

## Memorandum

October 18, 2012

**Date:** October 18, 2012

**To:** *Funding and Resources Working Group Members:*

Marc Broderick, Chair	David Moore
James Hazel	Leonidas Mourelatos
Mark Houck	Steven Mullins
Daniel Houser	William Reeder
Betty Jolly	Joseph Rosenberger
Paul Liberty	Matthew Short
Timothy Meyers	Lisa Sturtevant

**From:** President Ángel Cabrera and Professor Sarah Nutter, Presidential Fellow

**Subject:** Your Working Group's Charge for Strategic Visioning Process

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Thank you for agreeing to join this important Working Group to help shape the ideas and priorities for our new strategic Vision and to position the University for the future. Your work will be instrumental in crafting our new Vision and will also provide important input to the strategic planning process that we will embark on next year.

### **The Context for Your Work**

As you know, we have embarked on this strategic visioning process to clarify who we are and guide our future. Our new Vision will include a concise and memorable mission statement, a set of values describing the “The Mason Way” of doing things, a profile of the attributes we wish all of our graduates to share (“The Mason Graduate”), as well as a set of our shared commitments for the next decade. This new Vision and the supporting materials we develop through this process will be the foundation for our next strategic plan and our new comprehensive capital campaign. We will present the Vision document to the board in March 2013 for their approval and immediately thereafter begin the strategic planning process. This is an exciting time for the University and a great opportunity to get all of our constituents united behind a powerful and distinctive Vision for Mason.

The Funding and Resources Working Group will be responsible for a critical component of this strategic visioning work— *evaluating our current sources of funding, assessing best practices, and exploring ways to maximize our brand and social capital*. In your analysis, you will consider key issues facing higher education at large and Mason in particular and assess Mason's competitive advantage in this area. Ultimately, we will ask you to draft a report summarizing your work and suggesting possible Mason commitments in this important area. The commitments made by each group will be synthesized by the Steering Committee to focus on the themes that arise across Working Groups making your work integral to the Vision document and the strategy work itself.

## **The Structure of the Work**

Your group, chaired by Marc Broderick, Vice President of University Development, is expected to meet regularly through the end of the semester to accomplish its tasks and draft your report. You will be asked to consider the following questions as part of this topic:

1. What are the current trends in higher education fundraising and how do we compare to other institutions?
2. How can we best partner with business, state and federal government, and local constituencies to generate new resources?
3. How can we best communicate our value to Virginia's elected leaders to ensure adequate funding?
4. How can we make a compelling case for private support from current and future stake holders (alumni, parents, community leaders, and business leaders, local/national foundations)?
5. What are best practices that we or other universities engage in to build their social capital? What could we do?
6. What are the current strengths and weaknesses of our brand? How does brand affect the ability to raise funds?
7. What are possible non-philanthropic, non-tuition, and non-state generated resources that we might pursue?

The group will work to gather input from a variety of sources—external and internal data sources, and from the community at large—faculty, staff, students, and alumni -- to answer these questions, determine Mason's competitive advantage, and suggest possible commitment(s). Some of the ways you should consider gathering data from the community include:

- Review of relevant internal and external data and reports
- Focus groups with faculty, staff, and students
- Interviews with key individuals inside and outside the university
- Discussions at departmental, school, faculty and student governance meetings
- A “town hall” meeting with specific constituent groups to get input on these questions
- Online discussions

You will be supported in your work by our Project Manager, Carrie Klein (email: [cklein7@gmu.edu](mailto:cklein7@gmu.edu), phone: 703-993-5399).

## **Timeline**

The Steering Committee will collect all the Working Group inputs before the start of the spring semester, then work to incorporate them into our Vision document. These will be shared back out with the community in February for additional input and reactions, then revised and prepared for the board. We recommend that you think of your work in terms of five brief phases:

1. Clarifying the questions you need to answer
2. Gathering internal and external data and reports
3. Reaching out to engage the community on this issue
4. Consolidating your inputs
5. Drafting your final report and proposed commitment(s)

We want to thank you in advance for your work and for taking on this responsibility on top of an already busy semester. We know that your engagement with the topic and your outreach to the community will be of immense value for the task we have at hand.

### **Format and Outline for your report**

The format of your report will include a 1-page executive summary, which will highlight the key insights from your analysis, the Mason competitive advantage in your area, and proposed Mason commitment(s). The remainder of the report will provide supporting description and analysis related to each key issue, including a discussion of potential trade-offs and/or critical success factors involved in the pursuit of your proposed commitments. In addition, you are welcome to briefly raise any issues that were not addressed or do not have the same immediacy as your key issues but should not be overlooked in the strategic planning process.

The report should not exceed 20 pages, excluding appendices. Please format your document to be single-spaced, with double-space between paragraphs, 12-point Times New Roman font, 1-inch margins, and a footer that indicates your Working Group and page number.

Please use the following outline for your report:

- 1) Executive Summary—including key insights, Mason’s competitive advantage, and proposed commitments.
- 2) Key Issues – for each issue identified
  - a) Issue XX
    - i) Issue analysis that includes a brief description of the key issue facing higher education at large and Mason in particular
    - ii) Mason’s competitive advantage in this area
    - iii) Trade-offs and/or Critical Success Factors
    - iv) Proposed commitment - a broad statement that describes what Mason could achieve in this area.
- 3) Additional issues to consider going forward that are beyond scope of this vision process
- 4) References
- 5) Appendices

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