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**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](mailto:glymas@gmu.edu)  
**SECONDARY PROCUREMENT OFFICER:** James F. Russell, Director, [jrussell@gmu.edu](mailto: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.

**TABLE OF CONTENTS**  
**GMU-1859-23**

<b><u>SECTION</u></b>	<b><u>DESCRIPTION</u></b>	<b><u>PAGE</u></b>
<b>I.</b>	PURPOSE	3
<b>II.</b>	PURCHASING MANUAL/GOVERNING RULES	3
<b>III.</b>	COMMUNICATION	3
<b>IV.</b>	FINAL CONTRACT	3
<b>V.</b>	ADDITIONAL USERS	3
<b>VI.</b>	eVA BUSINESS-TO-GOVERNMENT VENDOR REGISTRATION	4
<b>VII.</b>	SWaM CERTIFICATION	4
<b>VIII.</b>	SMALL BUSINESS SUBCONTRACTING PLAN	4
<b>IX.</b>	PERIOD OF PERFORMANCE	4
<b>X.</b>	BACKGROUND	4
<b>XI.</b>	STATEMENT OF NEEDS	4
<b>XII.</b>	COST OF SERVICES	5
<b>XIII.</b>	PROPOSAL PREPARATION AND SUBMISSION REQUIREMENTS	5
<b>XIV.</b>	INITIAL EVALUATION CRITERIA AND SUBSEQUENT AWARD	8
<b>XV.</b>	CONTRACT ADMINISTRATION	9
<b>XVI.</b>	PAYMENT TERMS/METHOD OF PAYMENT	9
<b>XVII.</b>	SOLICITATION TERMS AND CONDITIONS	10
<b>XVIII.</b>	RFP SCHEDULE	11
<b>XIX.</b>	ARCHITECTURAL STANDARD REVIEW BOARD REQUIREMENT	11
<b>ATTACHMENT A</b>	SMALL BUSINESS SUBCONTRACTING PLAN	13
<b>ATTACHMENT B</b>	SAMPLE CONTRACT	15
<b>ATTACHMENT C</b>	DATA SECURITY ADDENDUM	28
<b>APPENDIX A</b>	STATEMENT OF WORK	31

- 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](http://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:

	<b><u>Description of Criteria</u></b>	<b><u>Maximum Point Value</u></b>
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](mailto: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 10<sup>th</sup> 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 20<sup>th</sup> 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](mailto: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](http://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](mailto: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](mailto: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](http://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

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

\_\_\_\_\_  
Signature

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

# Appendix A

## Student Lifecycle Transformation

### Statement of Work

### Table of Contents

1.	Introduction .....	32
2.	Background.....	33
3.	Executive Overview .....	33
4.	Assessment Findings .....	35
5.	High Level Needs and Requirements .....	37
6.	Program Scope, Illustrative Phases and Tentative Timeline .....	38
6.1.	Program Scope: .....	38
6.2.	Illustrative Phases .....	38
6.3.	Tentative Timeline .....	39
7.	Design, Development, and Implementation (DDI) .....	40
7.1.	SDLC Approach .....	40
7.2.	SDLC Deliverables .....	40
7.3.	Planning .....	42
7.4.	Requirements Management.....	43
7.5.	Design and Development .....	43
7.6.	Testing .....	45
7.7.	Data Conversion and Migration.....	46
7.8.	Implementation .....	47
8.	Organizational Change Management (OCM) and Training .....	50
8.1.	Organizational Change Management Requirement.....	50
8.2.	Organizational Readiness Assessment.....	50
8.3.	Stakeholder Visioning and Touch Point Engagement.....	50
8.4.	Stakeholder Identification and Sponsorship Assessment.....	50
8.5.	Change Management Plan.....	51
8.6.	Marketing and Communications .....	51
8.7.	Training .....	52
9.	Post Implementation Hypercare .....	56
9.1.	Knowledge Transfer.....	56
10.	Project Management .....	57
10.1.	Mason Project Governance and Management.....	57
10.2.	PMO Project Governance and Management .....	57
10.3.	Overview of Contractor's Project Management Responsibilities .....	58
10.4.	Project Management Plan .....	58
10.5.	Project Schedule .....	59
10.6.	Deliverable Review and Acceptance .....	59
10.7.	Program Change Management .....	60
10.8.	Meeting and Reports Requirements .....	60
10.9.	Communications.....	61
11.	Staffing .....	62
11.1.	Staffing .....	62
11.2.	Vital Positions .....	63
11.3.	Additional Staffing Requirements .....	66
12.	Appendix .....	67
12.1.	Lifecycle/Undergrad Admission Org.....	67
12.2.	Graduate Admission Org.....	67
12.3.	Business School Org.....	67
12.4.	System Inventory.....	69
12.5.	Mason System Landscape.....	70
12.6.	Current Undergraduate Student Success Technology Solution (Navigate).....	70
12.7.	Mason Navigate User Totals by Role.....	72
12.8.	Mason Constituent List.....	72
12.9.	Mason Strategic Salesforce Use Cases: Current Capability .....	73
12.10.	Mason Strategic Salesforce Use Cases: Potential Expected Future State Capabilities.....	75

## 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.

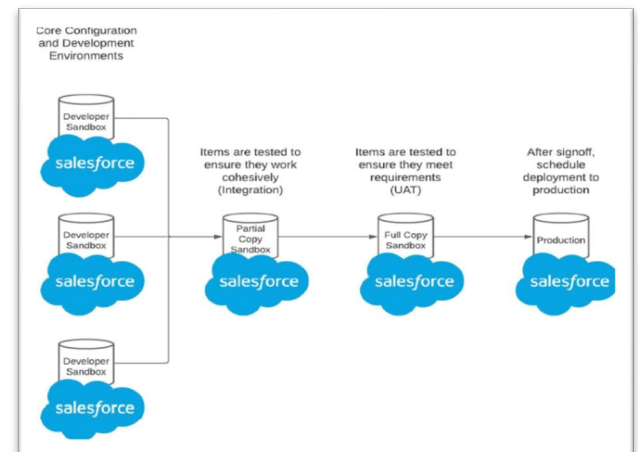
The outcomes for the engagement defined the below implementation recommendations:

- 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

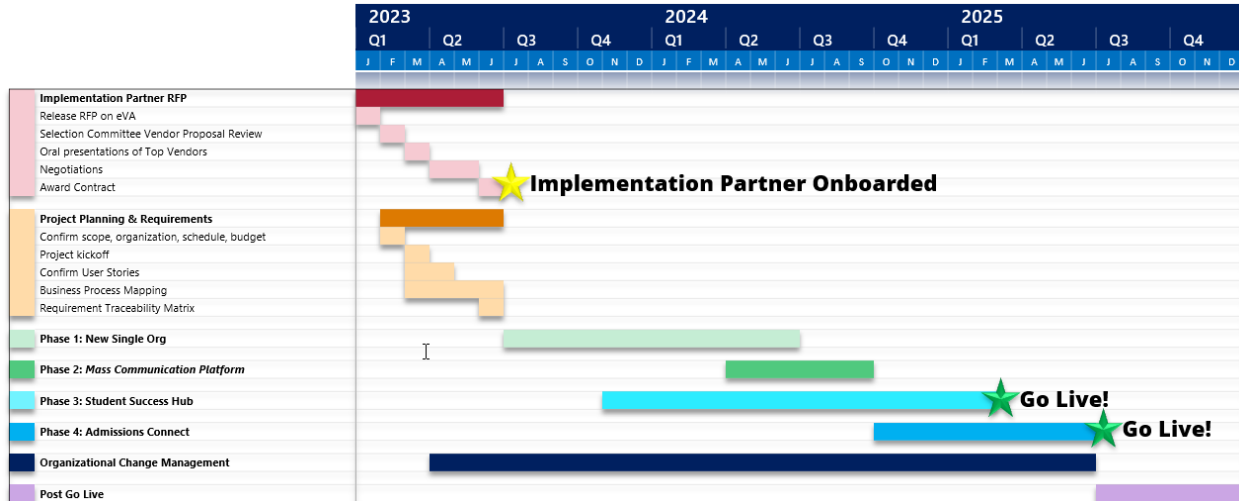
### 5.1. Program Scope:

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

<b>Phase</b>	<b>Description</b>
<b>Phase 1:</b>	<b><i>Build (refactor) into a new Single Lifecycle Org</i></b> Students included; Undergrad, Graduate, Business School <ul style="list-style-type: none"> <li>Business School Coaching and Advising functions will move into single Lifecycle org</li> <li>Remaining Business School org functions, need confirmation on their transition</li> </ul>
<b>Phase 2:</b>	<b><i>Implement Mass Communication Platform (ie. Marketing Cloud or another tool as recommended by vendor)</i></b>
<b>Phase 3:</b>	<b><i>Implement Student Success Hub</i></b> 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"> <li>Business requirement mapping and review, including current business process and gap analysis for ideal state</li> <li>Build Mason's SSH interface with current and enhanced functionality</li> <li>Pilot: representative sample of cross-functional users <ul style="list-style-type: none"> <li>With small group</li> <li>Debug</li> <li>Need User/Role matrix defined</li> </ul> </li> <li>Transition all existing Navigate Users</li> <li>Build out additional needed functionality and bring in additional user groups</li> <li>Embedded throughout should be training and onboarding resource development for users</li> <li>Self-service, in-application guidance for standard tasks will be required to supplement initial onboarding</li> </ul>
<b>Phase 4:</b>	<b><i>Implement Admissions Connect</i></b> 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"> <li>Have the ability to host multiple applications with varying deadlines;</li> <li>Support real/near-real-time integration with Mason's SIS</li> <li>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;</li> <li>Sync with the communications and marketing tool to permit multi-channel marketing based on data housed within the specific application object(s);</li> <li>Support multiple user types.</li> </ul>

### 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
<b>1. Planning</b>	Project Schedule *	Discovery
	Requirements Confirmation Document	Discovery
<b>2. Requirements Management</b>	Requirements Document(s) *	Discovery
	Requirements Traceability Plan and Matrix (RTM) *	Discovery
<b>3. Design and Development</b>	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
<b>4. Testing</b>	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
<b>4. Data Conversion and Migration</b>	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
<b>5. Implementation</b>	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
<b>6. Post-Implementation Support</b>	Formal System Acceptance Report	Implementation
	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
<b>Project Executive/ Director</b>	Directs project oversight, liaises with Mason and various other Mason stakeholders, and addresses escalated issues.	<ul style="list-style-type: none"> <li>5+ years of experience in IT project management of large-scale Higher Ed system implementation projects</li> </ul>
<b>Project Manager</b>	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"> <li>10+ years of experience in IT project management of large-scale system implementation projects.</li> <li>Experience with agile development methodologies.</li> <li>PMP, SCRUM Master preferred</li> </ul>
<b>Functional Lead</b>	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"> <li>5+ years of experience managing functional teams in Higher Ed</li> </ul> <p><b>OR</b></p> <ul style="list-style-type: none"> <li>3+ years of experience managing functional teams for large-scale system implementation projects.</li> </ul>
<b>Technical Lead</b>	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"> <li>5+ years of increasing/progressive levels of experience managing technical teams for large-scale system implementation projects using agile development methodologies.</li> <li>Experience with Higher Ed system implementation projects or industry-leading certification preferred.</li> <li>Versed in continuous integration (CI) and continuous delivery (CD) methods.</li> </ul>
<b>Infrastructure Lead</b>	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"> <li>5+ years of experience managing infrastructure teams for large-scale system implementation projects.</li> </ul>
<b>Implementation Lead</b>	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"> <li>5+ years of experience managing functional teams in Higher Ed</li> <li>3+ years of experience managing functional teams for large-scale system implementation projects.</li> </ul>

Role	Responsibility	Experience
<b>Training/On-site Support Lead</b>	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"> <li>5+ years of experience managing training and on-site support efforts for Higher Ed systems, as well as large scale system implementation projects</li> </ul>
<b>Organizational Change Management Lead</b>	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"> <li>5+ years of experience leading OCM efforts in large scale system implementation projects.</li> <li>Deep understanding of OCM methodologies and application in disparate organizations</li> <li>Certified ADKAR Prosci preferred</li> </ul>
<b>Communications &amp; Marketing Lead</b>	Develops and manages the program's communications and marketing strategy.	<ul style="list-style-type: none"> <li>5+ years of experience developing and leading marketing and communications efforts</li> <li>Experience developing and implementing communications strategies and public awareness campaigns</li> <li>Experience utilizing email marketing software and website content management tools like WordPress and Drupal</li> </ul>
<b>Data and Conversion Lead</b>	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"> <li>5+ years of experience in design, development, and administration of complex databases as well as lead roles in multiple complex database conversions.</li> <li>Extensive experience with advanced SQL scripting, and proficiency with LINUX command line and shell scripting required.</li> </ul>
<b>Testing Lead</b>	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"> <li>3+ years of experience in system testing and defect management for large-scale system implementation projects, preferably using an agile approach.</li> <li>Versed in continuous integration (CI) and continuous delivery (CD) methods.</li> </ul>

Role	Responsibility	Experience
<b>Integration/ Interoperability Lead</b>	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"> <li>• 5+ years of increasing/progressive levels of responsibility leading integration and interoperability development in large-scale system implementation projects.</li> <li>• Experience with Higher Ed system implementation projects and/or industry leading certification preferred.</li> </ul>
<b>Chief Architect</b>	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"> <li>• 5+ years of increasing/progressive levels of responsibility architecting large scale system implementation projects.</li> <li>• Experience with Higher Ed system implementation projects and/or industry leading certification preferred.</li> </ul>
<b>Security Lead</b>	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"> <li>• Compliance with federal requirements, policies, and procedures regarding privacy</li> <li>• Protection of confidential data and information</li> <li>• Security testing during development and resolution of any findings</li> <li>• Security is architected directly into the application and features</li> </ul>	<ul style="list-style-type: none"> <li>• 5+ years of experience in integrating security standards and features within complex systems containing confidential information.</li> <li>• Experience with System Assessment and Authorization (SA&amp;A) or CISSP, CISM, or equivalent certification preferred.</li> </ul>

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

### 11.2. Graduate Admission Org

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

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

### 11.3. Business School Org

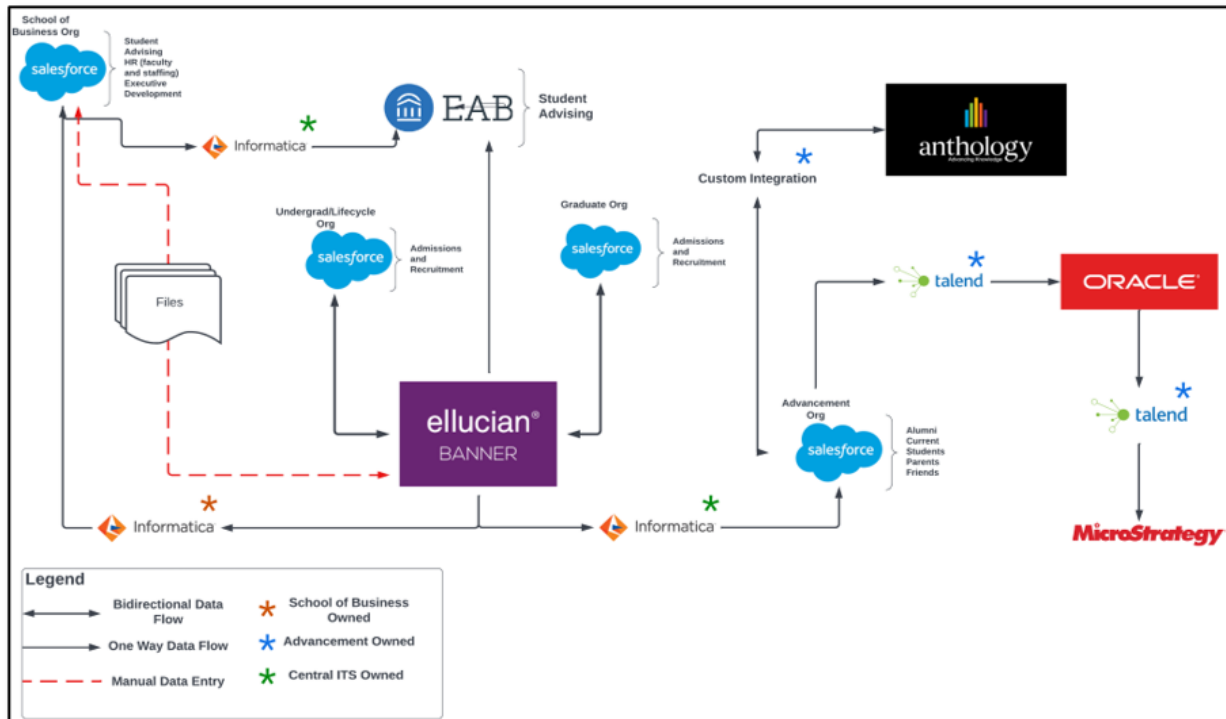
Storage & Usage	Full Sandbox <ul style="list-style-type: none"> <li>Enterprise Edition</li> <li>71% Data Utilization</li> <li>6% File Utilization</li> <li>100% License Utilization (Full SF )</li> </ul>	MyDomain: MasonBus <ul style="list-style-type: none"> <li>52 % - Individual Email Results (Fluctuates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



## 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		
Stellic (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
<b>TOTAL</b>	<b>195,867</b>

### 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								

[illegible]

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	

[illegible]