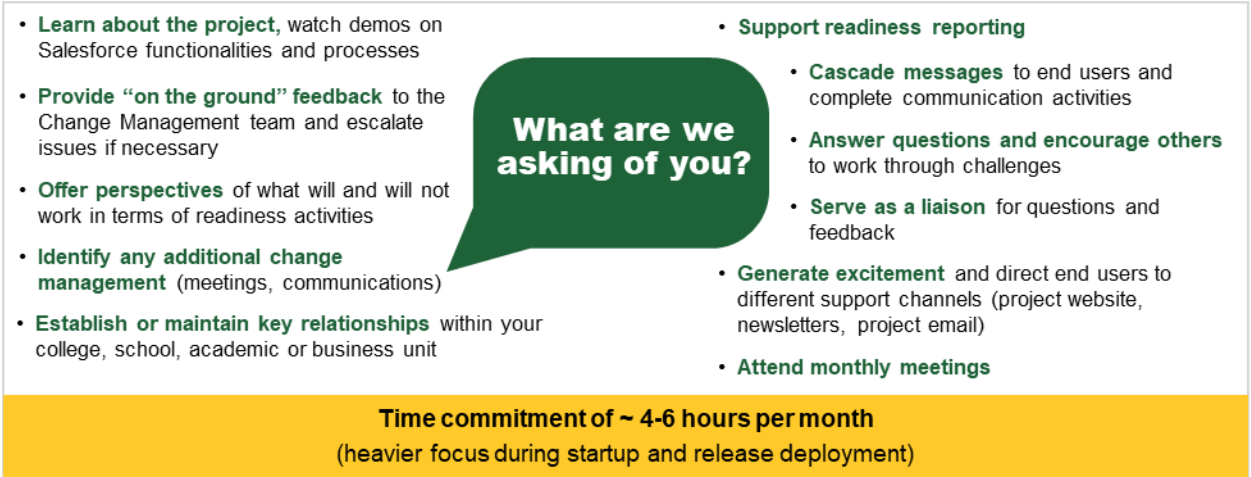


Figure 70. We will work closely with the Mason team to identify change champions and change agents willing to sponsor and support organizational change.

An approach we have used in higher education that has been successful in the past is to share the role description with the senior leader over each college/school/academic unit/business unit in scope and impacted by the change, with an ask for them to appoint a Change Champion. This creates accountability for readiness with the senior leader, and empowers each area to find the right person, as there is not one right answer or standard role within the organization that best fits the Change Champion criteria.

One of the most important roles is the Executive Sponsors who must be able to influence the department and divisions and can make decisions regarding the direction, impact, and resources impacted by the Student Lifecycle Transformation project. We propose that Mason collaborate with Accenture to conduct one-on-one interviews with each sponsor as part of project kickoff and mobilization. These interviews will cover the sponsor’s specific expectations, goals, concerns, and how they would prefer to be involved throughout the project lifecycle.

The contractor will conduct an assessment to determine the level of current-state support for the pending changes (or lack of support), as well as each prospective change champions and change agents’ current level of sponsorship competency. The outputs of this assessment will inform the change management strategy and overall plan, specifically the support and coaching individual stakeholders will need in order to be fully effective in their role as change leaders. (resistance management plan).

We will develop a Change Management Plan that aligns to the topics listed Section 7.5 Service Needs section page 41 paragraphs 1-4, reflected in Figure 71. As referenced above, sponsorship competency is

a combination of current level of support for the program and current skills in change management to be able to effectively sponsor the program. We will develop activities that can be run in existing meetings to assess the current sponsorship competency across both elements.

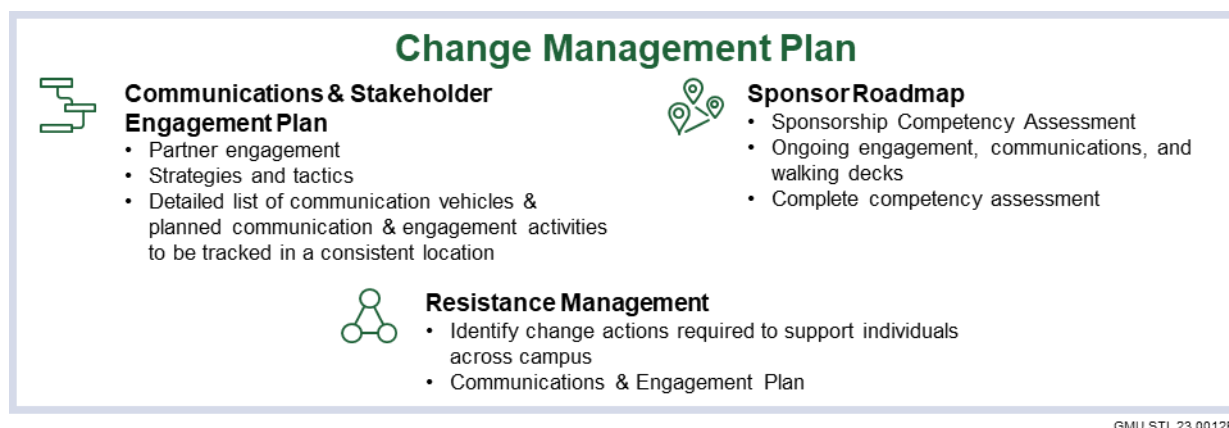


Figure 71. Change Management includes the communications and stakeholder engagement plan, Sponsor Roadmap and Competency Assessment, Marketing Plan, Training Plan, and Resistance Management Approach.

Marketing and Communications (7.6)

A common understanding of the Student Lifecycle Transformation effort and the program is key to the successful adoption of Salesforce, new business processes, and the merging of our existing orgs. The contractor will work with Mason to cultivate a common language and communications strategy that represents the values and philosophy of Mason, while also easily articulating the Student Lifecycle Transformation effort. This common language and strategy should be documented in a marketing plan executed through a campaign.

A tailored marketing and communications strategy will be required to secure engagement and buy-in for the Student Lifecycle Transformation effort. Accenture will work with Mason to translate the values and overarching philosophy of Mason to the marketing and communications strategy, key messaging, and associated project branding guidelines. The following will address our approach and methodology, as shown in Figure 72 for marketing and communications need to cite section 7.6, page 51 paragraphs 1-8.

The major systems transformation that Mason is embarking on presents opportunities: generate interest and engagement.



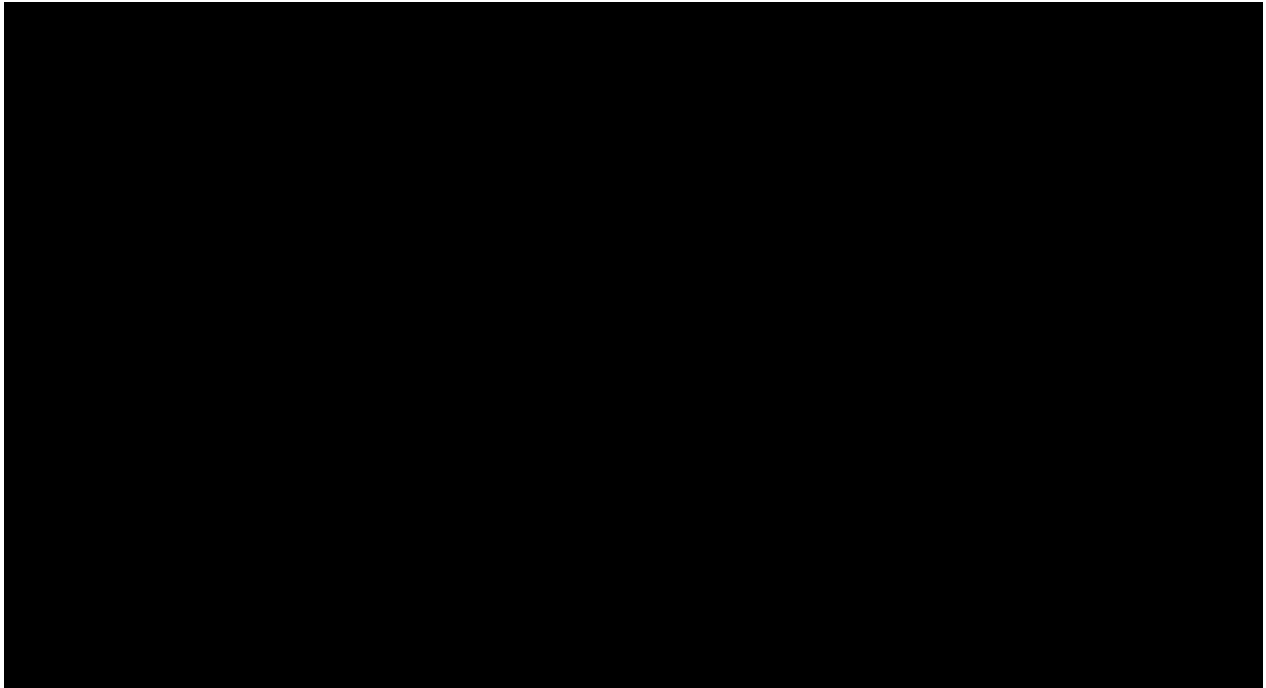


Figure 72. The strategy will define the overarching approach for how we communicate with each audience.

We identify existing communication and marketing vehicles, identify potential audience gaps, and develop guiding communication and marketing principles that will serve as the foundation for all program marketing and communication. Before developing key messaging, it will be important to determine the project name, goals, tagline, and objectives. Figure 73 reflects a visual of the types of marketing and communication vehicles we often use at each phase of the change curve, reflected in.

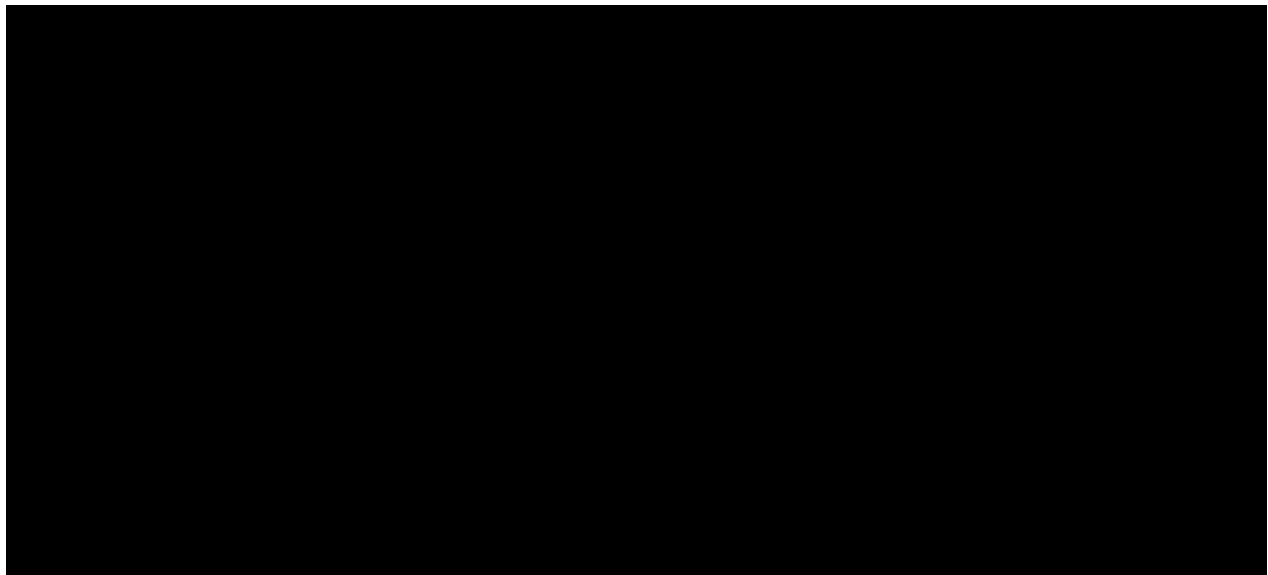


Figure 73. All marketing and communication efforts are aligned with the ADKAR model.

Initiative/Project Name & Strategy

Initiative/Project Name & Strategy: The contractor will work with Mason to name the Student Lifecycle Transformation Program. The contractor will develop strategic language and key messages. As part of this process the contractor will develop an internal document to clarify the initiative's promise and key messages.

When supporting Mason with devising a name for the project, we will start with understanding the stakeholders' needs, opinions, and experiences with student advising, recruitment, and admissions, grounded in the overall program vision defined in the Visioning Workshop. From this research, Mason will receive a proposed list of names. We will share these, along with taglines, with project sponsors for initial feedback and prioritization. The program name will be pilot tested in a focus group, as detailed below, to validate that the name, tagline, and key talking points resonate with not only project leaders and governance, but with the impacted Mason community at large. It is important that the name be concise, aligned with the values, and resonates with the Mason community at large. Once a project name and tagline has been determined, we will partner with Mason to develop:

- Strategic language, and key messages that are human-centric, future-proof, easy to remember, and resonate with audiences.
- An internal document that acts as the "one source of truth" to clarify the project's goals, promise, and key messages.
- Strategic language about the Transformation to be used initial communications broadly. Some messages may be developed for specific audiences, but the majority of audience-specific talking points will be developed later in the program once there is a greater understanding about what is changing.

Marketing Plan

Marketing Plan: The contractor will develop a marketing plan that identifies and segments audiences, articulates the marketing strategy for each audience (including a general audience), identifies marketing goals, and ties together campaigns and activities. The marketing plan should include clear dates to show when campaigns, events, and program activities will be delivered, a comprehensive list of communications channels to connect with and engage stakeholders, and high-level work streams that identifies roles and responsibilities for communications under a shared governance model.

With the increased costs of higher education and pandemic-accelerated student questions about the quality-vs.-value of student services, counselors and students expect highly personalized experiences. To validate that Mason meets that expectation in equipping the stakeholder with the right information about how the transformation will provide personalized experiences we will create a marketing plan.

The marketing plan will outline when campaigns, events, and program activities will be delivered, a comprehensive list of communications channels to connect with and engage stakeholders, and high-level work streams that identifies roles and responsibilities for communications under a shared governance model. Figure 74 describes the steps we follow to develop an effective plan.

1. **Conduct research, including audience segmentation and a market segmentation analysis.**
 - a. Audience Segmentation / Market Segmentation Analysis
 - i. Identify internal and external stakeholders. Internal stakeholders include academic advisors, admissions counselors / recruiters, and students. External stakeholders could be community and corporate partners who serve as key stakeholders as part of the student experience
 - ii. Understand stakeholder's experiences and attitudes towards the systems they use, including their complaints, by collecting relevant qualitative and quantitative data.
 - iii. Develop user personas and journeys for each of these stakeholders that make clear the stakeholders' experience and how to move the stakeholder from one point of engagement with the transformation effort to another.
 - b. Analyze Mason's competition and their student information system offerings.
 - i. Investigate Mason's competitors and the quality of their deliveries of student advising and recruitment and admissions with respect to their student information systems or technology landscape.
 - ii. Identify market gaps, and consider which gaps Mason can close and pursue as an opportunity, including to help set itself apart.
 - c. Select audiences to strategically prioritize.
 - d. Draft initial set of key messages intended for each prioritized audience.
2. **Devise several options on marketing strategy for each prioritized audience (including the general audience).**
 - a. **Vision:** Define the vision of the transformation. Then, define the marketing goals, or how marketing and communications should be used to achieve the vision of the transformation.
 - b. **Governance Structure:** Following a shared governance model, delineate roles and responsibilities between Mason and Accenture in the execution of marketing and communications by high-level workstreams. Identify key personnel, assigning communication responsibilities, and then define policies, processes (activating processes, escalating specific concerns, and making decisions), roles and responsibilities for enterprise communications and functional counterparts. Establish a governance charter outlining the executive sponsor who provides strategic direction and resolves major issues, an activation team that oversees the completion of marketing activities.
 - c. **Feedback Channels:** Set up resources and activities dedicated to soliciting feedback on marketing strategy, campaigns, and materials. Enlist focus groups representing stakeholder groups, and create surveys for distribution after focus group sessions and via other channels to gather feedback on how to improve marketing materials.
 - d. **Marketing Campaign:** Define marketing campaigns for each audience segment. Select a corresponding set of engagement activities that fits the preferences of each audience segment, and tailor the engagement activities to each audience segment.
 - e. **Marketing Material:** Draft marketing materials. Solicit feedback on marketing materials from stakeholder representatives via focus groups and surveys, and select final launch-ready marketing materials for distribution.
 - f. **Marketing and Communication Channels:** Compose a comprehensive list of appropriate communication channels for each stakeholder group. Take into account how much of Mason's existing in-house marketing capabilities can be leveraged to distribute communications and other marketing materials and how much must be outsourced to Accenture.
 - i. Channels include: website, social media, video-hosting websites, e-mail, text messages, etc.
 - g. **Monitoring Channels:** Dedicate staff and resources to monitoring conversations around the transformation – before and during the launch – and document concerns or viewpoints to address through marketing materials. Choose means of testing or measuring the effectiveness of deployed marketing materials across these channels, and make adjustments where necessary.

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Figure 74. Key inputs into the Marketing and Communications Plan will be identified as part of the change readiness assessment when identifying change impacts.

In our experience, defining the roles and responsibilities for the marketing plan is critical, particularly in a decentralized, shared governance model. We will work with Mason to outline:

- Who will draft each detailed communications and set of marketing collateral
- Event logistics owners, content owners, and presenters (who are often different, in our experience)
- The right reviewers are (by audience and vehicle, as defined in the marketing plan)
- What elements of the plan needs a focus group and/or survey to validate and approve content and it is not needed (e.g., it is follow-up content aligned with what we have already gotten feedback on and confirmed)
- The ownership, by line item, of marketing and communication vehicle distribution (e.g., University marketing may include something in a newsletter that is drafted by the project change team)

Marketing Campaign

Marketing Campaign: The contractor shall create and run a marketing campaign that generates public awareness of the Student Lifecycle Transformation. The campaign should include website development and maintenance, marketing collateral (key narratives, executive talking points, slide decks, infographics), newsletters, and videos, all segmented by audience.

We will create a marketing and communications campaign for each audience segment and select a corresponding set of engagement activities that fits their needs and preferences, including tailored engagement activities. The campaign will include website development and maintenance, marketing collateral (key narratives, executive talking points, slide decks, infographics), newsletters, and videos. To create the campaign, we will:

- Review goals of the campaign with Mason
- Identify the audience segments and create a vision for each segment for all marketing and communications activities
- Develop the marketing and communications materials, which we will review with Mason and request approval
- Develop a set of criteria to measure performance, including surveys from focus groups, and clicks on Mason's public-facing and internally facing website (details on the website are provided in the section on 'Website' below)
- Launch the marketing campaign. We will monitor incoming results and feedback and adjust the marketing plan, and campaign as needed for improved outcomes

Before the launch of major campaign milestones, we will want to pause to confirm the content intended in the campaign meets the needs of the target audience. As such, we will conduct focus groups and conduct surveys to get feedback and audience insight.

Focus Group

Focus Groups: The contractor will conduct focus groups with Mason executives, managers, end users, and student representatives to test marketing materials; e.g., slide decks, narratives, and talking points. The contractor will generate focus group results and recommendations and present them to the Salesforce Executive Committee for decision.

Accenture recognizes that the small-scale, intimate nature of focus groups help to garner detailed and unique insights that are not always easily obtainable or expressed via surveys. Accenture and Mason will enlist focus groups to collect insights from stakeholder representatives to inform the content of marketing. The vision defined as part of the up-front visioning phase will drive all materials developed for the program. This vision, in addition to aligning key stakeholders around the program, will anchor the marketing effort

around a single vision that all aspects of the project are seeking to support and will drive alignment, storytelling, and prioritization. This will drive all downstream messaging, tailored to the interests and needs of each audience in the Transformation. We will conduct five focus groups throughout the program duration, on average run quarterly.

Topic Selection: As part of developing the Marketing Plan, Accenture will identify critical juncture points to garner feedback, e.g. before the launch of a student marketing campaign. We will develop draft materials, aligned with elements of the marketing campaign, that we seek to gain feedback on specific to each audience.

Participant Recruitment and Selection: Accenture recognizes that some groups and individuals from Mason's organization are more likely to be recruited to due to a position or influence they hold within the organization. Because focus groups are designed to garner unique insights, Accenture will seek to democratize the opportunity or invitation to participate by advertising the opportunity across various channels. Not only does this yield a diversity of Mason voices in the discussion but also confirms that mainstream or dominant opinions and voices are not the only ones represented in the discussion. Selection criteria could include random selection, nomination, or leveraging the Change Network to identify users who meet pre-set criteria. We will define the process as part of the Change Strategy.

Focus Group Content:

During the focus group, the goal will be to share drafts of early materials and messaging and gauge for feedback. This could include:

- Demos of the in-development website or other interactive materials
- Run-throughs of presentations
- Feedback on program talking points
- Live system demonstrations with callouts relevant to a specific stakeholder group, asking for feedback on the relevance of the messaging and what parts they would care most about.

At the end of the focus group, Accenture will distribute surveys and / or exit questions to gather feedback. Accenture will compile the results and insights gathered from the focus group, incorporate any key feedback heard, and present recommendations to the Salesforce Executive Committee for decision. It is important to note that not all communication and marketing materials will be presented; rather, we will focus on key milestones and communication points when we will launch either key net new messaging (e.g., the transition from general program language with benefits to the specifics of what's changing and what to expect) and/or to a new audience (e.g., the launch of a student marketing campaign). Once approval is gained, all materials will anchor to the key messages and goals agreed to by the Salesforce Executive Committee.

Surveys

Surveys: To complement the focus group efforts, the contractor will use surveys to periodically test marketing materials.

To expand the channels offer for gathering feedback beyond focus groups, Accenture will distribute surveys to periodically test marketing materials for how effective they are. Accenture identifies that at least 2 broad categories of survey types are required: surveys distributed at the end of focus group sessions and surveys distributed in an ad-hoc manner. For each of these surveys, Accenture will develop a set of specific questions to validate that our quantitative and qualitative data collection reflects objective feedback and can be used to get feedback on targeted marketing and communications materials. Accenture possesses survey assets enhanced by engagements with previous clients, such as Qualtrics, Microsoft Forms, and

Mentimeter, an online survey tool. These surveys can be housed in strategic locations, such as within the marketing materials themselves, to help make providing feedback convenient and easy to complete. The survey results will be used to make edits to materials so that they better align with the “what’s in-it-for-me” of each audience segment.

Marketing Materials

Marketing Materials: The contractor will develop a comprehensive set of marketing materials such as a “roadshow” slide deck to explain why we are making this change and socialize upcoming shifts due to the one-org strategy; infographics to simply explain what Salesforce is; timelines; important milestones; Mason-branded templates; and a video that describes the program and its benefits. All marketing materials will need to be 508-compliant.

Accenture agrees to develop a comprehensive set of marketing materials that help to explain the purpose of the transformation using Mason-branded materials and following 508 compliance rules. The materials include:

- Infographics that visually communicate key program information, such as what to expect, program benefits, what Salesforce is and why it’s being implemented/changed to the one-org strategy, and others. To develop infographics, we bring a myriad of tools.
- Roadshow and walking decks that communicate the project overview, timeline, and expectations; they will be given to program sponsors and refreshed on an ongoing basis to confirm the latest and greatest program messaging and updates are available at key stakeholder fingertips
- A video, or set of videos by audience, that effectively communicate what the program is, and expected benefits that can be deployed through the marketing campaign, easily viewed on the website, and can be shared as users have questions about the project.

We will utilize our “next generation” (NextGen) communication tactics and tools to develop tailored communication messages for different stakeholders. This includes interactive videos through Touchcast, infographics through Piktochart, and videos using PowToon. With increased reliance on a wide range of mobile devices overall and for remote work, these tactics help cut through the noise to engage people from the start and keep them engaged and aware to build greater understanding and acceptance across the change journey. Note these are sample tools; it will be important to identify the right tools to use at Mason. While Accenture brings best practices and industry leading NextGen tools, Mason will need to be able to maintain some of the collateral post-implementation in ongoing operations. We will use Mason’s existing tooling and licensing to allow for an easy transition from project to ongoing operations to empower Mason to own project related assets in ongoing operations.

The OCM team will work with the other workstream teams to validate a program-specific communications plan and to articulate the program activities and benefits to be communicated to stakeholders. We use existing communication methods and forums and only create new channels where necessary and sustainable, reflected in Figure 75.



Figure 75. We use next generation tools to deliver tailored messaging to stakeholder to promote awareness, understanding, and interest.

We will regularly test and evaluate the material to determine if it is generating the right engagement results and will work with Mason to identify any additional needs and assets to help meet the need, as mentioned earlier in the Focus Groups section. This could also include events and roadshows where Mason shares a prototype of the in-development one-org system for users to test and provide feedback on, aligning with our iterative development process, sharing visuals early and getting user feedback to improve and adapt.

Accenture will work with Mason to consider augmenting existing channels for greater reach and we will work with Mason to determine what is right for their stakeholder groups. We identify mechanisms to track the effectiveness of engagement and communication, such as pulse surveys and click analysis, so that we understand how effectively the messages are reaching the intended audiences. Ongoing communications can range from low to high tech and might include email, stand up meetings at the supervisor level, signage through Mason workspaces, social media, and podcasts. For the project, across both phases, we will develop up to 207 marketing and communications assets with effort evenly spread across the project duration, outside of up-front strategy development and initial website and program material build. These are spread across efforts for basic talking points, executive walking decks, change champion toolkits, videos, roadshow events (and content for them), and others (to be confirmed as part of the marketing strategy and marketing plan).

Website

Website: The contractor will work with Mason Communications Manager(s) to develop a public facing website that creates public awareness, articulates the program's progress, provides avenues for engagement and feedback, hosts upcoming and past events, and houses documents and marketing materials for public consumption. The contractor will determine what portion of the site should be available to the general public versus the internal Mason community and develop a set of written SOPs that document website users and update/maintenance processes.

Change will only succeed with the support of Mason's stakeholders. To gain their support, we need compelling messages that instill the need and desire for change by focusing on the "why", "what's in it for me", and "what does 'good' look like". We will empower stakeholders by keeping them informed and making them a part of the process by creating a public-facing website that acts as a one-stop source of information embodying the principles and goals outlined in Figure 76.

The website provides information on program activity, progress, avenues for engagement and providing feedback, events, and knowledge. Because the website will be used by various audiences with varying levels of interest, technical knowledge, and buy-in on the program. To provide the right type of information, Accenture will consider various factors when determining with Mason what kind of information should be featured on the website, such as basic vs. advanced, non-technical vs. technical, internal vs. external audience, etc.

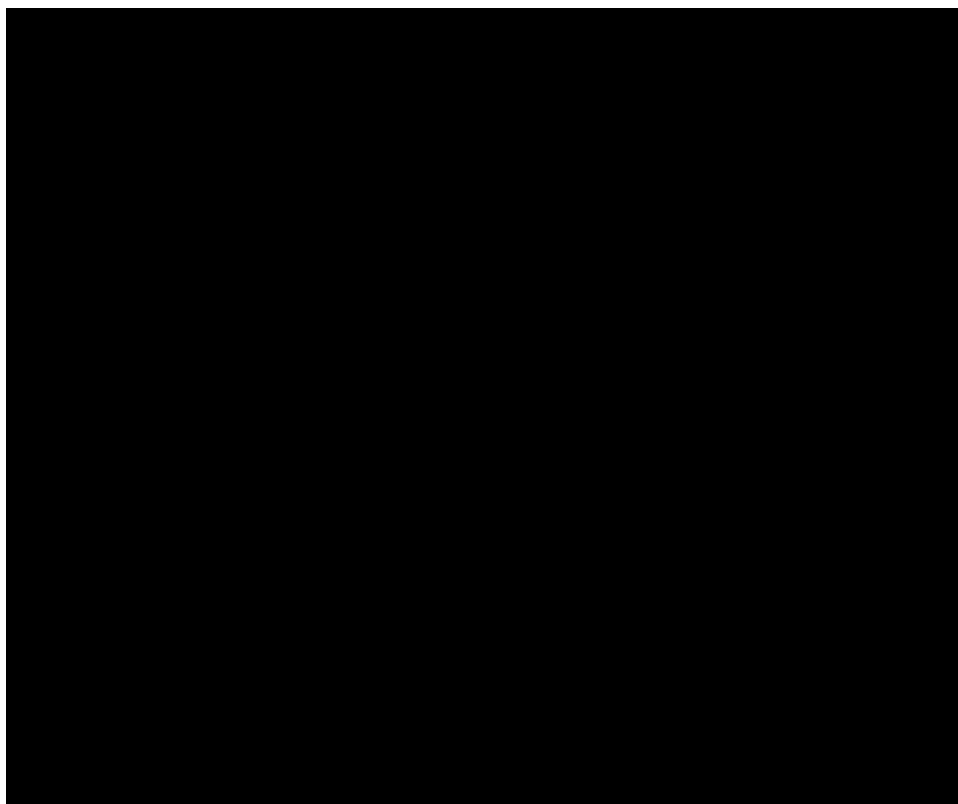


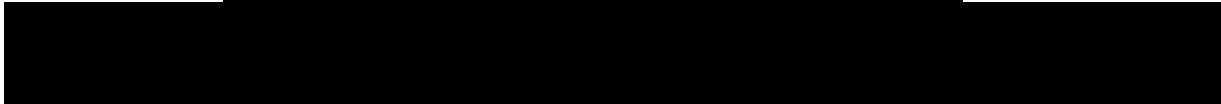
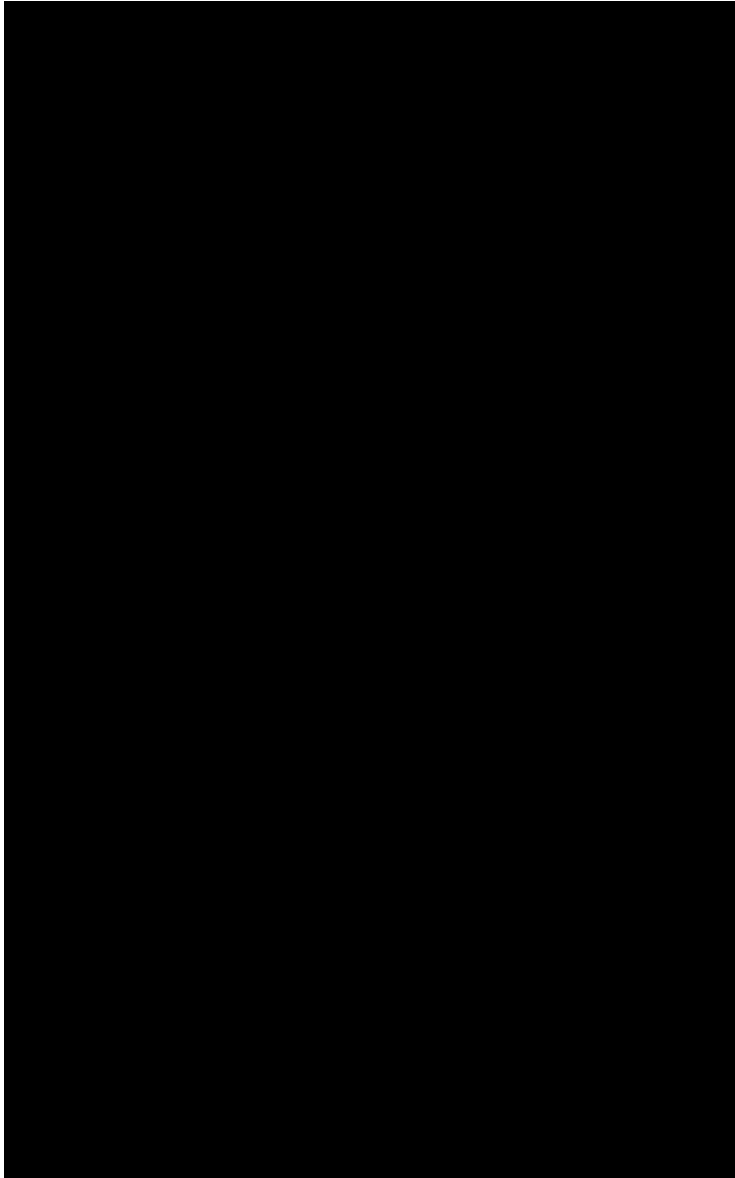
Figure 76. Accenture will work with Mason to build a website about the transformation project embodying the principles listed above, such as transparency and end-user engagement.

We will start by meeting with the Mason's Communications Manager to understand the various boundaries, including technical, security, and business constraints, when choosing what kind of information it should display on the website publicly, behind a firewall, and what may need to strategically exist separately (e.g., some details about admissions may contain highly sensitive and proprietary Mason intellectual property that those outside the admissions team cannot have access to). We will document this information, along with the roles and responsibilities associated with the maintenance process into a policy and procedure document.

In designing the website, we will follow best practices to create a user-centric and end user-friendly website so that engaging with and participating in the transformation and its planning is as smooth a process as possible for Mason's stakeholders and various audiences, including:

- Displaying information by the audience type / group (general information for everyone's consumption vs. tailored information for a specific audience)
- Creating different landing pages, documents, marketing materials so that stakeholders get the information they need, which includes:
 - identifying the opportunities to engage with and provide feedback on the transformation program, supporting these with announcements, interactive event calendars, registry forms, and survey links
 - sharing project planning and progress updates, including key business owners, technical enhancements planned
 - trainings and job aids on how to operate Salesforce for various stakeholders' needs
 - project e-mail box where people can submit questions and get support

- data from user questions that will help Accenture and Mason to address communication gaps; update FAQs available on the website; and identify resource/s to monitor and route questions to correct individuals



We will work with you to develop a Website that is aligned with the vision of the program, rooted in the key messaging defined early in the Marketing & Communications Strategy, with content aligned with the audience segments confirmed in the Marketing & Communications Strategy and initially identified as part of the Stakeholder Identification efforts. We are familiar with WICAG guidelines and will develop a website that meets 508 accessibility requirements. We will document the guidelines and standard operating procedures for making site updates, approval processes and any website guiding principles during the implementation to be ready to handoff to Mason to maintain and adapt for ongoing operations once live. We have helped multiple clients shift the use of their website and are open to partnering and providing guidance to what we have seen work well with other clients as part of the knowledge transfer and handoff post go-live.

Training (7.7)

The Mason training effort is a vital piece to the successful implementation and acceptance of the new system and tools.

Grounding back to the ADKAR methodology, training at its core is what builds the ability in both the system and new ways of working, and is a critical component of overall go-live readiness and success. We have robust experience developing and deploying training for large, complex Higher Education implementations and know the nuances that need to be accounted for; we can help you identify issues before they arise and resolve them because we've seen it and we've done it.

Our training team will work closely with Mason to build a training program that will help all Faculty, Staff and Students adopt and embrace new skills, competencies, and behaviors that are required for a seamless experience. Consistent with our change approach, we will co-create a customized and targeted training plan that meets the needs of all Mason stakeholders. Our training philosophy is grounded by these principles:



Holistic – training materials will encompass the big picture of the transformation, while also focusing in on the critical-path to set up end-users for success on Day 1 of go-live, navigating them from today to tomorrow.



Point of Need – accessible at the time a user needs it (i.e., convenient, on-demand), in the flow of school/work/life.



Persona / Role-based – content tailored to meet the needs of unique target audiences, defined by key audience segments.



Empowered mindset – content will incorporate new behaviors to encourage your people to feel empowered by this change and new ways of working.



Sustainability – creating sustainable materials that can be easily maintained in the long-term.



Continuous Improvement – feedback is continuously gathered from each release, with changes reflected in the training approach to validate ongoing improvement

Our training approach starts with collaborative strategy, and then cycles through the following activities:

Training Approach

In the initial stage is we will evaluate the training needs, impacted groups, timeline, and resourcing plan. Leveraging the change readiness assessment, we will conduct a training needs analysis to determine the training curriculum and outline a training plan, detailing the timing and modalities of training resources by stakeholder group. Figure 78 describes how we define an approach that focuses on clear training and readiness outcomes for all stakeholders.

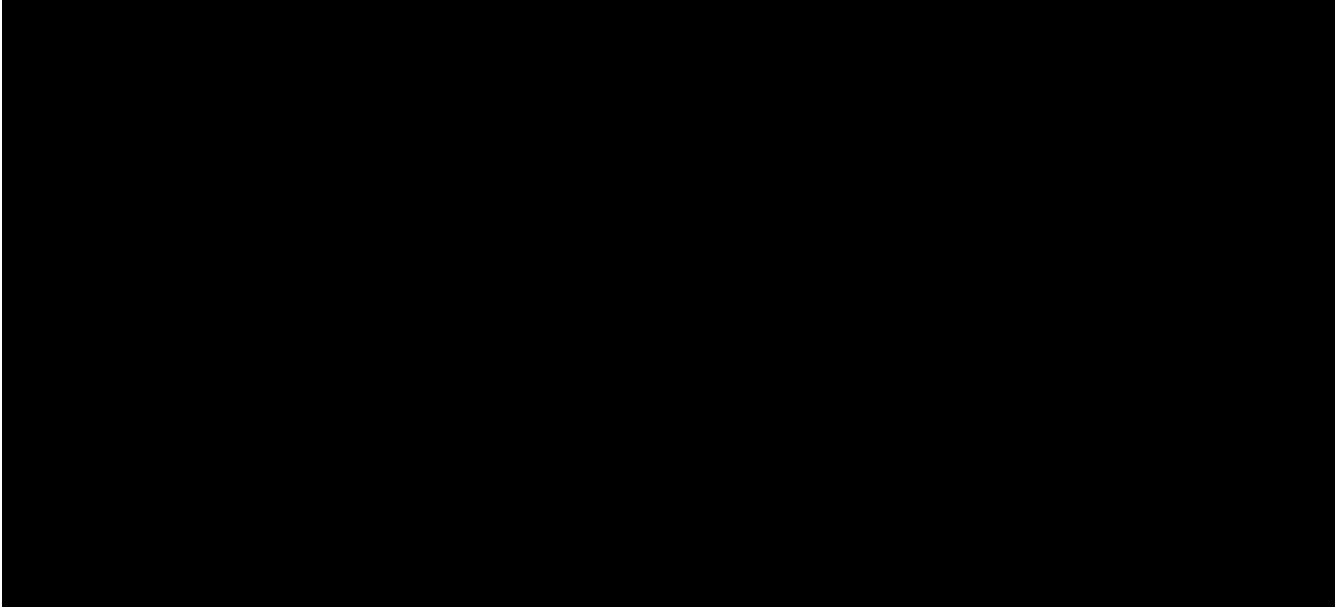


Figure 78. We will utilize a combination of training modalities to meet your stakeholders where they are.

We typically use a mix on-demand learning (e.g., job aids, eLearning's, infographics, etc.), and embedded support (i.e., Salesforce In-Application Guidance)) across all end users, and amplify that learning with instructor-led sessions for highly impacted groups. For live trainings, we find that a train-the-trainer approach works well to embed the capability into the organization and drive sustainability in training.

Training Materials

The Contractor shall provide a high-quality training material for all end users to ensure a smooth transition. The Contractor will be responsible for creating content, using varying media (live, on-line, recorded, webinars, etc.) that best suits each type of user internal and external to Mason. The training delivery schedule will be developed in line with the Agile methodology and releases of Sprints. At the end of each Sprint (or larger Workflow) a training deliverable (workshop, quick reference card, session or guide should be delivered).

Our training development approach is aligned with the overall agile and system development methodology. We will work closely with the developers to confirm that training requirements are collected for the business processes and functionality first during design, and as functionality is built during sprints during the Build phase, we will develop the corresponding training materials. Some training materials may go across multiple build cycles, depending on the scope of the material and the focus of what is in scope for each build (e.g., a document focusing on an end-to-end process may be built in Salesforce over multiple build cycles, with each build cycle building smaller portions of the content). All training content and deliverables built during and after each Build phase, sprint, or workflow will be built with the intent of broader, outside project team use in order to maximize the use cases and useability at and post go-live. Content can include courses, workshops, job aids/quick reference cards, videos, and others.

As training curriculum is developed, we will create a development cycle for training deployment based on impacted stakeholders and future state processes that proactively informs, educates, and reinforces

sustainable skills. More specifically it details the training vehicles by audience, the timeline for development and delivery as well as the different quality reviewers.

For more information about the training material refer to the Training Materials Development section below.

Training Delivery

The Contractor shall deliver end user training up within agreed upon timeframe after each major rollout phase. The Contractor shall also deliver comprehensive Train-the-Trainer and Super User courses to designated embedded Mason staff from affected Mason Units to enable on-going training after the Mason implementation and completion of the required Contractor-led end user training.

The process of identifying the right training delivery method is critical to confirm a successful seamless transition. A decision matrix/consideration for delivery methods will be developed as part of the Change Management Strategy and Training Plan. We will partner with Mason to identify the right time to deliver training to end users. In our experience, a “just-in-time” approach works best, so we will align our delivery timeline with the overall project timeline and target training delivery for end users within 30 days prior to launch.

A critical component of program execution will be the Train-The-Trainer/Super User training. As part of this approach, we will work with Mason to identify the right individuals to become Super Users and trainers. Once the individuals are identified, we will develop a train the trainer program to empower trainers to be prepared to deliver training. During this training, Accenture will equip a group of identified trainers with project knowledge, tools, practice activities, and references and they in turn will provide training to the end user audience. Our approach includes Mason trainer participation in training delivery during the implementation to provide multiple learning and practice opportunities prior to owning training delivery post training development cycles.

As part of this approach, we like to include super users and trainers, or those who may be identified, to take part in other project activities, such as participating in demos and User Acceptance Testing as a way to gain familiarity with the system in advance of Train the Trainer activities.

Training Staff

The Contractor must provide a sufficient number of staff to successfully accomplish all of the requirements of the Training Plan. The Contractor training team must have proven experience in the development and delivery of comprehensive training to support organizational transformation as it relates to a transition to a new system. The training group must have robust experience training end users and rolling out new systems, creating and delivering scenario-based train-the-trainer and end user training.

Additionally, the training team must understand Higher Ed Student Lifecycle systems and processes and maintain a high level of professionalism in all interactions with Mason, stakeholders, and Mason Project Team members. The Contractor shall provide a lead resource (DDI Training Lead) to lead the Contractor's efforts to develop and execute the Training Plan and serve in a peer management role to the Mason Unit Manager.

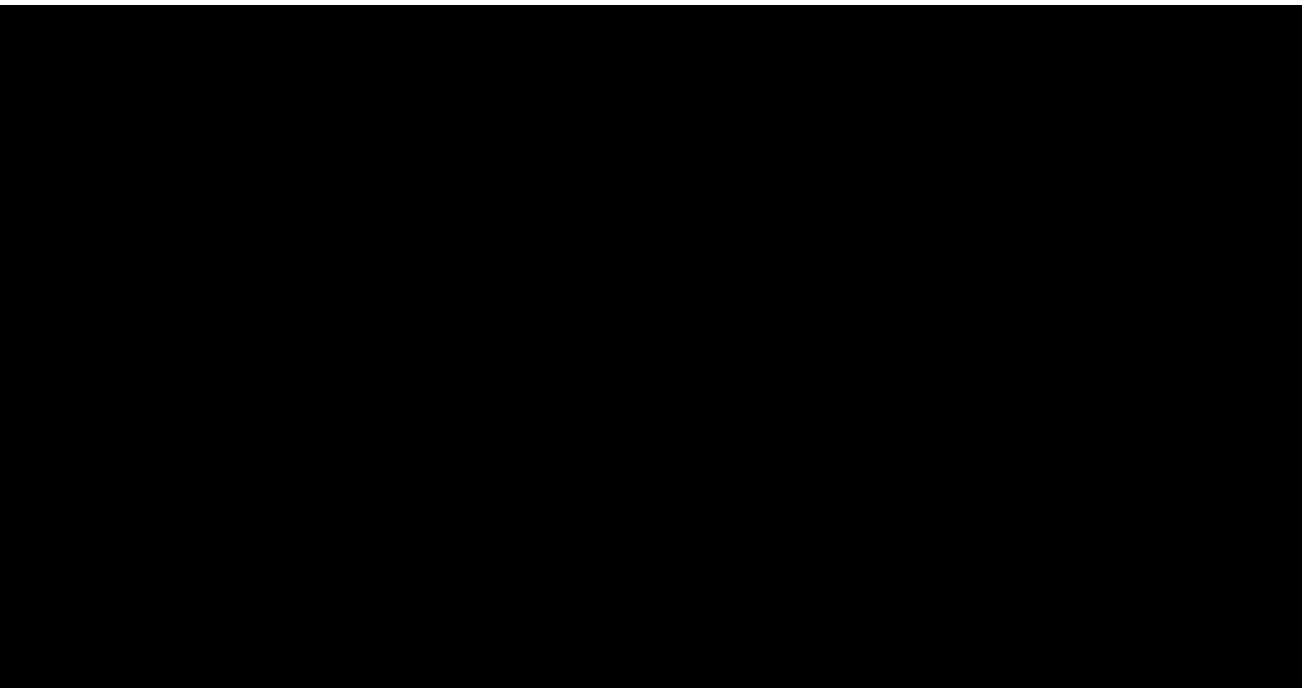
Collaborating with Mason

The Mason Lead shall provide oversight of the Contractor-led training effort as well as supervising the Mason team. Mason and/or vendor will provide insight, experience, and scheduling/logistic support to the DDI Contractor. They shall also be responsible for review and approval of Mason stakeholder communications and Mason stakeholder engagement. The Contractor shall engage designated Mason staff and staff development early in the process so that the Mason staff can gain expertise in the Mason system's workflow and functionality. The Contractor shall be expected to assist and collaborate with the Mason team on these key tasks at integral points and intersections with the training support effort.

The collaborative partnership between Accenture, the Mason Lead and Team will help to inform the inputs needed for training development. We will aim to achieve this with Mason by:

- Reviewing the Training Plan/approach, curriculum, training communications & engagement, training designs, and training materials for feedback and approval with Mason for all training materials and communications before they're shared with end users and before end users are engaged to participate in any training activities
- Provide our Best Practices for an implementation of this size and scope including recommendations for training delivery methods, scheduling, and logistics
- Define clear roles and responsibilities for clarity of ownership across the team, but show up with a "One Team" mentality; the only path to project success is shared success, not Accenture or Mason success.

Figure 79 shows how Accenture and Mason will work together for the entire Training Development in Iterative Collaborative Cycles.



Responsibilities

Further details of the Contractor’s training responsibilities are provided below.

The Training teams roles and responsibilities for implementing the Training Strategy/Approach, including creating training designs, building training materials, and delivering end user training, are documented in Figure 80.

Role	
OCM Communications Team	
Training Team	
Functional and Technical Teams	

Figure 80. Our training team will be responsible for implementing the training strategy seamlessly.

Contractor Training Plan

Contractor Training Plan: The Contractor shall plan and develop a robust training program for all pilot and Mason-wide implementations in collaboration with the Mason team. The DDI Contractor shall create and maintain a detailed Training Plan that must include at a minimum: scope, objectives, schedule, training tools, roles and responsibilities, training environments, approach and methodology, training types, materials, evaluation approach, knowledge transfer approach, and approval criteria.

The Accenture training team will develop the Training Plan, as described in Figure **Figure 81**81. To do this we will coordinate with the Mason Lead/team to understand the available training vehicles. We will review their understanding of the learning environment – accounting for their recommendations for the best way to engage learners from all stakeholder groups as well as the potential training windows and blackout dates. We will summarize our recommendations and experience with Salesforce training and complex higher education implementations. After the initial meetings, we will recommend a training plan that summarizes

the approach for training, the timeline, the training vehicles we will use, and roles and finalized responsibilities for training.

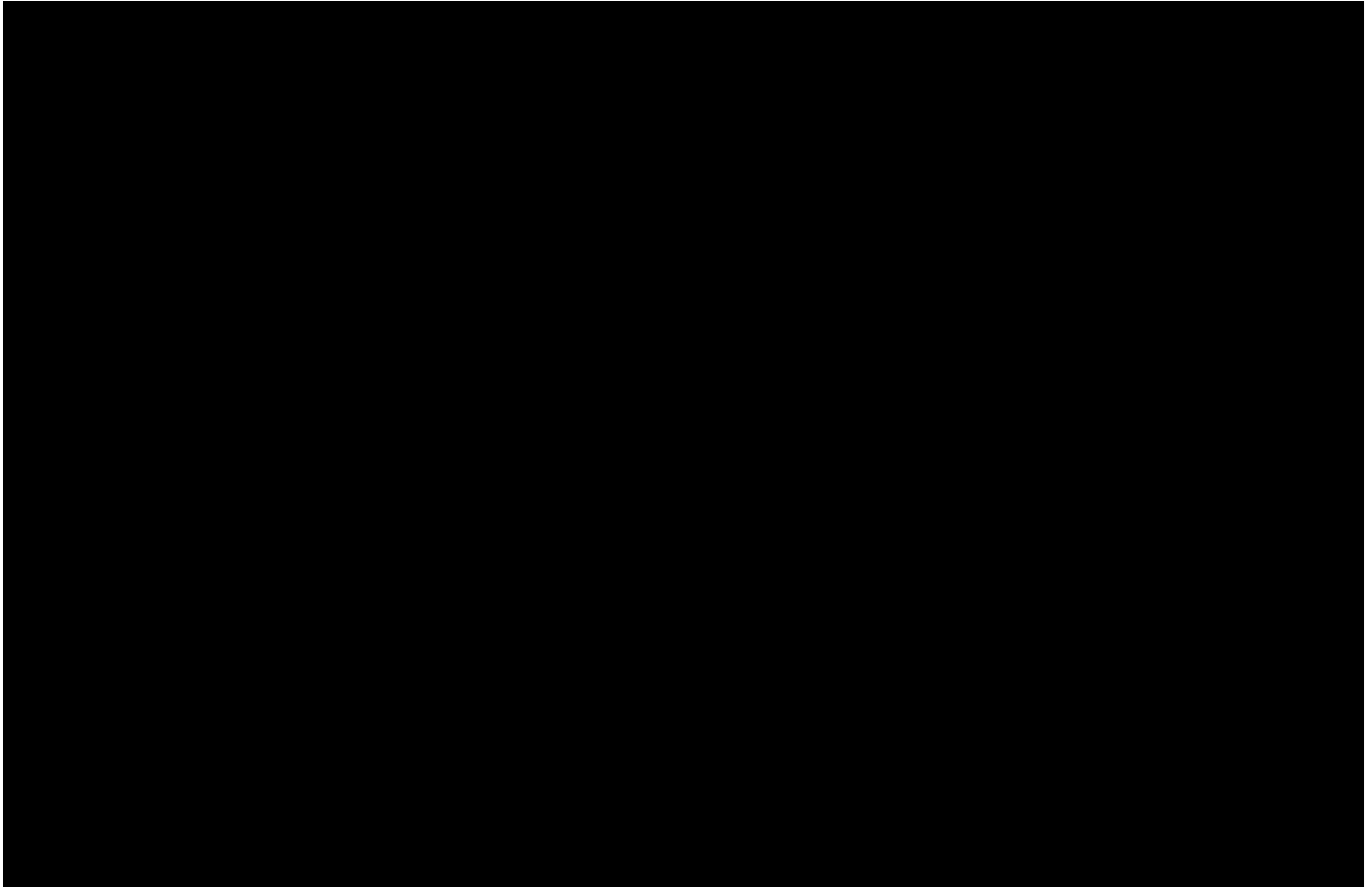


Figure 81. We will develop the training plan in collaboration with Mason.

After agreement on the training plan, we will develop a training curriculum. The curriculum guides development for training deployment based on impacted stakeholders and future state processes that proactively informs, educates, and reinforces sustainable skills. More specifically it details the training vehicles by audience, the timeline for development and delivery as well as the different quality reviewers.

Materials Development

Materials Development: The Contractor shall be responsible for the curriculum development and materials development for all training courses, and incorporate feedback from the Mason team. After training is complete, all materials must be handed over to Mason in a format that would allow Mason to make edits (e.g., in Word or PowerPoint format rather than secured PDF). Training materials includes the following, at a minimum:

- Training content for all trainings, including supplementary documents such as quick reference cards and exercises to test knowledge retention
- Instructor guides with screenshots for Mason trainers who go through the Train-the-Trainer courses (from the Mason team)
- Leave behind materials
- Materials for a variety of training delivery methods, including classroom training, eLearning, and recorded trainings to accommodate end user schedules and limitations
- A comprehensive User Manuals
- Capture and maintain a repository of Frequently Asked Questions

- Survey trainees at the end of every live training session and deliver response data back to Mason to identify gaps/additional needs

Our training approach includes multiple training delivery vehicles, such as quick reference guides or job aids, eLearning, instructor-led/classroom training, including instructor guides for trainers, FAQs, and “leave behind” materials, such as job aids, and where applicable, user manuals. We will tailor the specific delivery methods to meet the needs of both Mason and the details of the solution. As we build materials, we will develop standards for training materials that accounting for the evolving nature of cloud technology and built with sustainability in mind to create less administrative overhead post deployment for any system updates that happen with impacts to associated training materials. Figure 82 outlines our 70/20/10 approach to training materials.

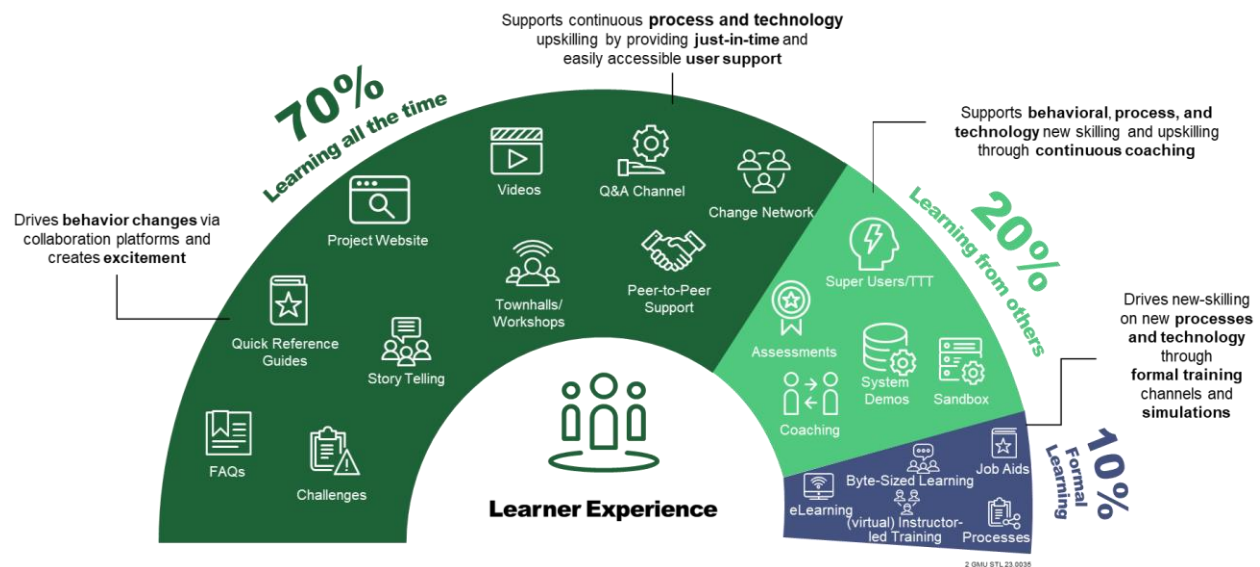


Figure 82. Our approach centers on meeting end users where they are and provides learning opportunities that are realistic and increase focus and retention.

The 70/20/10 approach allows us to create a culture of continuous learning to promote new behavior (70%), Encourages collaboration and opportunities to see best practices from others (20%) and Allows end-users to embrace hands-on learning and develop new skills. Training Delivery will not be a one-time event, but an integrated series of activities and tools to provide Mason’s internal and external end users with a comprehensive learning program to build and sustain new capabilities.

With a blended training delivery approach, each training module may include Instructor-Led Training (ILT), video/animation content, and reference guides. ILT content demonstrates end-to-end processes using the new system and hands-on training activities (gamification). Videos provide short content reminders and examples; typically, these are less than five minutes long. Reference Guides and Job Aids will be pages with tips, tricks, infographics and screenshots about using the system. Sandbox Practice opportunities will be available for individuals to learn and practice independently through the use of online training and review of the training materials. All VILT trainings will be recorded and available to re-watch after the training with access to any supplemental materials shared with end users. For this implementation, we will build up to 40 job aids, 2 hours of eLearning, 14 hours of classroom training, 8 webinars, 8 labs, and the logistical support of 16 labs. We will partner with Mason as part of the regular solution checkpoints to confirm the correct efforts required and how to balance the nature of iterative build and continuous improvement with having materials ready for end users.

Training Evaluations

The Training Evaluation and Assessment Approach for training, including trainer preparation, will be developed during the initial phases of the project. Accenture will lead the design/development of feedback approach for the Training Team to administer throughout the delivery of training, feedback will be collected, and training effectiveness evaluated through the execution of training surveys as referenced in the Training Approach.

Post training session feedback surveys will be given to trainees after all live training sessions to allow the Training team to collect valuable data that will help to identify gaps, additional training and engagement needs. Planned activities to evaluate and measure training include:

- **Completion** – Tracking end user completion of required and recommended role-based training using the LMS
- **Feedback** – Collecting observations from Training Liaisons, super users, and end users during training activities and through online surveys to help understand training effectiveness and opportunities to enhance the training program
- **Evaluation** – Completing knowledge checks built into each training course and tracked using the LMS
- **Application** – Demonstrating proficiency through completion of training exercises during instructor-led training as observed by the trainer

The results of end user training delivery and the feedback received from measurement activities will be shared with Mason and used to improve future trainings and engagement with all end-users. Figure 83 illustrates an example of a course evaluation that Mason could use at their choosing

Course Evaluation					
Course Title					
INSTRUCTIONS: Your response to the following items is valuable for continuous improvement of the Learning Program. Please mark each question as required. Thank you for your time and contribution.					
I. Training Evaluation					
Evaluation for Course	Agree (5)	Partially Agree (4)	Neither Agree Or Disagree (3)	Partially Disagree (2)	Disagree (1)
1. Course content was application to my job	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Course content was interesting and kept my attention	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Presentation was easy to understand	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. Level of details presented was appropriate	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. I would recommend this course to a co-worker	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. Training room was comfortable for training	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. I would recommended this room for other training	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Please identify the strengths and weaknesses of the course and provide any additional comments. (Character limits is 1,500)					

GMU STL 23.0036

Figure 83. This sample course evaluation shows how we evaluate feedback to improve upon our training delivery for Mason end users.

As training materials are finalized, Accenture will provide all training materials in an electronic editable format, including manuals and any other reference documents, to Mason in an electronic editable format for use during and after training delivery. Mason resources will be provided all training and support materials, including:

- Course curriculum (including training requirements and outcomes)
- Training guides for in classroom-based training sessions (ILT)
- Classroom presentation materials for trainers to use during the classroom training session (ILT)

- Storyboards for eLearning courses
- Recorded trainings, demos and demo scripts
- Standalone Quick Reference Guides and Job Aids
- Frequently Asked Questions (FAQs) collected from all stakeholders

The Training team will also coordinate with the Organizational Change Management areas to provide corresponding application and procedure manuals leveraging functional and technical design documents as well as process presentations and guides.

Materials Development

Training Delivery: The Contractor shall deliver trainings according to the approved Training Plan. The Contractor will be responsible for just-in-time end user training as the Mason system rolls out. The Contractor shall provide eLearning and leverage technology to record on-site training to be reused on demand. The Contractor will be responsible for comprehensive training efforts that must:

- Sufficiently train all designated Mason users (see Appendix 12.4)
- Instill a high level of knowledge about Mason in all materials and exercises
- Ensure consistency among all training staff in delivery of content
- Incorporate exercises for the training and sandbox environments
- Provide instructional guides
- Include an issue-escalation process for issues identified in training sessions
- Provide various scheduling and/or virtual training options as necessary
- Include recording of trainings for future reference and virtual trainings

The Organizational Change Management phase utilizes opportunities to engage early and often with leadership and change agents or champions to help Mason users prepare for a successful transition and change to the new solution. Engagement occurs early in the process during the Design and Build phases through iterative solution demos.

Our training philosophy is based on providing knowledge transfer and delivering the right training content to the right audiences at the right times, using a blend of delivery methods that are the most effective for each end-user group. Our Training Delivery is cohesive, brief, and interactive allowing for blended learning and flexibility in how training will be delivered, as described in the training materials section. We will confirm all end-users are prepared for just in time training by:

- Understanding the training needs and preferences of end users to inform the design, development, and delivery of end user training based on stakeholder group and size
- Engaging the right end user subject matter experts who understand Mason's end user groups, policies, process, and procedures to help design, build and test end user training
- Offering multiple training delivery methods and tools that support the diverse needs of end users and can be delivered in multiple locations (eLearning, ILT and VILT, and recorded vILT sessions for re-use)
- Measuring and reporting on training issues/risks/comments, results to confirm training completion, understanding of learning objectives, and identification of opportunities to improve training, as needed
- Proactively addressing reinforcement and training support requirements for post-implementation and continuous learning
- Preparing Accenture trainers to deliver consistent training to all end users for all training modules
- Preparing identified Mason Team members to deliver ongoing end user training and sustain training materials

To support with Training Delivery, the Training team will create a Training Deployment and Measurement Plan, which documents the approach for delivering training and evaluating training effectiveness. The plan will also include the key activities, end user training assignments, resource roles and responsibilities, logistics, and administrative requirements for delivering and measuring end user training. The Training Team will also coordinate with the Mason Training team/SME for each end user group to determine the end user's planned training delivery approach by training course (e.g., ILT or eLearning) and related training logistics needed (e.g., locations for training, number of training facilities, and number of trainers).

After the initial training efforts led by the Contractor, the Contractor must work with Mason staff in facilitating an ongoing knowledge transfer to enable a smooth transition, ensuring Mason is capable of taking over all aspects of Mason training. At project closeout, all aspects of the Mason training shall be turned over to Mason.

Our goal is to confirm that Mason staff are fully equipped to sustain future training delivery and training materials maintenance once the Accenture team transitions off the project. One of our main measures of success is how self-sufficient our clients are as they move into their new ways of working once the project is closed out. We view the partnership with our clients as one of mutual benefit, and we wish to provide ongoing services that focus on strategic value for our clients instead of leaving a client dependent on our services to operate on a day-to-day basis.

We understand the importance of training and knowledge transfer for the Mason team. We will develop a knowledge transfer approach that is right sized for the Mason team. This will include a tracker of individuals from whom they will receive knowledge, key knowledge objectives, descriptions and timelines of knowledge transfer activities, assessment dates, and assessment results. This knowledge transfer process will be managed by the Accenture Training Lead with input from the Mason Lead. Our knowledge transfer also includes content that can be used for the Mason team specific to each phase of the deployment methodology to manage expectations on what to expect and major milestones.

Mason Train-the-Trainer/Super User training

Mason Train-the-Trainer/Super User training: The Contractor shall conduct the Train-the-Trainer and Super User training according to the approved Training Plan. As part of this, the Contractor shall create a comprehensive Train-the-Trainer and Super User curriculum and training materials that shall prepare the Mason staff to conduct end user training. The Train-the-Trainer preparation must instill a Super User-level of knowledge about Mason as well as with all training materials and exercises that might be used during any classroom trainings. It must ensure consistency among all trainers in presentation and content, incorporate exercises for the training and sandbox environment, provide instructional directions and tips for the trainers, and include practice delivery sessions.

The Train-The-Trainer (TTT) and Super User program will further help Mason Trainers to support end-users during and after Training Delivery. These trainers will create a network of resources across Mason that can provide localized delivery of training and post training deployment support. Once trainers have been identified, the Training Team will conduct TTT sessions for Mason Trainers and Super Users that will help enable identified participants to support end users during and after training delivery. TTT consists of the following components, which focus on training skills, delivery of courses identified for ILT, and practice delivery by trainers:

- **TTT Kickoff:** A workshop with all identified trainers to review TTT program requirements and schedule, including training on “how to be a trainer” and tools and resources that will be available for support.
- **TTT Sessions:** Mock delivery of ILT course materials for trainers to learn the content, practice knowledge checks and/or training exercises, and ask questions. This activity also includes participation in Project testing activities for additional hands-on experience in a sandbox environment. Session duration will be planned for 1.5-2 times the expected hour duration of the course to allow time for discussion and practice during this initial exposure to the course materials.

- **Self-Study** – Self-guided review and practice of training materials by trainers and super users following participation in TTT sessions to prepare for both teach-backs and end user training/support. The amount of self-study needed will vary by trainer based on factors such as their familiarity with the functional or technical area and previous training experience.
- **Teach-backs:** Support sessions for each ILT where trainers practice delivery of assigned courses and receive coaching from Accenture trainers and peers. Teach-backs will also be planned for 1.5-2 times the expected hour duration of the course to allow each trainer an opportunity to deliver part of the course, have discussion on what worked well versus what could be improved, ask questions, and practice training exercises.

Feedback will be collected by the Training Team throughout TTT using surveys and facilitated discussions with participating trainers to identify and as appropriate, make final updates to training materials prior to giving end users access. The facilitation materials developed to support trainer preparation, documentation of the activities completed to prepare trainers for training delivery, and the participation of identified trainers will be provided to Mason.

Accenture's TTT approach is not designed to simply train designated trainers in the functionality of the various components. It is also designed to equip them with the tools and skills to provide effective training and support to end users before the training deployment date and beyond. Part of the training will be via a "learn by doing" approach through participation in Test phase activities. This will require additional time from the trainers but is a more cost-efficient method of providing depth of knowledge to trainers to provide the greatest value to end users. After the TTT training, trainers and super users will be able to:

- Define of the change program and the Training and Performance Support approach.
- Describe the Process Design, Business Roles and how they apply to training.
- Explain the various training products including training curriculum, instructor-led training, web-based training, and performance support.
- Deliver training such as context setting, control, direction, and checking knowledge transfer during delivery.
- Implement the evaluation and assessment strategy and the tools for these.
- Execute training preparation requirements.
- Demonstrate keenness, enthusiasm, and passion for training with ability to perform under pressure and stress.

Standalone Mason System Overview Module

Standalone Mason System Overview Module: The DDI Contractor must provide a Mason System Overview training module that effectively demonstrates Mason features on a high-level and provide Mason users context for all subsequent training. Additionally, the Mason System Overview shall be designed to be used as a stand-alone course for select stakeholders who may be non-Mason users. The Mason System Overview training module will need to be recorded and all content and documents must be available for on-going and future use by Mason use after the system is complete.

The fundamental basis of the Mason training approach is that learning will not be a one-time event but ongoing continuously by utilizing performance support tools at the point of need.

To make the training as effective and efficient as possible and to validate sustainability, the training program will be based on a blended learning approach; it will consist of a combination of various learning and performance support methods to train and support the Mason Stakeholders in the most effective and efficient manner. To introduce the training, we will deliver a training overview course that informs and

educates all Mason stakeholders on the high level capabilities of the new system, done via eLearning so it can be utilized and accessed on-demand.

We will also educate all Mason stakeholders on the various types of training delivery that will be executed for the different modules. Additionally in the overview training we will provide clear instructions on how/where a stakeholder can receive support and links to training materials that empower users to find the information they need, when they need it, supporting a just-in-time training approach. This will be in addition to project overview videos launched as part of the Marketing & Communications Plan that lay the foundational knowledge about the project; this will then allow this stand-alone modular course to focus on the key components of the new one-org Salesforce solution.

Project Training Tools, Technical Environments: Training Tenant Environment

Project Training Tools, Technical Environments: The Contractor shall develop separate types of technical environments specifically for training support. This includes training sandbox environments. The training sandbox environments are to be available and used by training staff for preparation of any training materials (e.g., screenshots for guides) as well as for instructional use (e.g., classroom training, end user training).

The training environments shall be utilized by the Contractor and Mason staff for Mason classroom training. One of the training environments shall be used by the Contractor for classroom training and another by Mason in preparing and updating training materials and may be used as an added resource for classroom training. During classroom training, the training environments shall be used to facilitate demonstrations of Mason as well as allow trainees to explore Mason functionality through hands-on exercises. The training environments shall allow multiple training sessions to be conducted concurrently (e.g., four different locations are utilized for classroom training simultaneously during pilot training).

The sandbox environment must be available for trainers to prepare formal training materials and products. It must be available to all users throughout the training effort (as well as post-implementation), allowing users to independently explore all Mason functionality. To facilitate learning, the Contractor shall provide a list of cases available with defined characteristics for trainees to practice through hands-on exercises, which use common scenarios simulating workflow. Additionally, the staff providing on-site support shall utilize the sandbox environment. The sandbox environment shall allow numerous Mason users to access it simultaneously from multiple locations.

The Contractor shall be required to provide sets of data for the training and sandbox environments. The Contractor is required to provide sufficient data to simulate all steps of the varying types of use cases and functionality. The Contractor shall be required to work with the Mason team in the review, selection, and acceptance of sets of data. The Contractor shall be required to develop and follow a process to maintain and update the data in the applicable environments. The Contractor shall be required to develop a schedule and process to maintain the environments as modifications and updates are made to the Mason system.

Training environment(s) are an important element of training, both for development and delivery. In the development process, a training environment confirms training content accuracy and is used to develop videos and demonstrations, and as appropriate, use screenshots for job aids, quick reference guides, eLearning, and classroom/instructor (and/or virtual) instructor-led training.

In training delivery, training environments are needed for users to see and experience the new system, and participate in exercises/"hands-on" practice for key identified transactions. Salesforce environments can be accessed from any physical location, so it can be used for multiple courses across Mason's multiple campuses simultaneously with proper planning.

While the build of an environment may be simple, the data staging and maintenance requires a high level of coordination. Data is staged leveraging a "Sandbox Seeding" application, such as ones from OwnBackup, Gearset, or Copado which Mason may have or procure. Leveraging a tool like this enables the data staging to be semi-automated, allowing for a higher volume of data to be used for more learners with less effort. It can also be maintained post go-live should Mason opt to continue to utilize a training environment, decreasing the efforts required. We will stage data using this type of Mason toolset to generate synthetic data (i.e., fake or masked data) that can be safely used by learners at scale. We will

partner with Mason to confirm the data staging requirements for Mason to review and select applicable data for required training (and other sandbox/practice) use cases before automating the data staged for Mason to approve, as needed.

We have experience building and maintaining Salesforce training environments across industries, and in higher education. We understand the sensitivity to data security; with potential PII and FERPA data in Salesforce environments, we will partner with Mason and identify security requirements and confirm the appropriate controls are in place, such as scrambling data in advance of the training environment build.

Environment management can be complex, and we will bring lessons learned from other implementations (such as having a change control process for any updates made in the Mason system, along with potential periodic environment refreshes) to enable a successful training deployment at Mason. Our experience informs our approach, and we believe the build and maintenance of the training environment will be a collaborative and coordinated activity across modules and stakeholder groups in order to confirm the right data, flow of configuration, functionality, and transaction needs for the training environment(s). After any refresh, we will re-stage (“re-seed”) data leveraging the automated tool with the volume and use cases previously discussed and approved to allow for learners to continue to attend training and independently explore Mason functionality as they build capability and/or need reinforcement in the new system and new ways of working.

Post Implementation (8.)

Hypercare is a dedicated period where Accenture technical and functional team members will be “all-hands-on-deck” to make sure that Mason successfully implements the new functionality. The goal of hypercare is to stand-up and solidify the solution, working to resolve any identified issues and defects – ultimately, to confirm that there are no work disruptions for end users. Ongoing support is provided to Mason including subject matter expertise to address future administrative activities.

Section addresses requirements outlined in Service Needs Section 8 Post Implementation Hypercare paragraphs 1-4



Figure 84 illustrates an example timeline provided below.

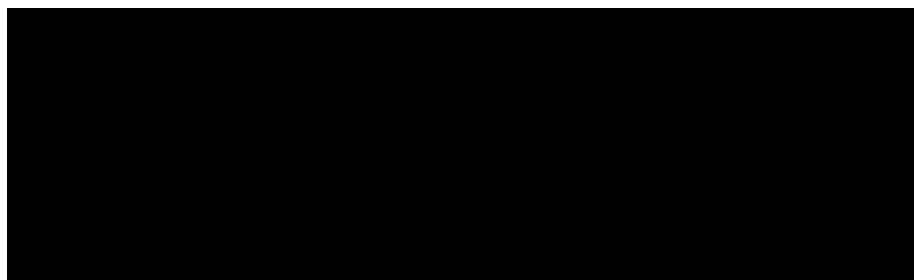


Figure 84. We will plan a similar timeline to provide hypercare & on-going support. We have not included ongoing Tier 3 support in our scope.

We propose 2-4 weeks for a hypercare period depending on the functionality complexity and size of implementation (end users) followed by administrative Tier 3 Support.

Note: Timeline is not exhaustive of change management, hypercare, or planning activities

Interventions are often required post go-live to institutionalize the change within the organization. Measurement helps us to:

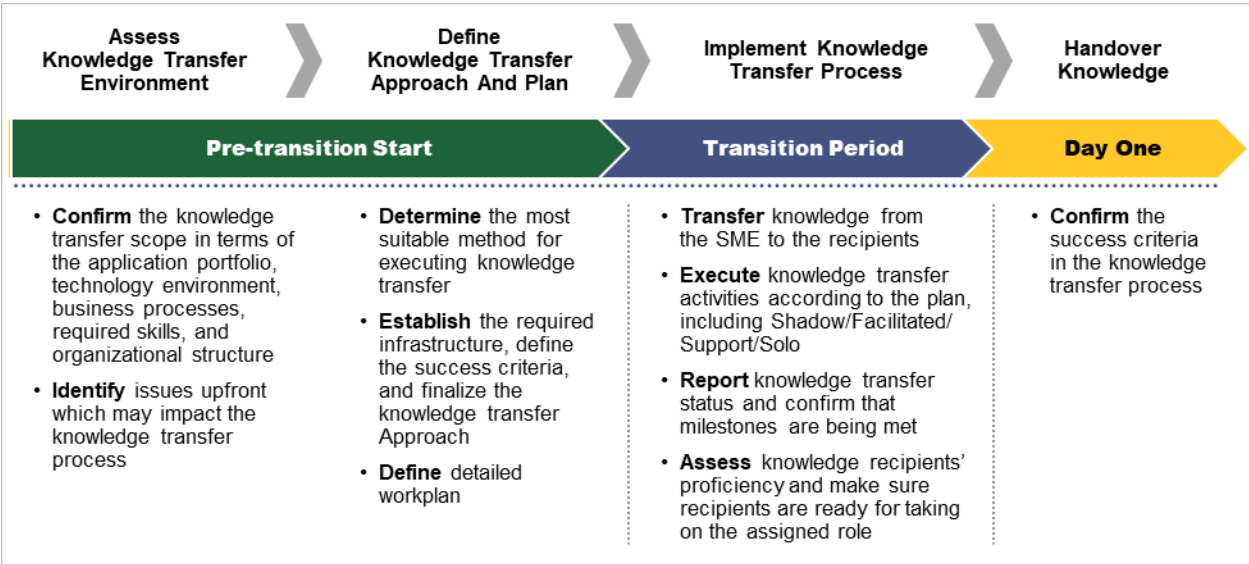
- Confirm areas of successful adoption of the platform are recognized and energize further momentum for adoption.
- Confirm low adoption is noticed and addressed.
- Gain important insights into aspects of the user experience.

Knowledge Transfer (8.1)

A key task that occurs throughout the project is the transfer of system knowledge to Mason staff. This includes hands-on, on-site, face-to-face training. Any COTS or customize software utilized where Mason staff shall be making process, rule, role, or security changes shall also require a final transition of knowledge and training (e.g., BPM, rules engine, IAAM). The Contractor shall ensure that Mason-embedded staff are trained during implementation on how to navigate and complete work in Mason. The Contractor shall have utilized Mason-embedded staff for non-critical path tasks during the Mason Project. Any documentation, such as Standard Operating Procedures (SOPs), Job Aids, checklists, and training materials developed by the Contractor shall be delivered to Mason.

We understand that knowledge transfer is not a one-time occurrence. To be successful, it should be embedded in the project implementation activities through iterative, hands-on learning. Engaging Mason staff early to work with the Accenture team—specifically to build, test, and deploy the new solution—allows Mason staff to build skills and share valuable knowledge and experience to the service delivery team.

Throughout the Student Lifecycle Transformation program, Mason and Accenture will work closely to deliver a system that addresses the way Mason serves its people today, and to prepare Mason resources for the ongoing support and operation of the system. This approach will be developed in collaboration with Mason to understand the capacity of staff for knowledge transfer in parallel with their existing operational responsibilities. As shown in Figure 85, our knowledge transfer approach has four high-level phases.



GMU STL 23.0056

Figure 85. Our knowledge transfer approach provides the structure to build and transition sustainable skills necessary to assume operations.

At the **beginning of the project**, we will collaborate with Mason to validate assumptions on roles and responsibilities for Mason and Accenture team members, as well as additional stakeholders Mason expects to be involved in operating and maintaining the new system. Our experience has shown that the development of the KT Plan should be based on the number of people who will receive knowledge transfer.

For a project of this scale, we propose a role-based approach where KT activities are grouped by functional and technical area. Individuals are then mapped by Mason to these KT roles based on their expected responsibilities after go-live. The Role Learning Plans document the planned activities by role and the participants identified by Mason to engage in assignments with Accenture providing coaching and support.

In the **second phase**, a Role Learning Plan will be developed for each role identified in the KT Plan to create an incremental learning path to develop the desired knowledge and skills of participants. Our approach employs four types of activities in support of this model:

- **Education Session:** The Accenture coach provides an overview of the KT activity, providing a foundational knowledge of the skill or task.
- **Show-and-Tell:** The Accenture coach demonstrates the KT activity while participants observe, ask questions, and prepare to participate in the activity to show how the skill will be obtained or a task will be completed.
- **Hands-On Collaboration:** The Role Learning Plan participant completes an assigned KT activity with support from an Accenture coach to build desired knowledge or skills. This activity is core of our KT approach, providing “shoulder-to-shoulder” learning opportunities throughout the implementation. We emphasize the importance of collaboration, teamwork, and learning by doing.
- **Peer Review:** The Role Learning Plan participant completes an assigned KT activity on their own for review by an Accenture coach. The focus is on the participant demonstrating the ability to perform the skill or task on his or her own in preparation for go-live responsibilities.

The **third phase** of knowledge transfer, implementation, occurs throughout the project allowing Mason team members to continuously grow and understand the solution. Progress of knowledge transfer will be monitored weekly with a monthly status provided to Mason. Status will be based on activity completion and feedback provided by both Accenture Coaches and Mason participants. Accenture will summarize monthly statuses into a quarterly Knowledge Transfer Scorecard that reports on the overall progress of knowledge transfer and identifies opportunities for improvement.

The **final step** is confirmation that knowledge transfer is complete. Accenture will partner with Mason to establish a sign-off process as part of the development of the KT Plan. Following the last knowledge transfer scorecard, Accenture will work with designated Mason leadership to sign-off on the completed knowledge transfer, including documentation, such as job aids, checklists, and training materials.

Training

The Contractor shall provide training to Mason staff that shall maintain Mason after transition from the Contractor. This training shall address the following items, at a minimum:

- Database, software, and hardware maintenance
- Application development/batch support
- Architecture design and maintenance
- Security maintenance
- Testing specifications
- User training tools, methods, and materials
- System administration
- Help desk
- Rules engine
- Any SaaS, Commercial Off-The-Shelf (COTS), or customized software utilized where Mason staff shall be making process, rule, role, or security changes (e.g., BPM, rules engine, IAAM).

As part of Knowledge Transfer, we will support all areas of the business that will maintain all elements of the project after go-live and into ongoing operations. This is across the technical, functional, change and training, and support areas. Different users will need different information, depending on their role in ongoing operations. Our knowledge transfer approach is role-based, so we will identify what elements of the software and project apply to what roles and create tailored, role-based knowledge transfer plans. We view training as a continuum, rather than solely as a one-time event, in line with our change management methodology in growing knowledge, awareness, knowledge, and ability. To that end, applicable roles will receive ongoing support from the project team on topics such as those detailed in Figure 86.

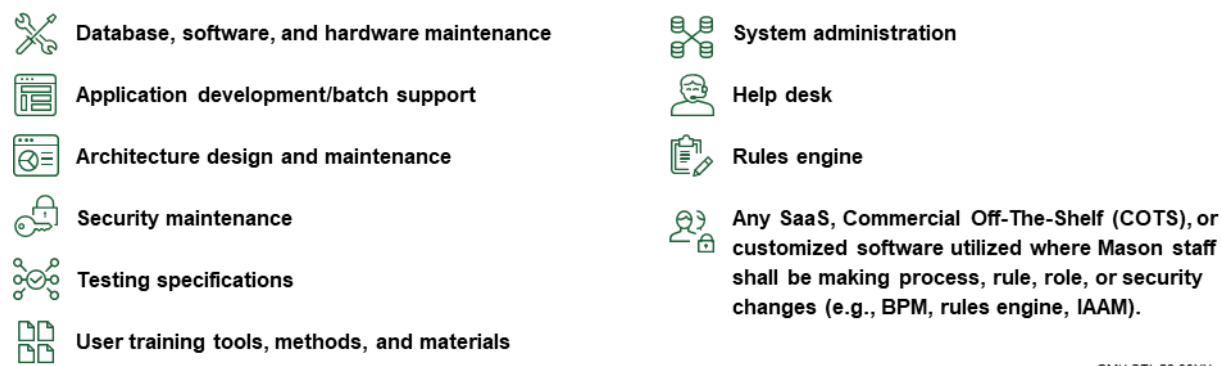


Figure 86. From Accenture, Mason will inherit well-specified technical documentation in the topics listed above to confirm that Mason staff can complete maintenance operations.

Knowledge transfer can include a myriad of delivery methods, including (but not exclusive to):

- Reviewing formal documentation from Salesforce (such as that in Trailhead) or documented by the Accenture and/or Mason project team, including documentation of SOP assets and artifacts that are easily sustained and maintained by an ongoing operation but adaptable pending changes over time
- Attending demonstrations
- Attending knowledge sharing sessions
- Co-developing materials
- Leading a demonstration, with Accenture support
- Doing work review, where Mason leads the effort with Accenture reviewing and supporting
- Job shadowing

Our proven knowledge transfer approach allows for engagement throughout the project, so toward the end, targeted job shadowing and reverse shadowing can be completed to identify any remaining areas of KT required before formally reviewing and signing off on the KT plan.

Job Shadowing

The last four weeks of each phase shall consist of the Contractor staff shadowing Mason staff. Mason defines shadowing as Mason staff taking the lead on performing tasks with Contractor staff watching over the Mason staff to ensure tasks are completed correctly. The Contractor shall be available to Mason staff for questions.

Job shadowing is a critical part of the Knowledge Transfer process. We plan to shadow Mason staff during the last four weeks of each phase to confirm that Mason staff has hands-on experience and can perform their responsibilities well before Accenture departs. Although Accenture is expected to deliver job shadowing during the last four weeks, job shadowing will occur in an informal capacity in the weeks leading up to the last four weeks of each phase when Accenture leans on and consults with Mason staff on building the new system. During these weeks, Accenture will also develop materials and tools necessary for formal official job shadowing sessions to validate that time is as maximized as possible for hands-on experience. This preparation will include Accenture staff assessing all roles that require job shadowing, updating Mason staff with relevant information on how the system affects how they will perform their roles and responsibilities, and documentation, described in Figure 87.

Definitions



Knowledge Transfer: The process of capturing and transferring knowledge from Accenture to Mason. It is the most important and critical stage of transition. At the end of the Knowledge Transfer (KT) activities, KT recipients will be able to perform the in-scope processes previously performed by Accenture.



Job Shadowing: On-the-job training where assigned Mason become familiar with a work item currently performed by Accenture through the process of following and observing the Accenture individual(s) while performing the work item.

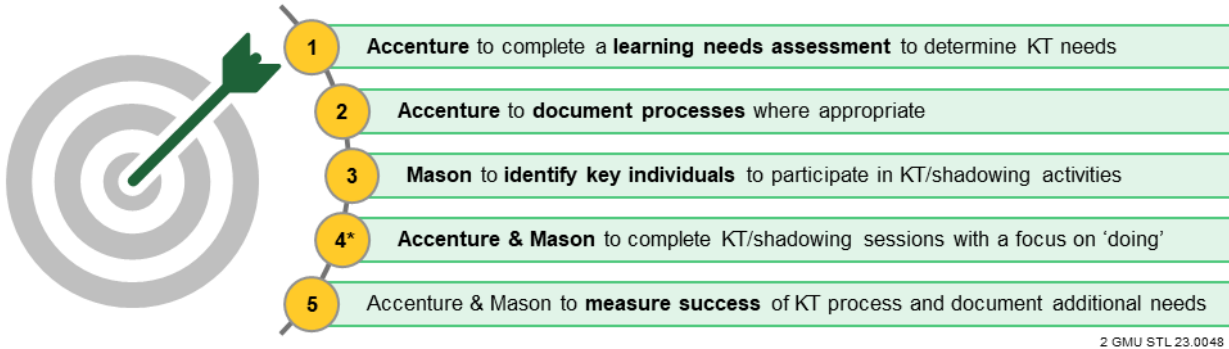


Figure 87. Accenture's approach to job shadowing, a core component of its Knowledge Transfer methodology, is briefly outlined above.

We recommend thorough documentation of main responsibilities, tasks, processes, how-to (trainings, user guides, job aids, etc.) for every role, which it will borrow from the content coming out of the design, build, and testing phases of the implementation.

We will create a job shadowing plan, similar to a learning curriculum, to structure the hands-on learning, and will communicate the schedule of planned lessons ahead of time to Mason staff. The 'how-to' materials will include scenario-based prompts mimicking the systems-based tasks that Mason staff typically perform for student advising and recruiting admissions and how to complete their jobs in the new environment. Accenture will distribute these informational documents ahead of time to Mason staff to allow Mason staff the opportunity to learn and process the information on their own and prepare questions that Accenture will be available to answer during the shadow sessions. Each Accenture staff conducting the shadowing will tailor the session to the learning style(s) of the Mason staff, acknowledging that there are multiple types of job shadowing: observation, regular, briefings, and hands-on.

At the end of each job shadowing session, Accenture will test Mason staff in a low-stakes environment and solicit feedback on Mason staff's confidence with using the new system to perform their tasks to assess the efficacy of its job shadowing plan and adjust it where required.

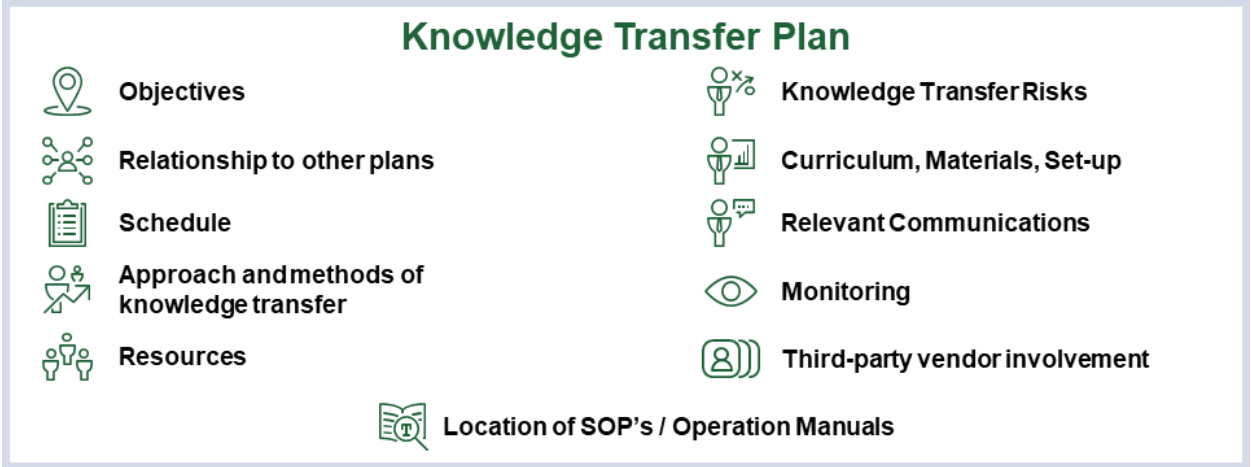
Knowledge Transfer Plan

The Contractor shall create a Knowledge Transfer Plan that includes but is not limited to the following:

- Objectives
- Relationship to other plans
- Schedule
- Approach and methods of knowledge transfer
- Resources
- Knowledge Transfer Risks
- Curriculum, Materials, Set-up
- Relevant communications
- Monitoring, metrics, and evaluation criteria
- Any third-party vendor involvement

- **Location of all SOPs, operations manuals for hardware and software products, checklists, etc. that have been written throughout the project.**

The goal of knowledge transfer is successful transition of system ownership at go-live and beyond. To achieve this, we need to have the right framework to identifying the approach and tracking knowledge transfer over time. To that end, a knowledge transfer plan (KT Plan) will be developed that outlines the overarching approach for knowledge transfer specific to this project. We have standard knowledge transfer plans from similar implementations that we will bring as a best practice and accelerator to developing a KT plan specific to Mason. The knowledge transfer plan will identify the approach and methods of KT; samples were described in previous sections. Figure 88 below describes the key elements of a successful KT Plan.



GMU STL 23.0012G

Figure 88. Accenture will build a comprehensive Knowledge Transfer Plan, so the Mason staff are regularly informed and involved throughout the transformation.

Part of the Knowledge Transfer Plan will include developing role-based plans, or RLPs, for each role identified to support an element of the project in ongoing operations. These plans will be developed and tailored to the roles and responsibilities of the individual, and knowledge transfer will be focused on key knowledge needed to maintain the solution in ongoing operations. Note there may be some external elements identified as pre-requisites to knowledge transfer, such as Salesforce-led training and certifications (to those who will need foundational Salesforce knowledge and skill). The KT Plan will provide a holistic view of all activities that need to be complete in order to achieve the targeted level of knowledge required to operate successfully post go-live.

In our experience, at go-live, users may not be fully proficient, but will have the key knowledge and skills required to operate the solution. In many ways, go-live is a key milestone on the journey, but is the end; as Mason operates in the solution, they will develop additional proficiency over time. Status of the RLPs will be reported on to identify any risks or issues that may prevent success at go-live to proactively work to resolve risks before they become issues. A common challenge is the perception of “finding the time” to do knowledge transfer; this is why our methodology ties knowledge transfer as closely as possible to the work to be completed. That way, knowledge transfer is embedded in the work, rather than being an additional task or responsibility on top of the work.



GMU STL 23.0081

Figure 89. To access a digital guide on how to create your own apprenticeship program, click here.

We also acknowledge that recruiting and retaining Salesforce talent is challenging in a highly competitive and tight labor market. Accenture can bring and share our apprenticeship model, where we bring untapped, high-potential individuals lacking access to conventional recruitment opportunities (without Salesforce background) through a year-long apprenticeship program where they are skilled in developing and/or implementing an area of Salesforce. An interactive apprenticeship guide can be found on our website [here](#), which you can access by clicking the image of the guide, thumbnail in Figure 89. Should Mason be interested in this model to recruit and retain diverse and untapped talent, we are happy to share more details on our approach overall, and specific to Salesforce in further conversations, illustrated in Figure 90.

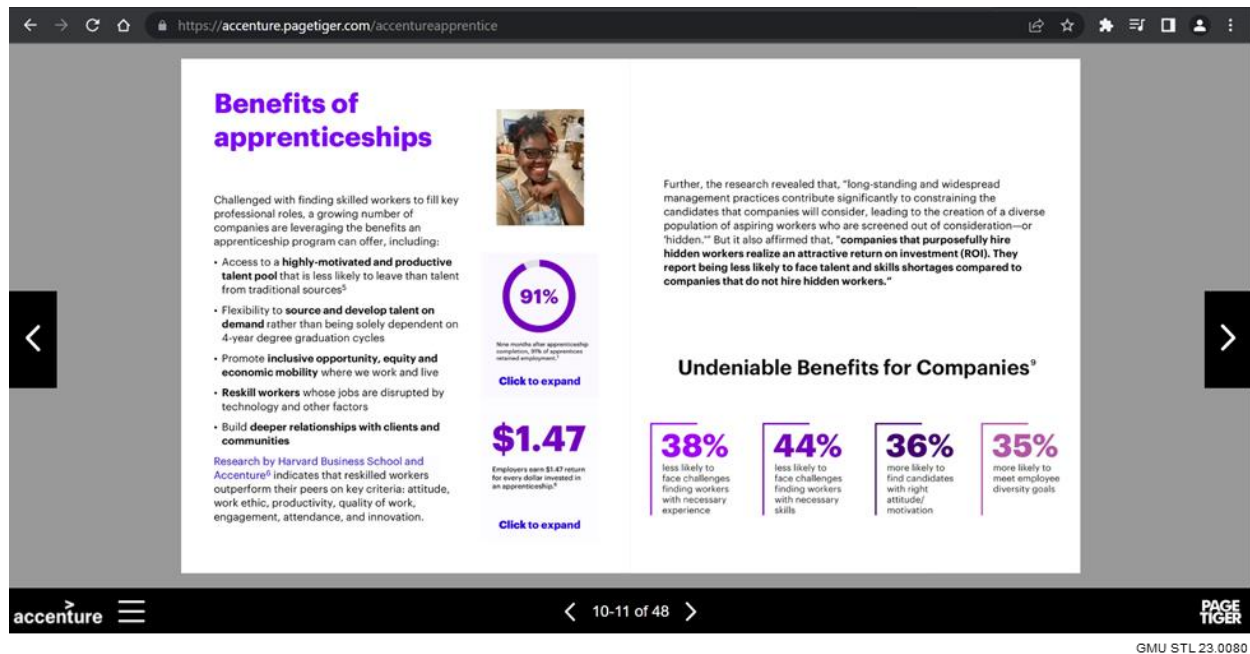


Figure 90. An overview of the benefits of an apprenticeship program, which Mason can create following the model of Accenture's Apprenticeship Program to recruit Salesforce-trained professionals.

Project Management (9.)

Effective planning will provide structure, leadership, and direction throughout the program to successfully deliver the project on time, on scope, on budget and in line with Mason's needs and expectations. These activities for our team will be managed our Project Manager, [REDACTED]

Section addresses requirements outlined in Service Needs Section 9 Project Management paragraphs 1-28



Mason Project Governance and Management (9.1)

Mason's Project Management approach includes the organizational structure, processes, and tools established to ensure projects are completed in a consistent manner.

The Mason Salesforce Executive Committee (SEC) or SEC's designee will provide the overall project management oversight for Mason. The Contractor must collaborate and take direction from Mason via the Mason PMO. The Mason project will be a coordinated project management effort amongst the Contractor and the Mason team (collectively referred to as the Mason Project Team in this Contract).

The Mason Project will be managed through the Mason Salesforce Executive Committee (SEC) or SEC's designee who has overall daily management authority and will be supported by the Mason PMO, and the business and technical managers. This project management team structure defines roles and responsibilities that will aid the Salesforce Executive Committee (SEC) or SEC's designee to actively monitor the planning, execution, and quality of the project. Mason team members will monitor and participate in contractor activities, and review and approve project deliverables along with team staff.

Mason will have a Change Control Board consisting of the Salesforce Executive Committee (SEC) or SEC's designee and members of the user experience team that will lead the review of all change requests.

The Mason Salesforce Executive Committee (SEC) or SEC's designee will set and manage the overall governance structure and task prioritization, issue resolutions, and risk mitigations. We will operate collaboratively, with well-defined roles and responsibilities, on daily project activities and decision-making processes. We based our approach, on our extensive experience managing higher education initiatives and on several guiding principles. Our Project Management Methodology (PMM) follows these simple rules:



Know What You Are Doing: Every project has a plan. A flawed plan will fail. A plan that reflects successful similar projects is positioned to succeed. [REDACTED]



Tailor Your Approach: Every project is unique. We tailor our approach to reflect each client's specific project goals. **We will work with the SEC's to actively monitor the planning, execution, and quality of the project.**



Staff the Project with the Right People: Accenture has incredible breadth and depth across the full range of **required functional and technical skills to deliver this project successfully**. We will assemble a collaborative team focused on delivering business outcomes.



Manage Risks Proactively: We understand the potential issues and risks facing this project. Accenture will take steps to mitigate and monitor the risks from the outset and escalate any issues.



Make Informed Decisions: Utilizing our collective knowledge of similar projects, Accenture cultivates a culture of open, constructive communication both within our team and with SEC's designee and members of the user experience team. **We will help Mason evaluate options and make informed decisions at all levels of the project and review change requests.**



Deliver on Time, on Budget: We will use integrated tools and reporting processes to monitor progress against the schedule, work plan, and budget, correcting course in a timely manner as needed to maintain delivery pace.

Accenture's project management capabilities and resources support on-time, on-budget delivery of the required business outcomes while mitigating issues and risks. Figure 91 describes how our Project Manager will manage the delivery.

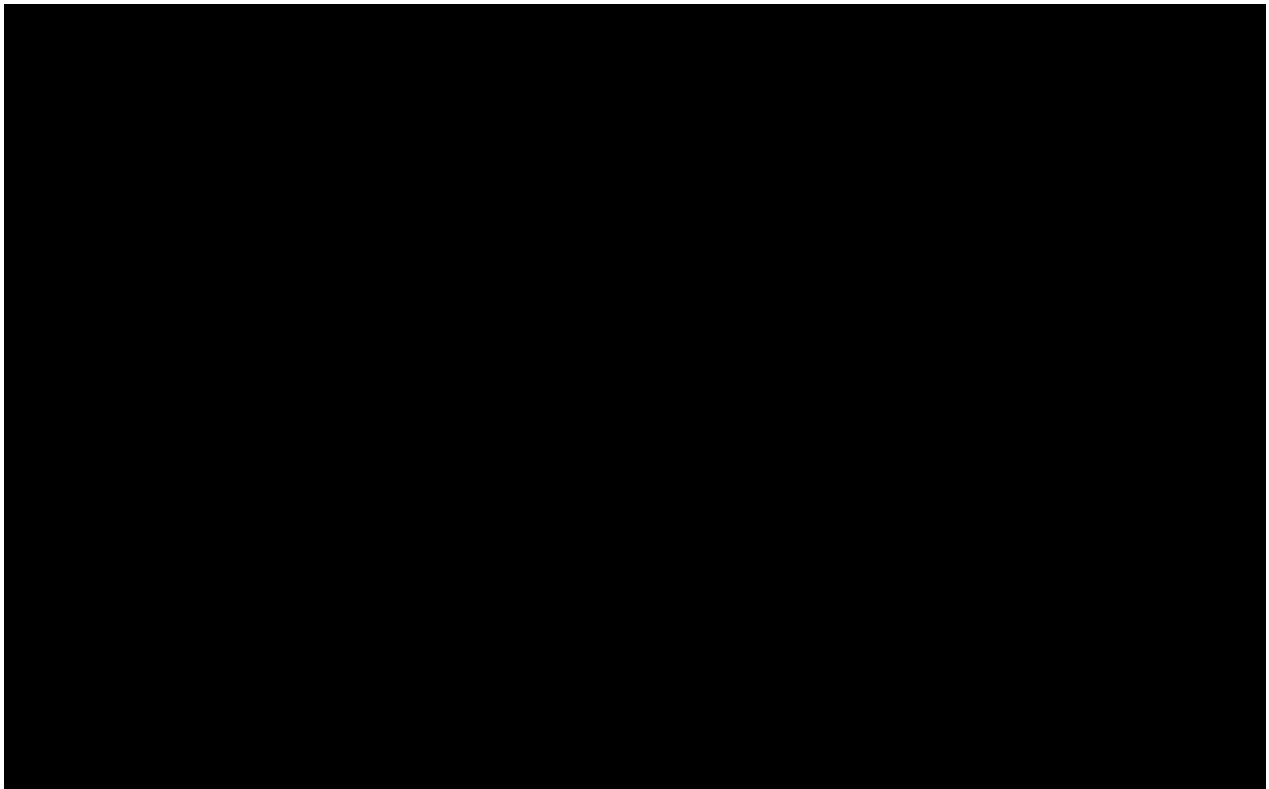


Figure 91. The proof of our project management capabilities and resources is in the demonstrated success on similar projects in the both the public and private sectors.

PMO Project Governance and Management (9.2)

Given the magnitude of the project, different Mason stakeholders will be involved at different stages of the project. During the project planning stage, a specific Mason Governance Manual will be created by Mason and Contractor to detail roles, responsibilities, processes, tools, and templates that will be used to execute the project. The Mason Governance Manual will outline which Mason stakeholders will play active roles in helping the Contractor complete milestones.

It is imperative that the entire Mason Project Team works to ensure a high level of quality across the board, from work packages to deliverables. The Mason PMO will create objectives, standards, practices, and responsibilities for performing project quality management. The Mason PMO will also establish the tools (e.g., checklists) and templates (e.g., delivery expectation document) to conduct quality assessments. The Mason PMO will be responsible for communicating the quality standards and results to the Mason Project Team, Salesforce Executive Committee (SEC) or SEC's designee.

The Mason PMO will work with all Mason Project Team project leads to help facilitate schedule, cost, and quality efforts to ensure a successful outcome. The Mason PMO will maintain the master Project Management Plan for the Mason Project, including a Master Schedule and Risk and Issues and Communications matrices. The Mason PMO will be responsible for the day-to-day management and monitoring of the Mason Project and will monitor that the project processes and tools are being utilized appropriately.

We use a comprehensive PM framework that helps us deliver solutions and services by combining the disciplines, techniques, and tools. Achieving the benefits desired by George Mason will require a project management approach that has strong controls, enforces accountability and transparency, and evaluates progress against objectives. Figure 92 summarizes the key components of our project management controls, which serve as the cornerstone for managing the Mason project in a measured, transparent, and collaborative manner.

Budget management

- A high-level scope statement
- Work plan updates
- Labor and task tracking
- Invoice, billing and payment
- Monthly labor reports
- Budget metrics reports

Resources Management

- Staff the right people
- Cross training
- Manage personnel security requirement
- Maintain continuity

Risk and Issue Management

- Known assumptions and constraints
- Updating issues, risks, and changes

Contract Management

- Communication management
- Documentation management



Management Framework

- Design, pattern, and portfolio management
- Architecture, modelling, and integration
- Roadmap and transition planning
- MITA Strategy, issues, and communication
- Lifecycle development and master schedule

Planning services

- Planning
- Establish and maintain plan
- Manage schedule variances
- Establish interim milestones
- Schedule progress reports

Hybrid Agile development

- Hybrid- Agile Software Development Lifecycle
- Change Control
- Configuration Management

Performance reporting

- Bottom-up reporting
- Status reporting
- Collaborative reviews of priorities and status

Quality Management

- Quality Control Plan
- Continuous improvement
- Independent reviews by Quality Assurance Director

GMU STL 23.0016

Figure 92. Our project management team will coordinate with your stakeholders to share project status, working to achieve project requirements.

Our Responsibilities (9.3)

The Contractor is required to follow the Mason Project Governance Structure once the Project Governance Plan is approved for the project. The Contractor’s overall project management responsibilities include the following:

We will follow the Mason Project Governance Structure once the Project Governance Plan is approved for the project. The following describes how we will meet the overall project management responsibilities addressed in the Service Needs section 9.3-page 58 paragraph 1.

- Adhere to all project quality objectives, standards, and practices.

To manage service quality and consistency, we propose using our Quality which focuses on three core quality functions: delivery excellence, quality assurance, and client satisfaction to improve service value, processes, and predictability.

Accenture aligns to the principle of “first time right delivery,” implementing process controls or checkpoints to produce quality deliverables throughout the project lifecycle. While some controls are specific to individual activities/workstreams, others span across the entire project, as shown in Figure 93.

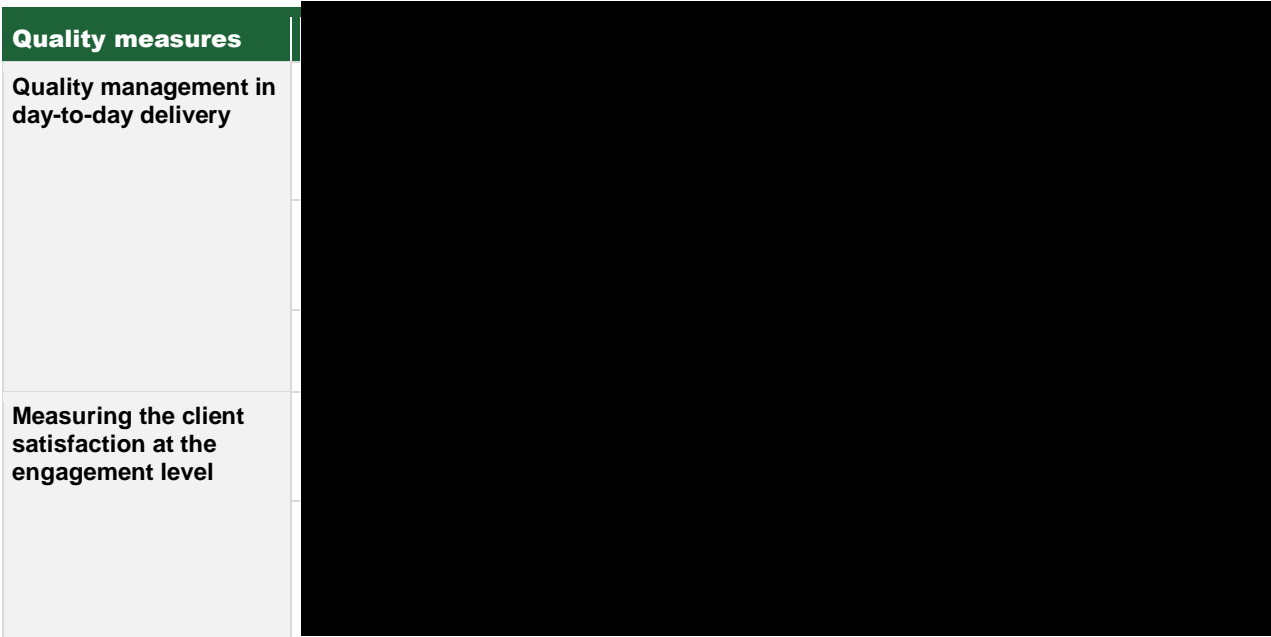


Figure 93. Our quality measures serve day-to-day delivery to Mason’s satisfaction.

If we find any non-conformance items during the review, we identify corrective steps and track each step to closure.

- Lead and manage the DDI portion of the Mason Project using project management practices that will successfully deliver a system that meets Mason’ expectations, on time, and within the contract costs.

Rigorous and collaborative project leadership and management are keys to achieve desired outcomes. Our project management approach is consistent with the Project Management Institute’s (PMI) Project Management Body of Knowledge (PMBOK), and will be used to effectively capture, control, and report project delivery.

- **Work closely with the Mason Project Team to complete the deliverables and milestones throughout the life of the project.**
- **Ensure its activities are coordinated and completed according to approved schedules and plans, messages are appropriately given to teams and stakeholders, and DDI risks and issues are escalated and resolved. Communication will be crucial between parties.**

Close communication and collaboration are critical for the success of any engagement. As part of discovery, we will identify integration points. We will use communication methods outlined in the engagement-specific communications plan to facilitate awareness and understanding.

With the project taking place over the course of multiple years, effective communications will consider how to make summary information about the implementation available for general consumption while also providing the detailed information needed to keep the intended audience groups directly involved and engaged. The communications plan will include communication channels, communication frequency, and the involved roles across stakeholders.

- **Ensure appropriate fiscal stewardship through effective project management practices and communication, so that all parties can adhere to the various plans and schedules, in order to minimize change control and cost overruns.**

The Project Management team will provide oversight and management across all implementation stages of the project. Our effective project management practices support fiscal stewardship providing industrialized processes for rigorous project management, enabling leadership to focus on the various plans and schedules and minimize change control and cost overruns.

We use dedicated teams and resources assigned per solution area, with oversight provided by a leadership team with visibility and insight to the overall project. Our proposed Chief Architect, Jason Thomas, will verify that all components of the solution individually, and in parallel, are being configured/built to address Mason's requirements. We emphasize collaboration and lock-step communication to keep all workstreams moving forward toward the same goals on the same timeframes. We will use well-defined transition points and documentation for each stage, each phase. This enables us to meet the requirements and milestones of each phase for the project.

- **Assist in making work performance measure recommendations that will gauge the Mason Project's health. If contractual work performance measures identify that continual improvement is needed, the Contractor shall assist in the effort to improve performance.**

We review the performance of the engagement through management reports such as status reports and service level performance reports and to engage the Mason team and other relevant stakeholders in identifying performance improvement action items. To measure work performance, we will perform periodic reviews reflected in Figure 94 to identify opportunities for improvement with respective key participants.

Quality audit	
Quality assurance	
Formal reviews of draft and final deliverables	

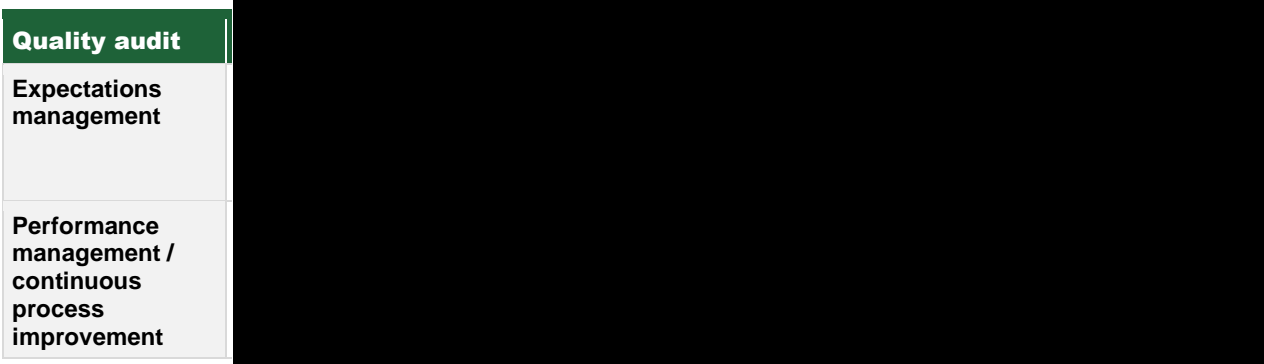


Figure 94. Quality reviews and activities for deliverables and project tasks are integrated throughout delivery to execute successful outcomes.

- Keep the staff resources at appropriate levels during the Mason Project. A resource calendar will need to be created as a part of the Project Management Plan and updated throughout the life of the project.

Staffing determination is based on a Mason’s scope of work and any specific team/skill requirements Mason might have. We expect to right size the support and the team during discovery, the timeline, and any blackout periods to align to the Higher Education calendar. To see the proposed staffing calendar, refer to Section 10.3 Additional Staffing Requirements.

Project Management Plan (9.4)

The Contractor shall develop and implement a DDI Project Management Plan (DDI PMP) in alignment with Mason’s project management approach and incorporating best practices from previous large IT systems projects. The Contractor will generate and execute a Project Management Plan (DDI PMP) that clearly explains how the DDI scope of activities will be managed. The Contractor must collaborate with the Mason Project Team in the creation of the required DDI PMP components. The DDI PMP will follow the deliverable review and acceptance process as defined in Section 10.5. The Contractor will be expected to respond to any issues or findings identified by the Mason PMO, and will be responsible for regularly submitting and updating individual the DDI PMP and Project Schedule to the Mason PMO.

Having a clear and precise Project Management Plan (PMP) establishes a base for the future success of any project. Our team will develop and implement a DDI Project Management Plan (DDI PMP) in alignment with Mason’s project management approach and incorporating best practices from previous large IT systems projects and best practices based on the Project Management Institute’s (PMI) Project Management Body of Knowledge (PMBOK) and Institute of Electrical and Electronics Engineers (IEEE) system and software processes in collaboration with the Mason Project Team.

Figure 95 shows a snapshot of PMP contents in the Service Needs section 9.4-page 58 paragraph 2.



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Figure 95 . A strong project management plan guides the Mason PMO and Accenture leadership throughout the project to provide a common understanding of management processes.

The DDI PMP clearly explains how the DDI scope of activities will be managed and will follow the deliverable review and acceptance process agreed upon during Discovery phase. We will respond to any issues or findings identified by the Mason PMO and will regularly submit and update the DDI PMP and Project Schedule to the Mason PMO.

Project Schedule (9.5)

The Project Schedule is a key component to project management. The Contractor must use the experience gained on other IT systems projects to propose a Project Schedule that is reasonable and attainable based on the requirements. The Project Schedule must reflect implementation of a system that addresses all requirements within a maximum three-year timeframe. Once planning commences, the Project Schedule will be refined and baselined and the Contractor will be held accountable to the agreed upon schedule. The schedule will be reviewed consistently to ensure the Contractor is completing the activities, deliverables, and milestones according to plan. The Contractor will keep the DDI Project Schedule accurate, updated daily, and available to the Mason PMO for importing into the Master Schedule. The DDI Project Schedule will include:

- Fully implemented Mason-wide schedule within a two-year timeframe.
- Work Breakdown Structure (WBS) organized by milestones for all work packages,
- Identified milestones, tasks, task duration, deliverables, dependencies, predecessors, resources (both Mason and Contractor), resource allocation, and start/end dates.
- Clearly identified iteration and release points.
- Clearly identified Mason deliverable review cycles, walk-throughs, demos, etc.
- The Project Schedule must be submitted within thirty (30) days of the Contract start date.

We believe the proposed schedule described above and our approach will enable Mason to successfully navigate their CRM transformation and optimize collaboration opportunities using an iterative process. During the Design phase we will meet with the Mason team to refine and create a baseline schedule. Figure 96 reflect what the final Project Schedule will be submitted to Mason within 30 days of the contract start date and will include the required details.






Schedule Points		Meets Requirements
Fully implemented Mason-wide schedule within a two-year timeframe.		
Work Breakdown Structure (WBS) organized by milestones for all work packages		
Identified milestones, tasks, task duration, deliverables, dependencies, predecessors, resources (both Mason and Contractor), resource allocation, and start/end dates		
Clearly identified iteration and release points		
Clearly identified Mason deliverable review cycles, walk-throughs, demos, etc.		

Figure 96. We will provide the requested schedule points to the final Project Schedule.

Project Preparation

Project preparation is pivotal for a successful assessment as it confirms the team can “hit the ground running” in Week One. In our experience, administrative tasks – such as granting access to university systems – can take longer than expected and can unnecessarily delay a project start. Prior to the official start of the project, we will work with Mason on activities that will enable a quick ramp up. Below are examples of activities that can be completed in this Project Preparation Stage:

- Establishing document repository cites (e.g., MS Teams channels / file structures)
- Completing Mason onboarding requests and granting access to systems, as applicable
- Submitting requests for current state data / documentation to inform planning
- Sharing sample project introduction communications that Mason can tailor to inform stakeholders of project launch and goals
- Sharing status meeting template
- Scheduling initial cadence of meetings (e.g., kickoff and project status meetings)

Project Deliverables (9.6)

The Mason Project requires a concerted planning effort to successfully reach the project goals. The Contractor must submit and receive approval for a Deliverable Expectations Document (DED). Prior to developing any planned deliverables, the Contractor must receive Mason approval of any deliverable's outline, expected content, and format.

The Contractor is expected to ensure all deliverables are submitted complete, error-free, and meet the requirements for the defined deliverable. Any rejected deliverables will require attentive correction. The Contractor should include the following deliverable review times in the proposed Project Schedule unless an alternative review timeline is agreed to in writing.

Deliverable drafts may require additional drafts prior to the review cycle to ensure content is meeting Mason needs. The Contractor should consider past project experiences when creating the schedule for larger deliverables.

If the Salesforce Executive Committee (SEC) or SEC's designee does not accept a deliverable, the Contractor must revise the deliverable and re-submit it for approval. Payment to the Contractor for completion of a deliverable shall not occur until the deliverable is approved by the Salesforce Executive Committee (SEC) or SEC's designee approver. In addition, the Contractor is subject to reduced payments for deliverables that are not submitted by the respective deliverable's deadline.

Deliverable management provides a process to draft, track, review, and obtain approval for project deliverables, in addition to providing a working schedule for each deliverable. Using your deliverable management process, shown in Figure 97, the Deliverable Expectation Documents (DED) will help us set and align on deliverable expectations. We will include the Masons deliverable review times in the proposed Project Schedule unless an alternative review timeline is agreed to in writing.

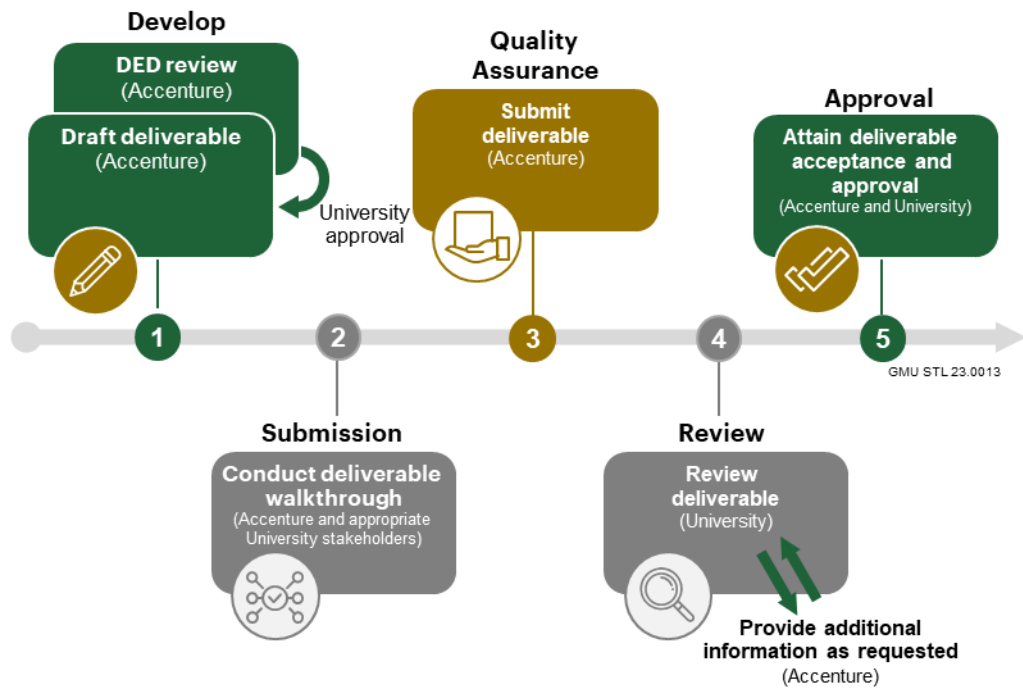


Figure 97. Accenture will use and manage a detailed deliverable tracker for the creation of DEDs from deliverable development through the review and approval process.

We will facilitate a collaborative and open dialog to establish expectations and maintain transparency throughout delivery. Prior to developing any planned deliverables, we will receive Mason approval of any deliverable's outline, expected content, and format. As we prepare DEDs, we will meet with stakeholders to understand criteria and establish expectations. We will then prepare, walk through, and

review the draft DED and submit the final version for approval. Deliverable approval follows a similar process: prepare, walk through, submit and review before finalizing and submitting the deliverable.

To meet the deliverable submittal criteria, we will use and provide a formal transmittal letter, electronic copies, and appropriate, approved templates and project tools. Our project management team will manage deliverables to on-time completion per the project schedule.

Program Change Management (9.7)

Integrated Change Management is the process of reviewing all change requests and approving and managing changes to evaluate the impact to time, cost, and quality. Mason will have a Change Control Board consisting of the Salesforce Executive Committee (SEC) or SEC's designee and members of the user experience team. The following change management process shall be followed:

- A request for a system change shall be initiated by a party of the Mason Project Team.
- Mason shall issue a request for a Change Impact Analysis to the Contractor for a proposed change.
- The Contractor shall analyze, size, and provide proposal / cost estimates via the Change Impact Analysis within fifteen (15) days (or such longer period as the Contractor and Mason may mutually agree) following receipt of the request. The Change Impact Analysis will include description and justification of the change, cost impact, schedule impact, staffing impact, expected deliverables, and system security impact.
- The Contractor shall present the Change Impact Analysis to the Mason Project Team and the Change Control Board.
- Once the Change Impact Analysis has been approved for implementation by Mason (including any modifications made during the review process), the Change Impact Analysis shall be deemed an approved Change Request.
- Mason shall clarify priority and impact on existing enhancements and other change requests.
- The Contractor shall implement the change and update impacted project documents.
- The Mason Project Team shall monitor outcomes.

We will define and document scope early and communicate it clearly, consistently, and frequently to meet shared expectations. To manage scope, we will apply the processes for change reviews and approvals and requirements management. We will work with Mason to integrate with and implement change management processes consistent. Once we receive a request for a change impact analysis from the Steering Committee we will analyze:

- Size and scope of the change
- Cost and schedule impact
- System impact
- Expected deliverables

We will provide our analysis within 15 days, unless agreed to an additional time due to the type of research that needs to be completed. Figure 98 provides an overview of the change management process.

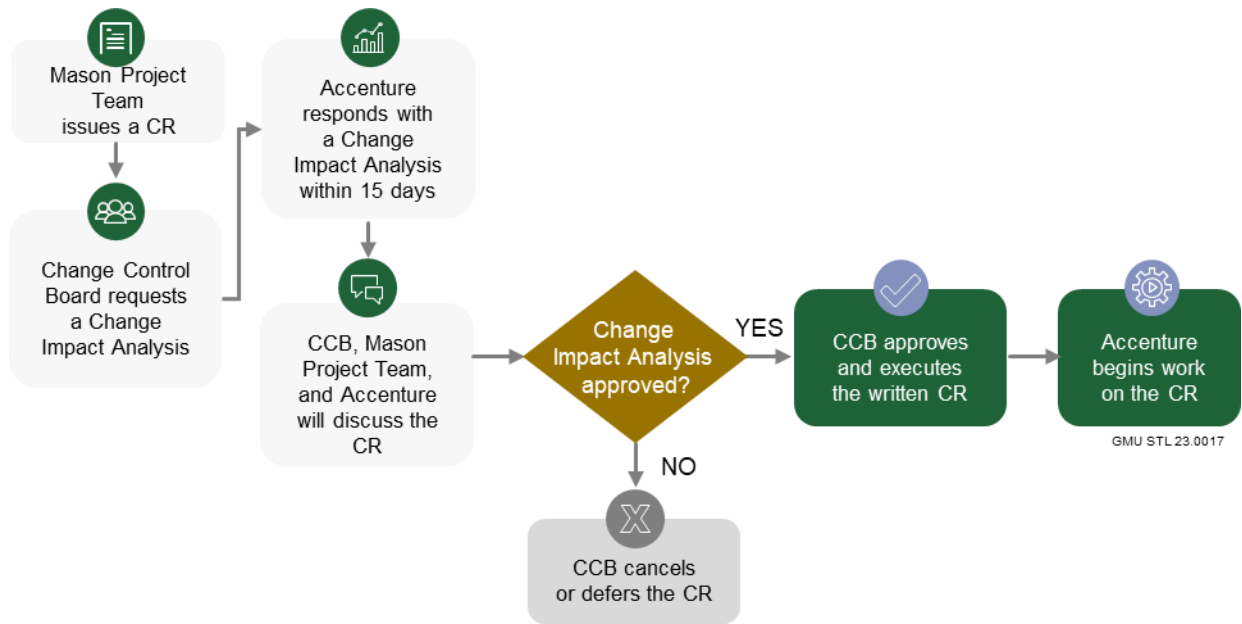


Figure 98. Change management enables the controlled evaluation and management of changes.

Meeting and Reports Requirements (9.8)

Kick Off Meeting. Within ten (10) business days after Contract execution, the Contractor shall schedule an in-person kickoff meeting with key Mason stakeholders, including all members of the Mason Project Team.

During this meeting, the Contractor shall discuss their overall approach to the project and the Mason Project Team will determine timeframes for deliverables that do not yet have a specified deadline, as well as any other outstanding details.

Project Status Reports and Weekly Status Meetings. The Contractor shall provide to the Mason PMO a weekly Project Status Report which, at a minimum, includes updates on tasks (including actual work performed and estimates to complete future work), critical certification challenges, risks, and issues at a glance for executives. The reports must have adequate details throughout the report for the Mason Project Team to understand any actions needed. During the life of the project, the Contractor will meet weekly with the Mason Project Team to review the Project Status Report.

Monthly Executive Report. The Contractor will provide a Monthly Executive Report to Mason’s Salesforce Executive Committee (SEC) or SEC’s designee, Mason PMO, and Executive Sponsor. This report should be sent to the Salesforce Executive Committee (SEC) or SEC’s designee. This will include agreed upon key project metrics such as:

Meeting Attendance. The Contractor shall be available for meetings remotely throughout the duration of the contract. Such meetings may revolve around the overall progress of the project or a specific deliverable. The Contractor staff must further be available for in-person meetings, as required, or remote calls within two (2) business weeks of request.

Every stakeholder needs to understand the “story” behind what is happening. Mason stakeholders rely on up-to-date communication and status updates. We seek to increase visibility into the project health through proactive monitoring and detailed progress reporting and communication. Figure 99 describes the meetings and reports we will facilitate and generate.

Responsibilities	
Kick Off Meeting	

Responsibilities	
Project Status Reports and Weekly Status Meetings	
Monthly Executive Report	
Meeting Attendance	

Figure 99. Meetings and reporting offer Mason comprehensive details.

Communications (9.9)

Throughout the Mason Project, communication will be key to ensuring the Mason Project Teams and all affected stakeholders understand the goals of the project, the project status, and expectations for engagement in the project. The Contractor will be required to participate in and provide input for overall project communications.

It is important that you have a partner with experience communicating with technical and business stakeholders. Some communications will cross stakeholder groups, often providing rapid information such as updates on a release, while others will be tailored and focused on a specific audience. Consistent across both is that key aspects for communications must be defined, including the communicator, recipients, timing, and communication channel(s).

The DDI PMP shall contain a Communications Plan that addresses how the Contractor's project team will communicate internally, with the Mason Project Team members, and beyond to external audiences throughout the life of the project. The Communications Plan shall include, but will not be limited to the following:

- Daily/weekly/monthly communications expectations
- Project Meetings
- Project Escalation
- Project Reporting
- Stakeholder Communications Plan

To ensure all parties are able to fully collaborate, the Contractor must respond to all communication and provide information and assistance within one (1) business day of Mason's request, unless another timeline is agreed upon in writing.

The Contractor will be responsible for ensuring timely updates to the Mason PMO for communications to Mason Executives about the project, and for assisting Mason with communications to other stakeholders.

Our Communications Management Plan will define a framework of standardization to support all communications. The plan will address how our team will communication internally, with the Mason Project Team members, and beyond to external audiences. We will confirm the formal communications during the Discovery Phase. Figure 100 depicts the types of communication we will manage.

Communication	
Daily/weekly/monthly communications expectations	

Communication	
Project Meetings	
Project Escalation	
Project Reporting	
Stakeholder Communications Plan	

Figure 100. We will collaborate with Mason and finalize the reporting processes.

Stakeholder Communications

Stakeholder Communications: Successful implementation is dependent on how well all affected stakeholders are equipped to adopt and adapt to the new environment. Consistent, accurate, timely, and tailored communications is a key component of a successful transition. Mason and the Mason PMO will develop a Mason Stakeholders Communications Matrix that describes roles for overseeing the development and executing all Mason stakeholder communications. Any external Mason communications to Mason vendors need to be approved by the Mason CIO or the CIO’s designee.

The Contractor will create the Stakeholder Communications Plan with the Mason Stakeholders Communications Team’s input. The objective of the plan is to keep all identified external stakeholders informed of project goals, progress, developments, and general project information. As the project proceeds, the Stakeholder Communications Plan will be updated as needed to meet the changing needs of the project. Execution of the Stakeholder Communications Plan will be coordinated and tracked throughout the life of the project by the Contractor and the Mason PMO.

Communications are a given. A best practice we have found is that a robust communications plan should be developed to determine stakeholder groups and messaging required for each group. Bringing Mason stakeholders – from program team members to end users – along on the CRM journey requires a dedicated communication plan. Communications should match the needs of the stakeholder from a pump-up video and message to an announcement about new functionality. We will create a Stakeholder Communications Plan with Mason’s input to identified external stakeholders informed of project goals, progress, developments, and general project information.

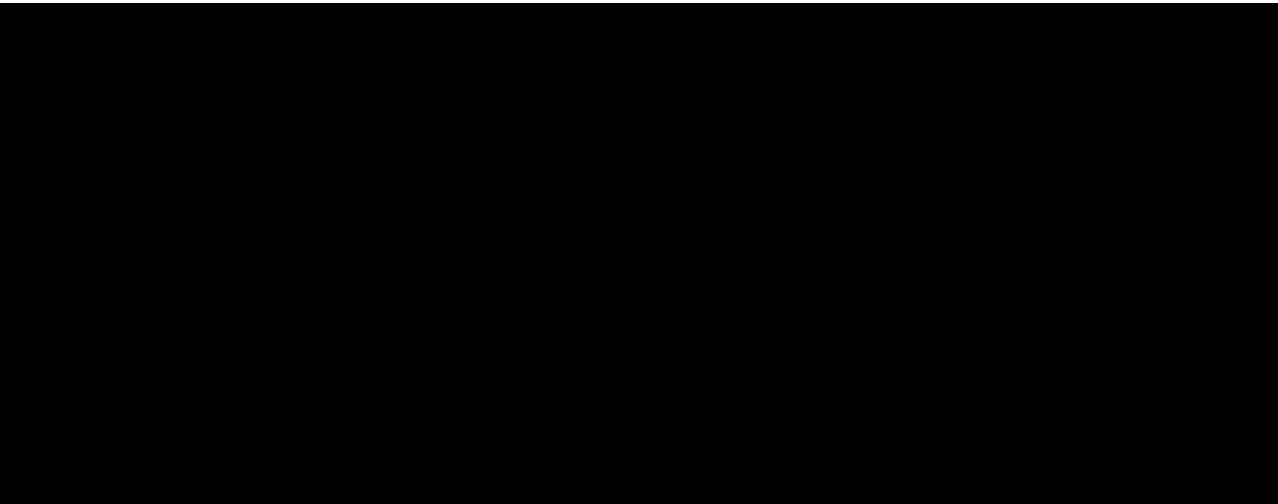
The plan will be updated as needed to meet the needs of the project and tracked throughout the life of the project.

Figure 101 reflects our standard Communication Plan template that we will tailor to meet Mason’s needs.

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Figure 101. We tailor our plans to meet the needs of Mason.





Staffing (10.1)

Service Needs: 10.1, Paragraph 1 - The Contractor shall designate qualified staff members with experience in system design, development, and implementation to this Contract. It is preferred that the Contractor's staff have background and experience working with Salesforce Student Success Hub, Admissions Connect, Marketing Cloud (or similar tool) and with Higher Ed institutions. Additionally, it is preferred that the Contractor's staff has experience working with Banner, ETHOS, and Informatica.

The Contractor is responsible for appropriately managing staff and staff resource levels throughout the duration of the Contract. Based on best practices and experience with projects in similar size and scope, the Contractor is to propose an organizational structure and staff that are able to achieve all of the requirements set forth in this Contract.

With 700+ practitioners, and experience serving 400+ education clients, we are uniquely poised to build a team of seasoned specialists in academic and business consulting for Mason. Our practice is enriched by members bringing direct work experience in higher education. The strength of our Salesforce practice and the breadth of experiences across industry, means we offer Mason the thought leadership, drive, and strength of bench to be able to deliver this project at the top of your expectations.

Section addresses requirements outlined in Service Needs Section 10 Staffing paragraphs 1-9



Location

The Mason Project team will be mostly remote for the duration of this project. Mason reserves the right to request that staff be made available on-site within two weeks' notice, for key project and executive meetings. There will be space provided at this location for a contractually agreed upon number of additional Contractor staff.

We have a global team from which to draw the best talent, for this proposal we plan to have team members located within the United States, including the northern-Virginia area, we will have team members working in, India delivery center. The team members in India will focus on configuration and code for Salesforce, Marketing Cloud, and middleware, testing, training content creation, and Sprint coordination.

Along with having staff members available on-site for key project and executive meetings, we plan to work at George Mason University during the Program Planning and the Design activities between phases. We will also be onsite during Phase/Release Program Planning and Design, Onsite Training and Support, and the Pilot and Go-Live Support.

Our Team

The Contractor is responsible for appropriately managing staff and staff resource levels throughout the duration of the Contract. Based on best practices and experience with projects in similar size and scope, the Contractor is to propose an organizational structure and staff that are able to achieve all of the requirements set forth in this Contract.

We have organized our team to meet your goals and meet the needs of the releases. We have created the phases based on our understanding of the existing student experience, your current technology that supports your tools,

and the new Salesforce Higher Education roadmap and when capability will be introduced to the Education Cloud. Refer to a. Approach to Services, Decentralized Central Model above.

Mason reserves the right to remove any Contractor or subcontractor staff member who is deemed unfit. If Mason deems a staff member unfit, the Contractor shall replace the staff member with another staff member who meets Mason’s approval within ten (10) business days.

We understand that Mason reserves the right to remove any Contractor or subcontractor staff member who is deemed unfit. If Mason deems a staff member unfit, we will replace the staff member with another staff member who meets Mason’s approval, in its reasonable discretion, as quickly as possible.

The Contractor shall provide a Project Manager who will be responsible for all aspects of the Contract and ensure it progresses in a timely and efficient manner. The Project Manager will also be responsible for all deliverables. The Project Manager shall be the main point of contact for Mason and ensure that the Contractor upholds all terms set forth in the Contract.

Vital Positions (10.2)

The Contractor must provide the Vital Positions described in the following table for this Contract. NOTE: add language around expected Salesforce experience AND awareness with new functionality in upcoming releases.

The Contractor must provide Mason with written notification of anticipated vacancies of Vital Positions within two (2) business days of receiving the individual’s resignation notice, the Contractor’s notice to terminate an individual, or the position otherwise becoming vacant. Vacated Vital Positions must be refilled within 30 days of notice (of the vacancy) with a person who has the same or higher qualifications and experience.

Prior to the hiring or re-assigning of any Contractor or subcontractor staff member to a Vital Position, the Contractor must provide Mason with the job description of the particular Vital Position and the employee’s background, biography, and qualifications to justify the employee’s hiring or reassignment and to allow Mason an opportunity to provide its thoughts, concerns, and/or suggestions for Contractor’s consideration. Replacements for Vital Positions shall have qualifications that meet or exceed those specified in the above table.

We have staffed the roster of roles you need for this project with a highly experienced team who we commit to providing assuming the project starts as we expect in July 2023. In the event that one of the team members in a Vital Role leaves the team we will provide a written notification of the vacancy withing two business days. We will refill the position within 30 days with a resource who has the same or higher qualifications and experience. We will provide the potential new candidate’s background, biography, and qualifications that meet the specified requirements and experience addressed in the Vital Roles table 10.2 and discuss with Mason prior to their assignment.

The Vital Roles addressed in table 10.2 are provided in Section 3 Qualifications and Experience.

Additional Staffing Requirements (10.3)

The Contractor is responsible for keeping the staff resources at appropriate levels throughout the duration of the Contract. A resource calendar will need to be created as a part of the DDI PMP and updated throughout the life of the project.

Staffing determination is based on a Mason’s scope of work and any specific team/skill requirements Mason might have. We expect to right size the support and the team during discovery, the timeline, and any blackout periods to align to the Higher Education calendar.

We will staff a team that has the right experience and appropriate skills through the contract to deliver results to Mason. In many cases, the staffing model will include a senior team lead (or leads for larger engagements) with years of relevant industry and/or functional/technical experience managing a team with relevant skills and varying level of experience.

To confirm the appropriate levels of staffing throughout the project, we will create a resource calendar that accounts for levels of support needed at different phases, as well as track team member absences and vacations.

Please refer to Section 3 Qualifications and Experience for more information on Additional Staff and Advisory Group.

The Contractor’s staff will be required to adhere to professionalism expectations in all interactions with Mason. The Contractor’s staff must comply with all written Mason policies, including those related to confidentiality and security. The Contractor will be required to complete all necessary background checks according to federal policies and guidelines (e.g., IRS Publication 1075). On-site Contractor staff may use Mason facilities, furnishings, and supplies only for work to be performed for the Mason Project.

Accenture takes data security and confidentiality very seriously and our people will comply with Mason policies as well as Accenture policies. Unless prohibited by law, Accenture agrees to conduct (or has previously conducted) criminal background checks on personal - including personnel employed by Subcontractors who will have access to Personal Data.

Along with completing the checks according to federal policies and guidelines, we will complete the checks reflected in Figure 102. We will modify the Background Check Items to coincide with current commercially reasonable standards.

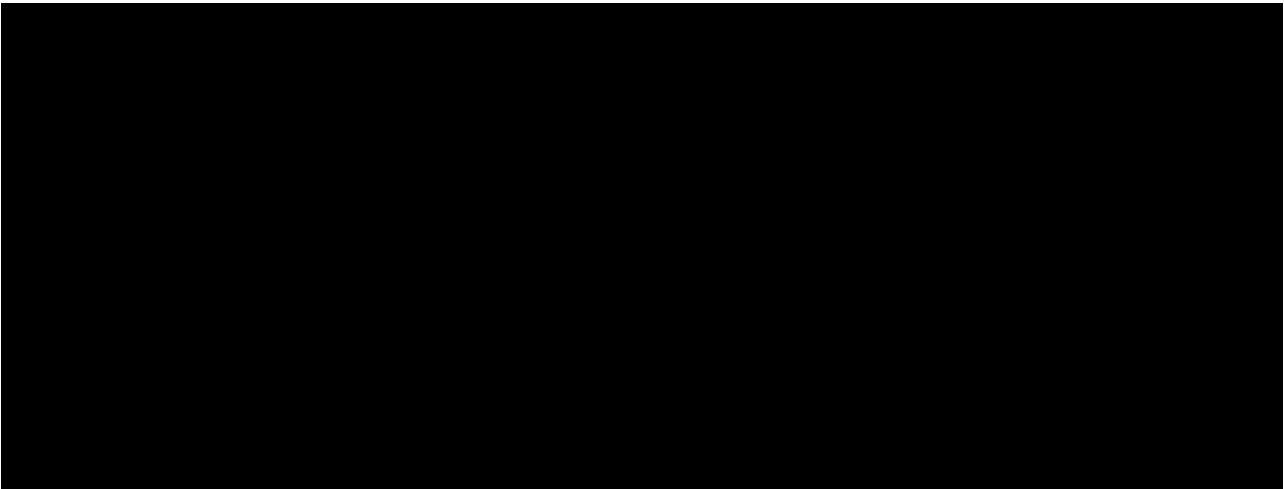


Figure 102. Our background checks are thorough including personnel information applicable to the region they are working in.

The Mason Work Order may include additional requirements and the Parties will allocate the cost of any such additional requirements. During Work Orders, requests by Mason for background check status information will be provided in a reasonable and timely manner.

Accenture will only report whether its personnel have “passed or failed” the background check, and this rationale will apply if the status of the background check has changed. Accenture will not provide specifics regarding criminal background. Accenture will remove any personnel whose status has changed and Personnel who no longer meet Mason’s background check requirement.

In addition to the Vital Positions listed above, the Contractor must also provide additional staff members to assist the team in providing quality service to Mason. These staff positions shall be proposed by the Contractor and approved by Mason. The resources assigned to these roles must have the skills and experience required to build and implement a system of this scope and meet the needs outlined in the Contract.

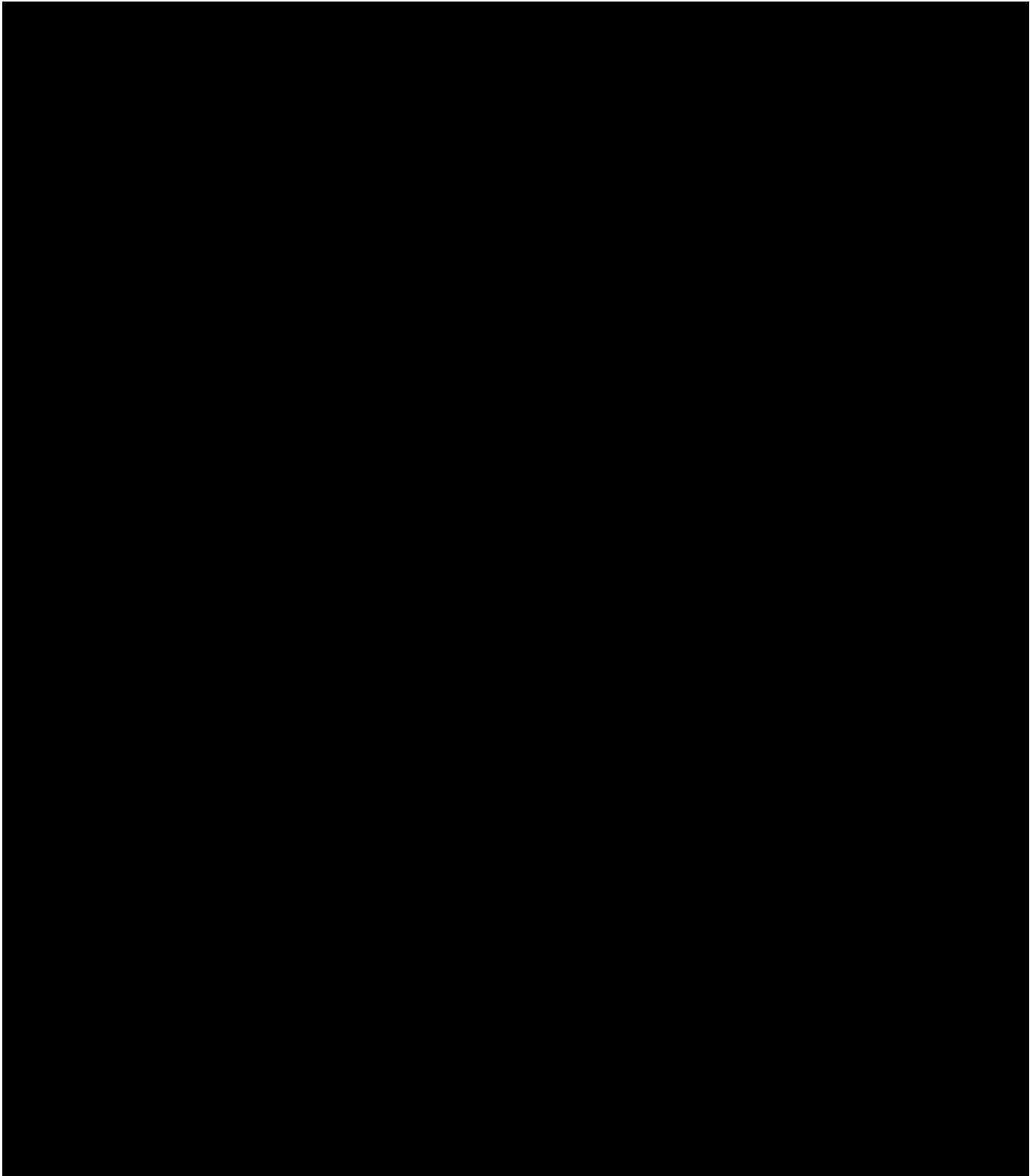
The Vital Positions resumes are provided in Section 3, Qualifications and Experience.

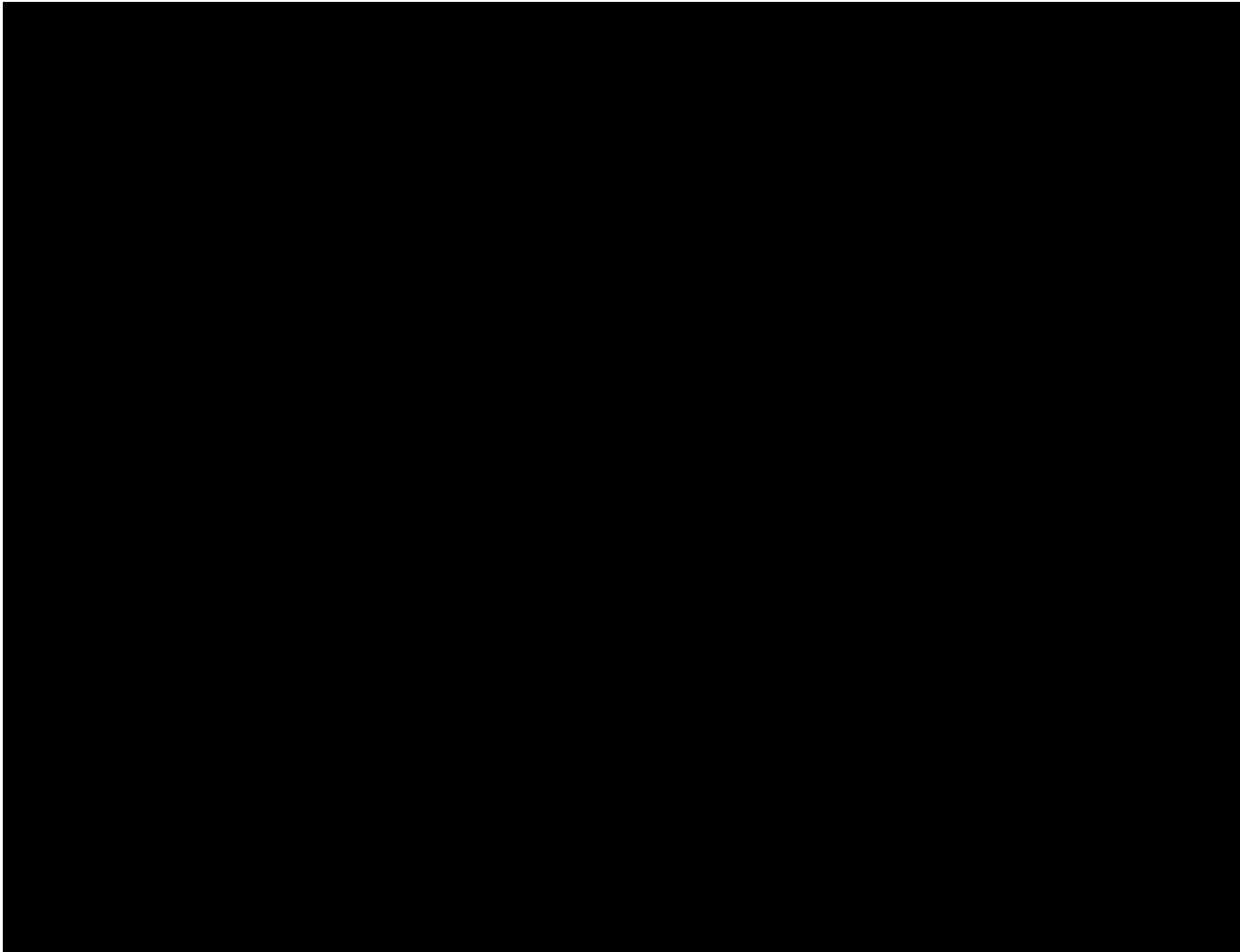
The Contractor must identify, report, and resolve performance issues for its entire staff, including but not limited to the Contractor’s staff members and subcontractors staff members.

Accenture undertakes rigorous performance management and reporting throughout the duration of an engagement. We review performance status, risks, and issues via management reports such as the engagement status report, client report, and service level performance report. We also engage clients and other relevant stakeholders to identify performance improvement action items. We have a proven customer satisfaction process built into our 360° Value Meter.

We work with clients to identify priorities, goals, and values across the six value dimensions: financial, experience, sustainability, talent, inclusion and diversity, and custom topics. We can then help clients measure the impacts of solutions across their business. Our goal is to work with organizations to create a value-led culture, and implementation of the 360° Value Meter is a key part of the journey.

Appendix Items (11.0)





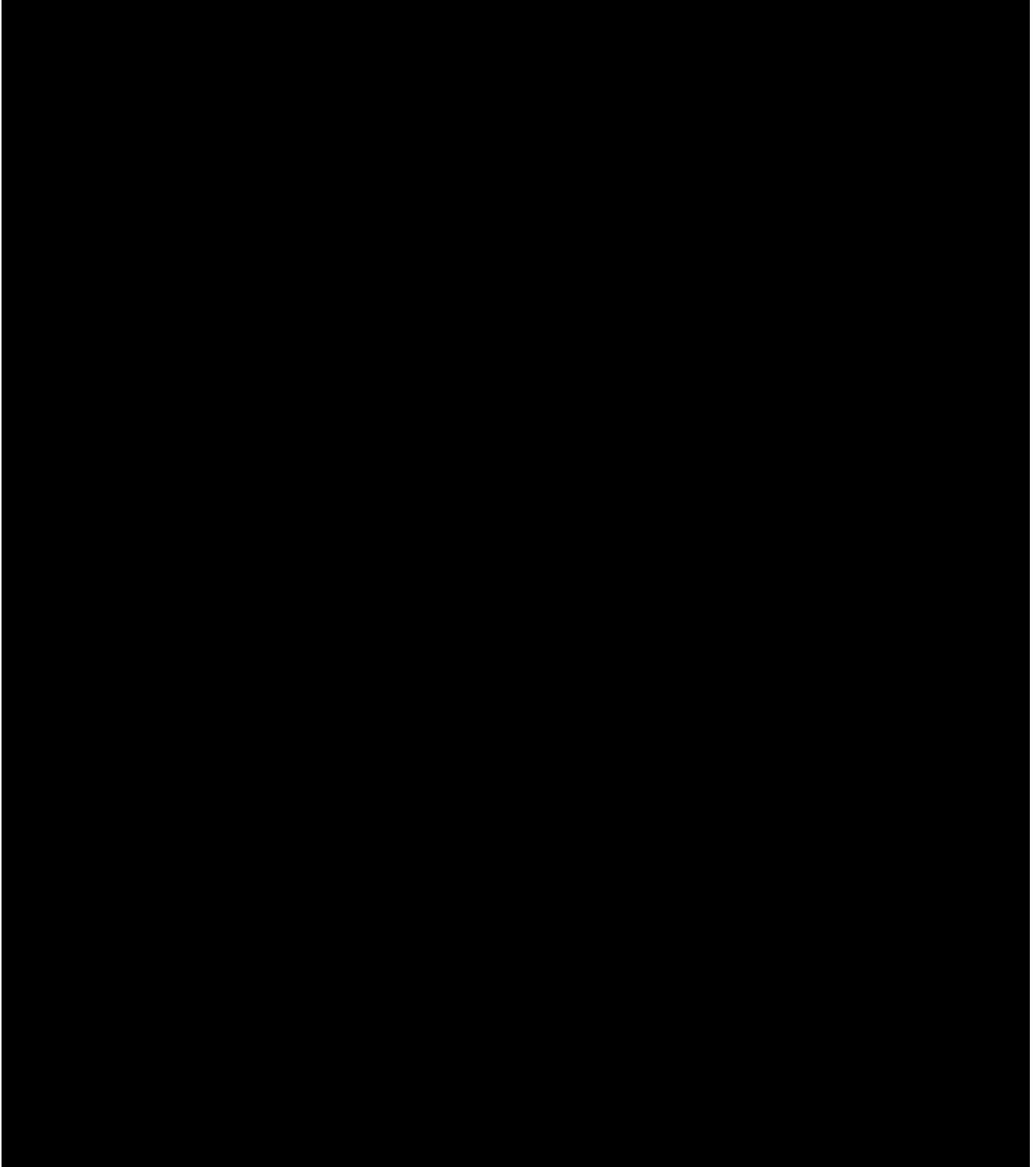


XIV

Proposed Pricing



XIV Proposed Pricing

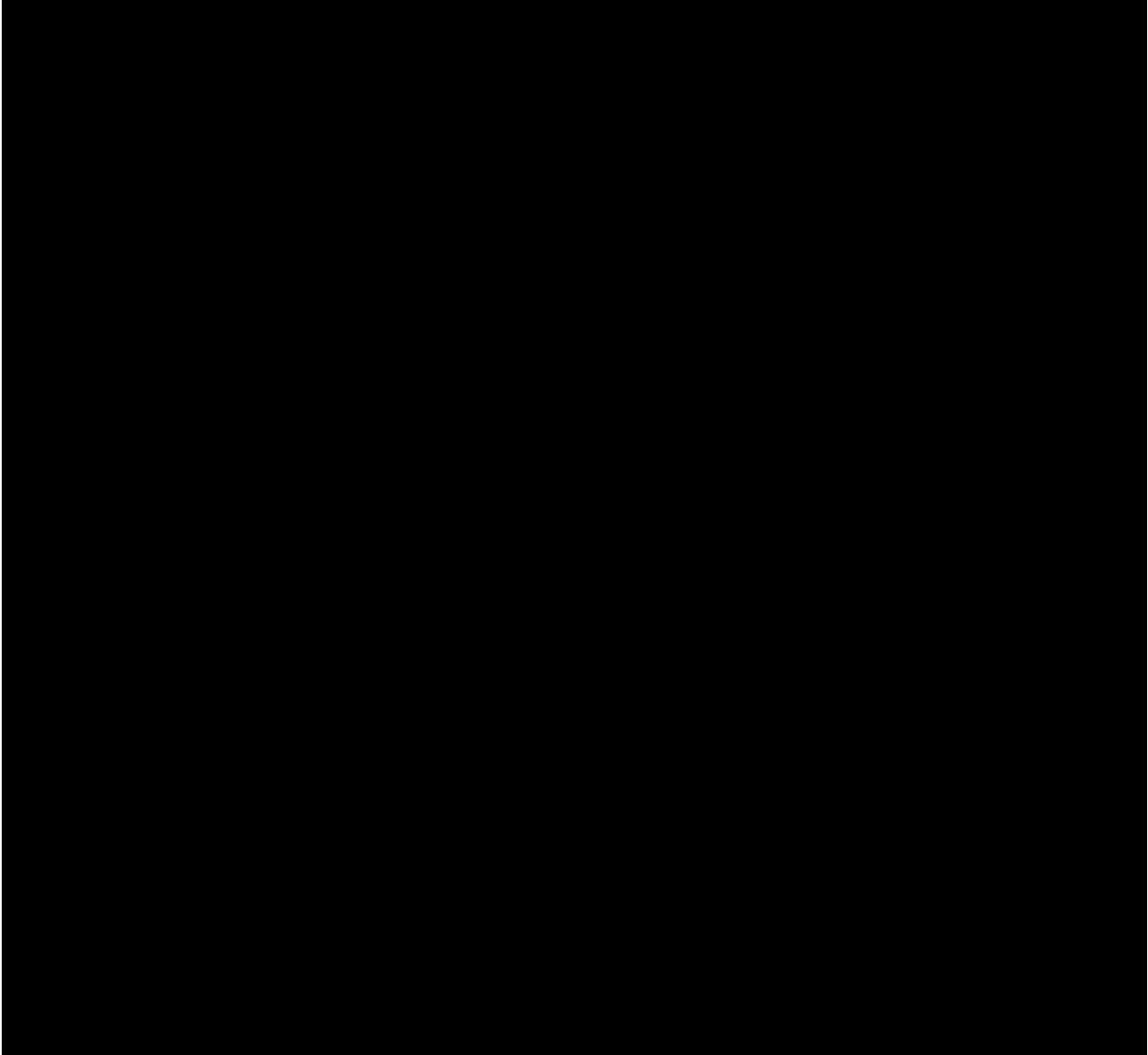


Discounts

If there are any discounts available for volume, multi-year commitments, enterprise wide licensing, etc. please make sure to clearly state those in your proposal.

Travel or Out-of-Pocket Cost

Describe how you propose to handle any travel or out-of-pocket expenses related to provisions of these services. Specifically address expenses for resources based in locations near Mason. As part of your offer (if travel reimbursement or travel fees/costs/expense are to be billed) your organization must agree to accept to be reimbursed in accordance with Mason’s per diem policies/requirements (GSA per diem rates). Please clearly outline any travel requirements/costs/expenses in your offer.





5

Additional Questions



5. Additional Questions

In your proposal response please address the following:

a. Current Litigation

a. Are you and/or your subcontractor currently involved in litigation with any party?

b. Investigations

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. Lawsuits

c Please list all lawsuits that involved your firm or any subcontractor in the last three years.

d. Name Change

d. In the past ten (10) years has your firm’s name changed? If so, please provide a reason for the change.



ATTACHMENT A
SMALL BUSINESS SUBCONTRACTING PLAN
TO BE COMPLETED BY OFFEROR

Offerors must advise any portion of this contract that will be subcontracted. 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: Accenture LLP

Preparer Name: Accenture LLP **Date:** April 28, 2023

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

Subcontract #2



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

Subcontract #3

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

Subcontract #4

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

Subcontract #5

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

Legal disclaimer

This document is proprietary and confidential to Accenture. It is supplied in confidence and, except for George Mason University evaluation purposes, cannot be disclosed, duplicated, or otherwise used in whole or in part without the prior written consent of Accenture.

The content of this document is subject to formal contract negotiations. Nothing in this document shall form the basis for any contract, and nothing contained in this document will be binding against Accenture unless expressly agreed to by Accenture under a formal contract. All representations and warranties, whether express or implied by statute, law, or otherwise, are hereby excluded.

Accenture interprets the following words and phrases used in the solicitation and this proposal in the manner indicated: “maximize,” “optimize,” and “optimal” mean to improve to a commercially reasonable degree; “minimize” means to reduce to a commercially reasonable degree; “best” means leading or of a high standard; “partner” and “partnerships” do not mean a legal partnership, but rather a collaborative relationship; “right,” where used as an adjective, means appropriate; and “ensure” and “enable” mean to use commercially reasonable efforts to implement.

This document was prepared on the instructions and information given by George Mason University and, accordingly, no responsibility is accepted for any inaccuracy or error, or any action taken or not taken in reliance on this document.

These limitations are not in any way intended to restrict continuing business discussions between George Mason University and Accenture.