

Vice President for Resource Development

The philanthropic generosity of individuals, corporations, and foundations has been a key element in MIT's rise to world leadership in education and research. During the past year, the Office of Resource Development (RD) continued to build an enhanced fundraising organization capable of expanding the flow of private support to MIT over the next five to seven years through a comprehensive fundraising campaign. Results in FY2015 are as follows:

- Cash gifts and the fair market value of non-cash gifts totaled \$449.6 million
- New gifts and pledges totaled \$574.8 million, up \$117.3 million from last year, making this the highest year on record.

New gifts comprise cash and the fair market value of non-cash gifts received in full during the year, while pledges may be paid over the course of more than one year. Cash gifts and the fair market value of non-cash gifts for FY2015 compare with:

- \$380.9 million in 2014
- \$420.1 million in 2013
- \$385.9 million in 2012
- \$548.9 million in 2011

These achievements have been realized through the active partnership of faculty, administrators, and volunteers in the critically important work of institutional development. Of particular note in the past year is the announcement of the May 2016 public launch of a campaign aimed at generating \$4 to \$5 billion in private support, organized around the Institute's core needs for People, Place, and Purpose. In support of People, expected levels have been increased for establishing endowed funds for professorships, scholarships, and fellowships; in support of Place, capital naming opportunities have been established for the Nanotechnology Building, Walker Memorial, the Main Group, and Buildings 2 and 66; and in support of Purpose, opportunities are available through the Innovation Initiative, the Future of Education, and Humanity's Greatest Challenges in food, water, and basic research. To date we have raised \$2.4 billion, or 48% of the goal.

I have enjoyed my first year at MIT and look forward to leading the office of Resource Development to greater achievements in support of the Institute.

Julie A. Lucas
Vice President

Office of Philanthropic Partnerships

The Office of Philanthropic Partnerships (OPP) coordinates and leads MIT's principal gifts program. The office, which includes the Philanthropic Advising Team (domestic prospects) and the Office of Global Initiatives (international prospects), nurtures the Institute's relationships with its most generous individual donors, and cultivates and

engages potential donors from around the globe who have the capacity to contribute \$5 million or more.

OPP ensures that the Institute's relationships with top donors are managed thoughtfully, with care and coordination with many Institute partners. Among its responsibilities, OPP develops and manages President and Mrs. Reif's Resource Development travel, calendar, and strategy for select donor meetings; manages the MIT Corporation Partners Program; works closely with colleagues to identify new MIT Corporation members and Institute volunteers; and coordinates the ongoing 1-rated donor and prospect strategy discussions with colleagues from across the Institute.

During FY2015, OPP focused on preparing President Reif, Chairman Millard, and Chancellor Grimson for discussions with key principal gift prospects and expanding Institute-wide collaborative efforts at this giving level. Of special focus this year was the identification of opportunities to align Institute priorities with the interests of ultra-high net worth unaffiliated (non-alumni) individuals. Efforts included organizing a series of presidential dinners and visits with top donors; collaborating on content development for the Charter Society dinner, which recognizes all families who have given \$1 million or more to MIT in lifetime giving; coordinating outreach to top prospects for invitation to the Solve event; and facilitating transformational gift strategies around capital projects including MIT.nano, the Innovation Initiative, and the Institute for Medical Engineering and Science. In its ongoing role as development advisor to the MIT Energy Initiative, OPP counseled MITEI on the expansion of its External Advisory Board. OPP also worked with Bethany Millard in her role as chair of the Corporation Partners Program, and met monthly with Christine Reif to further engage her with key prospects and their spouses.

Internationally, OPP celebrated one of the largest gifts ever to the Institute (\$118M) from an alumna based in London. In addition, less than two years after prioritizing the largely untapped region of Latin America as a new area of focus, OPP closed a \$25 million gift from an unaffiliated donor in Mexico. In conjunction with Institute Events and other departments across campus, OPP planned and executed the unprecedented trip to Singapore and Hong Kong by the MIT Corporation Executive Committee and a delegation of senior leaders. OPP coordinated MIT's participation in the 2015 World Economic Forum annual meeting in Davos, Switzerland, bringing the Institute's work on solving the global crises of water and food to an international audience, and establishing and advancing connections with prospective individual donors. In collaboration with the Office of the Arts and the List Visual Arts Center, OPP coordinated a trip to Venice by President Reif and a delegation from the Institute to celebrate artist and MIT Professor Emerita Joan Jonas representing the U.S. at the 56th Venice Biennale. With a continued focus on identifying and engaging unaffiliated billionaires worldwide, including in the newly prioritized Middle East/North Africa/Turkey (MENAT) region, OPP had 38 introductory meetings with international ultra-high net worth individuals.

In collaboration with colleagues, faculty, and Institute leaders, OPP achieved the following results in FY2015:

- Of the total FY2015 new gifts and pledges of \$273,542,953, eight gifts were of \$5 million or more, totaling \$221.5 million.
- Seven presidential trips for Resource Development (two domestic and five international). Please note: 1 of the international trips spanned two fiscal years.
- 157 individual presidential prospect and donor meetings and events (74 domestic, 83 international).
- Completed 676 donor, prospect, and foundation meetings and phone calls.

Arundhati (Tuli) Banerjee
Senior Director, Global Initiatives

Richard MacMillan
Senior Director, Philanthropic Advising

Office of Leadership Giving

The Office of Leadership Giving (OLG) cultivates and stewards individual alumni and friends capable of making gifts primarily in the range of \$100,000 to \$5 million. OLG works with other offices in Resource Development, the MIT Alumni Association, the Office of the President, and the Office of the Chairman of the Corporation, as well as deans, department heads, and volunteers from across the country. OLG staffs a large number of one-on-one visits between senior Institute leaders and important alumni and parent prospects and donors.

In this final year before the public launch of the campaign, OLG continued to focus on the key processes and policies that drive our success. By defining prospect plans and strategy, executing a robust series of events, and prioritizing senior officer visits, the team solidified a strong MIT presence in major regions across the country. Particular attention was paid to Corporation Development Committee members through staff attendance at regional CDC meetings. Staff member Bridget Fantini now spends 50% of her time supporting the development efforts of Chairman Millard.

Professional development and training to sharpen fundraising skills and content expertise remained a top priority during FY2015, and low turnover in frontline fundraising staff was critical to the team's success in the past year. Although we will deeply miss Executive Director Michael McNally, who departed for another assignment during the year, his legacy at MIT is a strong major gifts fundraising team with a foundation of systems, processes, and skills to meet the challenge of the campaign and beyond. We are thrilled to welcome Maggie Brown as our new Parents IGO and the impending hires of a Metro NYC IGO and Northern California/Northwest IGO to activate qualification activity on the ballooning numbers of identified prospects in those regions.

In FY2015, OLG officers raised \$71.2 million in new gifts and pledges, 110% of a fiscal year goal of \$65 million and against a \$ 41.9 million average annual run rate for the past

four fiscal years. The 28% increase year over year, or 70% increase over the four-year run rate, is noteworthy. Of the 2,346 visits that took place with alumni, parents, and friends, 453 were categorized as “qualification” visits (meaning first-time conversations with newly identified alumni, parents, or friends of the Institute).

Overall, OLG exceeded its dollar goal by retaining a focus on quality in the execution of purposeful visits, events, and solicitations. Through Resource Development’s “core team” development approach, OLG strengthened collaborations with the Leadership, Annual Giving, and Reunion teams in the Alumni Association, staff in the Campaign Office and other units of Resource Development, as well as development staff in the schools and DLCs across the Institute.

Highlights from FY2015 include:

- The OLG fundraising total of \$71.2 million in new gifts and new pledges represents 13% of MIT’s FY2015 gift total (a 1% increase in share from FY14), and \$3 million raised per fundraising officer in OLG (\$1.8 million per staff person on the team); these totals are up 25% and 29% respectively from the previous fiscal year.
- By the end of FY2015, there were 3,778 managed prospects, an increase of 3% over the prior fiscal year.
- 2,346 visits were orchestrated with OLG staff involvement; 453 were “qualification” visits.
- OLG also spearheaded 51 events targeting key segments of alumni and parent populations. The events featured senior officers including President Reif; Chancellor for Academic Achievement W. Eric Grimson; Chancellor Cynthia Barnhart; MIT Corporation Chairman Robert Millard; Vice President for Research Maria T. Zuber; Kenan Sahin Dean of the School of Humanities, Arts, and Social Sciences Deborah K. Fitzgerald; Dean of the School of Architecture and Planning Adèle Naudé Santos; Dean of the School of Science Michael Sipser; and Dean of the School of Engineering Ian C. Waitz. Other participants included Sanjay Sarma, Fred Fort Flowers and Daniel Fort Flowers Professor of Mechanical Engineering; Peter H. Fisher, professor of physics; Bengt Holstrom, Paul A. Samuelson Professor of Economics; James DiCarlo, Peter de Flores Professor Neuroscience; Linda G. Griffith, professor of biological engineering and mechanical engineering; Richard Lester, professor of nuclear science and engineering; Donald R. Sadoway, John F. Elliott Professor of Materials Chemistry; James Poterba, professor of economics; Whitney Newey, Jane Berkowitz Carlton and Dennis William Carlton Professor of Microeconomics; John Winston Belcher, Class of 1922 Professor of Physics; and Arup K. Chakraborty, Robert T. Haslam Professor of Engineering. Additional participants included Munther A. Dahleh, William A. Coolidge Professor of Electrical Engineering and Computer Science; Christopher A. Schuh, Danae and Vasilios Salapatas Professor Metallurgy; Joel Schindall, Bernard Gordon Professor of the Practice, Electrical Engineering and Computer Science; Anantha P. Chandrakasan, Vannevar Bush Professor of

Electrical Engineering and Computer Science; Vladimir Bulović, Fariborz Maseeh Professor of Emerging Technology and Associate Dean of Innovation; and Fiona Murray, Associate Dean of Innovation and William Porter (1967) Professor of Entrepreneurship. Other senior officer participants included Julie Soriero, director of the Department of Athletics, Physical Education, and Recreation; Philip S. Khoury, Ford International Professor of History and associate provost; and Seth Alexander, president of the MIT Investment Management Company.

- Non-alumni parent giving effectively held steady at \$2.9 million (capped dollars). This was during a year of transition for the FTE in major gift parent fundraising who transitioned to the Campaign Office.
- OLG again hosted the highly successful Campus Visit program “Here.Now. Next.” and participated in MIT Charter Society top donor stewardship events on campus and in New York City. OLG continues its East and West Coast Technology Breakfast series and launched an inaugural West Coast Scholarship Brunch.

With a continued focus on effective annual planning, and with the integration of School Development Deans in FY2015, we are hopeful for another excellent year ahead in FY2016.

Katie McDonnell
Interim Co-Director

Christina Toro
Interim Co-Director

Office of Gift Planning

The Office of Gift Planning (OGP) engages donors in estate planning conversations involving gifts of complex assets, as well as life-income gifts, including charitable remainder trusts, charitable gift annuities, and pooled income funds. OGP also works with donors and their advisors on structuring testamentary gifts through wills, living trusts, and designations in a qualified retirement plan. OGP provides support to the work of the Office of Leadership Giving (OLG) and the Office of Principal Gifts (OPP) frontline staff in Resource Development; the Annual Fund in the MIT Alumni Association; the five schools; and departments, centers, institutes, and various arts organizations throughout the MIT campus.

During FY2015, OGP focused efforts on hiring to fill a number of frontline positions, and we look forward to the leadership of a new Director of Gift Planning early in FY2016. OGP staff continued to deepen partnership and gift collaborations with colleagues across MIT through further integration in gift discussions, participation in strategic discussions regarding donor solicitations, and reengagement with fundraising staff in the Sloan School of Management.

During the year, OGP significantly expanded its marketing efforts through a number of vehicles, including distribution of a calendar year-end charitable gift annuity mailing,

production of a bequest brochure in conjunction with RD Communications, and the development of an online Planned Giving calculator in conjunction with the RD-IT team. OGP worked with the Recording Secretary's Office to develop a Gift Procedures Manual, and offered training sessions for frontline colleagues across the Institute as well as Annual Fund and Corporation Development Committee volunteers.

Life-income gifts and estate gifts provide funding for scholarships, fellowships, research, professorships, the MIT Libraries, and the Institute's unrestricted needs. In FY2015, OGP established over \$17.3 million in new life-income gifts, and the Institute realized over \$13.3 million in probated estate gifts.

Barbara E. Pitts

Executive Director, Office of Gift Planning, and Senior Philanthropic Advisor

Campaign Office

The Campaign Office provides structure, coordination, and accountability to senior management, academic leadership, benefactors, and lead volunteers across MIT. The office has made significant progress this year to clarify fundraising priorities and further develop the themes and major initiatives within the campaign.

Specific accomplishments include: launching a capital project gift opportunities tracker on the Campaign Toolkit website; development of the strategy and overseeing the cultivation and solicitation of prospects for MIT.nano and the Innovation Initiative; formation of a working group to develop recommendations to increase unrestricted giving; and direct support of stewardship efforts for several of the Institute's most generous donors. Campaign staff participation on the Institute's Committee on Resources for Institute Space Planning greatly informed the communication and fundraising strategies for capital building projects. The analytics team leveraged visualization technologies to provide analysis and support strategic fundraising discussions with Institute leaders.

The Corporation Development Committee (CDC)—the Institute's permanent standing volunteer fundraising organization—expanded regional membership and activity both domestically and abroad, holding regional meetings in New England, New York, Northern and Southern California, the Mid-Atlantic, Florida, the Midwest, Texas, and Latin America. The Campaign Volunteer Committee (CVC), which will provide theme leadership and regional infrastructure for major donors as well as counsel to the President on the evolving campaign message and approach, progressed through its early stages of formation.

The Prospect Identification, Research and Management group focused on campaign readiness by providing business intelligence and analysis about known donors and finding new prospective supporters for MIT through its three teams: Prospect Management, Prospect Identification, and Prospect Research. The teams provided training on prospect management tools and policies to new fundraising staff as well as monthly refresher training to existing staff, produced donor profiles and briefings for an

increased number of senior officer fundraising meetings, and identified, screened, rated, and prioritized both new and revived prospects to develop a robust pipeline for the fundraisers.

Specific accomplishments of the Prospect Research, ID and Management group included refinement by the research team of the format of the donor profile for senior officers to include a photograph, and streamlined background information. The prospect identification team exceeded its target number of new major gift prospects. The prospect management team created a process for tracking new development hires to provide them with training on prospect systems and policies, and helped launch, enforce, and periodically review the new prospect management policy to promote a systems-based process that ensures consistency in defining a prospect, his/her stage, and actions to be taken by the fundraiser. Overall, the Prospect Management, ID and Research team produced 1,258 research reports, a 4% increase from the prior year; performed 2,113 capacity evaluations on prospective donors, a 17% increase over FY14; identified 1,468 new major gift prospects, a 70% increase over the previous year; and processed 11,749 data entry requests.

David A. Woodruff

Associate Vice President and Chief Operating Officer

Office of Foundation Relations

The Office of Foundation Relations (OFR) engages private foundations to maximize support to the Institute from this sector. OFR staff works to identify foundation opportunities that are aligned with Institute initiatives, centers, programs, and projects, and develop strategies for successful approaches. To advance these efforts, OFR works in collaboration with other offices in Resource Development; school- and department-based development staff; the Offices of the President and other senior leaders; and faculty and program staff across the five schools. OFR also works closely with other units across campus including the Office of Corporate Relations; the Office of Sponsored Programs; the Office of the General Counsel; the Recording Secretary's Office; and the Technology Licensing Office. OFR staff members organize visits to campus by foundation representatives; staff senior officers in meetings with foundation heads; work closely with faculty and others to develop strategies and proposals; serve as relationship managers for a broad set of foundations, including developing and maintaining relationships with program officers; facilitate faculty-foundation interactions; steward foundation support; identify and engage new foundations; conduct research on foundation prospects; and keep current on trends in the field.

During FY2015, the office facilitated more than 150 meetings with foundation representatives, 33 involving senior officers or deans, and had its most successful year ever, surpassing the FY2014 year-end total during the third quarter of FY2015. Of the \$200.3 million in new gifts and pledges from foundations in FY2015, OFR staff was directly involved in securing 57 new awards, totaling \$51.2 million, or 25.5% of total foundation support to MIT. Of the OFR total, 11 new gifts or pledges were \$1million or above, for a total of \$39.2 million, and 27 new gifts or pledges were between \$100,000

and \$999,000, for a total of \$11.3 million. Also in FY2015, OFR developed and began to implement a new strategic plan, including an enhanced focus on international and corporate foundations. Finally, two new associate directors joined the team in FY2015.

New and continued foundation support was achieved during FY2015 with OFR involvement for a wide range of initiatives, labs, centers, school priorities, and faculty projects, including undergraduate scholarships, graduate fellowships, the Cybersecurity Policy Initiative, the Office of Digital Learning, the Abdul Latif Jameel Poverty Action Lab, the Media Lab, the Department of Materials Science and Engineering, the Department of Brain and Cognitive Sciences, the Department of Civil and Environmental Engineering, the Department of Physics, the Initiative on the Digital Economy, the Department of Economics, the Center for Civic Media, and the Center for Art, Science and Technology.

Lindley Huey

Executive Director, Foundation Relations

Communications and Events

The Office of Communications and Events supports Resource Development, MIT's five schools, and the President's Office in the important work of cultivating and engaging prospects through numerous vehicles, from broad messaging online and in print to highly tailored individual engagement strategies. With the arrival of our new Vice President Julie Lucas, planning for the campaign has come into much sharper focus, enabling the RD Communications team to play a larger role in developing campaign messaging, coordinating planning presentations, and overseeing writing and design for transformative donor proposals.

The Communications Office supported the Campaign through ongoing work on branding, launch planning, a review of MIT's digital capabilities, and general support of the Vice President Lucas, as she organized RD for the coming Campaign. The RD Communications team also joined the MIT Portal Project (later called the Connectivity Project), an Institute exploration with Blue State Digital to expand digital engagement with numerous constituencies around the world.

In addition to the above signature projects, the office maintained its ongoing support to clients within Resource Development and across the Institute, as well as its foundational work in producing campaign-focused communications. This includes production of printables and white papers on campaign themes and priorities; development of proposals for nine-figure gifts to the major campaign initiatives; a redesign and reorientation of Spectrum, MIT's development magazine for prospects, donors, faculty, and staff, so that it is now aligned with Campaign messaging; coordination of major announcements about gift agreements and campaign progress; art and editorial direction for presentations to senior leadership and the MIT Corporation; and writing of numerous summaries, proposals, news digests, brochures, analytic reports, articles, and creation of high-quality gifts for top prospects.

During FY2015, the Events team collaborated with partners across MIT to execute a variety of donor and prospect events around the world, most notably, but not limited to, a dinner and reception at the World Economic Forum in Davos, Switzerland; an historic presidential trip to Brazil; the biannual top donor MIT Charter Society gala; the twice-yearly Campus Visit Program; the Corporation Partners Program now hosted by Bethany Millard; and a series of Gray House dinners with presidential prospects. Beyond these signature events, the team collaborated with development officers to bring many rated donors together at key stewardship, cultivation, and gift-signing events across the country.

Toward the end of FY2015, RD leadership worked to reorganize the editorial team to hire expertise and skills that have been missing in the group and are needed to successfully support the Campaign.

Whitney Espich

Executive Director, Communications and Events

Donor Relations and Stewardship

The Donor Relations and Stewardship team supports Resource Development, MIT's five schools, and the President's Office by fostering the relationship between the Institute and its donors through activities that acknowledge, recognize, and report on gifts to MIT, and engage donors in the life of the Institute. The team honors donors' rights to timely and accurate information about the use of their gifts, and supports Resource Development's mission to maximize long-term gift support to MIT.

During FY2015, the team made strides in expanding the stewardship activities and information that MIT provides. Through a portfolio approach to our work, staff focused on stewarding assigned areas of giving, including: 1) People (scholarships, presidential fellowships, and centrally held professorships), 2) Place (named spaces, donor aspects of building/space dedications, building anniversaries), and 3) Purpose (key initiatives such as the Office of Digital Learning, MITEI, etc. and student life programs from DAPER and DUE to the Public Service Center). Other enhancements included implementing a more strategic and streamlined process for identifying donor stories to be featured in MIT publications; production of more top donor comprehensive stewardship reports; the addition of OCW Scholar videos for a set of transformational scholarship donors; staffing support and strategy for Emeritus Chairman John Reed's solicitation of Corporation members in the final year of the campaign nucleus fund; collaboration with academic departments to offer recommendations for visiting committee membership; and collaboration with the Communications team to develop printables and FAQs for endowment, scholarships, fellowships, and professorships.

Event work this year included the biannual top donor MIT Charter Society gala as well as a regional Charter Society program in New York City; the annual Scholarship/UROP brunch, which brings together student recipients and their benefactors in one of the most popular donor events we organize; the first scholarship event on the West Coast;

and participation in planning meetings and pitch presentations for the 2016 campaign launch.

Fund reporting continues to be an important annual effort. In FY2015, we produced and distributed approximately 1,600 annual endowment reports to donors. In the spring, more than 734 students were asked to send personal thank you notes to roughly 180 scholarship stewardees/donors; the student response rate was approximately 74%. In the preceding fall, more than 500 stewardees/donors received scholarship reports with information about scholarship beneficiaries. The team wrote and coordinated distribution of approximately 500 Presidential Acknowledgement letters. In addition, one team member participated in a cross-departmental working group from RD and the VP Finance Office to identify a framework for increasing relief to the General Institute Budget through the gift stream. This work resulted in the discovery of numerous funds that are candidates for release through donor discussions, departmental process changes, or application to Probate court. This work gained great momentum toward the end of the fiscal year and will continue into FY2016. Two other team members were recognized through the RD Rewards and Recognition program for their outstanding contributions to the work of RD through Donor Relations & Stewardship.

Kate Eastment

Executive Director, Stewardship and Donor Relations

Office of the Recording Secretary

The Office of the Recording Secretary (RSO) receives gifts on behalf of the Institute and provides expertise and consultation on gift policies and procedures. The office prepares tax receipts, deposits gifts, and provides the official recordkeeping of pledges and gifts of cash, securities, mutual funds, and gifts-in-kind. In addition, RSO ensures the maintenance, safekeeping, and accessibility of permanent records of gifts, including original documentation of gift memoranda, gift agreements, pledges, trust instruments, and other legal documents associated with gifts. The office has oversight of the approval, creation, and maintenance of all endowed funds and works with senior representatives of the Institute to formulate policy and implement established guidelines.

In FY2015, RSO and the Office of Gift Records of the MIT Alumni Association recorded 70,333 gift transactions, including new gifts and pledges, additions, and modifications. The total dollar volume of cash transactions processed in FY2015 (\$449,616,705) increased 19% from the cash dollar volume processed in FY2014 (\$373,915,237). RSO was responsible for transactions representing 97% of the cash revenue and 19% of the transactional volume. There was a 43% increase in revenue for domestic and international gifts made by wire, processed by the RSO. The revenue for gifts of securities, also processed by the RSO, increased by 9%, while the gifts by check revenue dropped from 36% to 28% of total revenue. The number of credit card transactions processed by the Alumni Association increased by 48%, with an increase in dollars of 11%.

The Gift Policy Committee (GPC), chaired by the Recording Secretary and composed of senior members of Resource Development, the Executive Vice President and Treasurer, the Office of the General Counsel, the Office of the Vice President of Finance, the Provost's Office, and the Office of Major Agreements, convened 6 times in FY2015. Gift acceptance principles were presented and approved by the committee. A process for review of Special Gifts was developed, documented, and shared with all fundraising staff. The GPC finalized an internal document to determine and properly classify gifts and various sponsored activities for their proper administration. In addition, a Gift Procedures Manual was drafted for planned publication early in FY2016.

Staff worked with the Office of International Agreements to review donor entities and tax issues for Asia. Work continued to evaluate corporate memberships across MIT to ensure that they are correctly categorized as gifts or fees. The RSO continued to partner with the MIT Audit Division, undertaking a review of a selection of gift funds and their spending across the Institute. Staff participated in a cross-departmental working group from RD and the VP Finance Office to identify a framework for increasing relief to the General Institute Budget through the gift stream. The Recording Secretary served on the International Coordinating Committee.

Beginning in FY2016, the Office of the Recording Secretary will report to the Office of the Executive Vice President and Treasurer, at the same time continuing a close working relationship with both Resource Development and the Alumni Association.

Elizabeth M. Ogar

Executive Director, Gift Administration, and Recording Secretary

Information Technology

The Resource Development–Information Technology (RD–IT) team provides technical management and maintenance of its central database and related systems, services, and support to the Resource Development staff, as well as significant services and support to other development organizations at MIT and constituencies requiring access to donor and alumni information. The Advance database is managed in partnership with the Alumni Association.

During FY2015, the RD–IT staff devoted significant effort to making important improvements to internal processes in preparation for the campaign. In addition to new software tools for project management and workflow, the department was re-organized into functional groups to create area disciplines to enhance specialization and create redundancy, improve project management, and allow for a more nimble customer-centered prioritization of work with an emphasis on communication. The group also reviewed and overhauled much of the infrastructure that supports critical business systems to ensure they are scaled, configured and secured properly for the coming campaign activities.

The group developed and refined key campaign deliverables, including the Pipeline Report, Path to \$500M, Prospect Strategy Report, Top Donors, Top Prospects, and

Corporation Giving Reports. Significant progress was made on multiple campaign-specific projects as well. Highlights include creating a process and workflow for Bequest Expectancy, Named Spaces, and Funding Opportunities tracking; release of new Prospect Management web forms; development of Campaign “tagging” for reporting purposes; development of campaign dashboards and management reports; enhancements to the Senior Officer confidential briefs; development of the UK Trust gift acceptance website; and many other internal tasks to integrate campaign priorities, opportunities, commitments, and transactions into the Advance database.

William J. Fitzgerald

Executive Director, Finance, Operations, and RD Information Technology

Lisa Donovan George

Director, RD Information Technology

Human Resources and Strategic Talent Management

The Office of Human Resources and Strategic Talent Management (HR/STM) assists Resource Development’s senior team to attract quality talent, ensure their strategic engagement, and guide their performance and professional development in support of MIT’s advancement goals. The HR/STM team supports the work of all program areas within Resource Development relative to talent management, including: staffing and retention, employee engagement, performance management, employee relations, diversity and inclusion, professional development for management and staff, compensation, and rewards and recognition. In addition, HR/STM facilitates all organizational changes within Resource Development and drives the effort to create a comprehensive talent management strategy for the campaign and beyond.

In FY2015, the HR/STM team made significant progress building out the framework for strategic talent management in Resource Development while at the same time supporting the onboarding of a new Vice President. The framework for strategic talent management includes several new programmatic initiatives to support organization development and employee engagement. Of note, designed in collaboration with the MIT Alumni Association HR/STM team, is “Managing for Excellence in Advancement.” This program is for all supervisors and managers in both AA and RD and it includes sessions on Managing for Performance, Communication for Effective Management, Laws and Policies, and Mobilizing Diverse Teams.

Market conditions for fundraising talent, especially in the Northeast, continue to be very competitive. Many local and regional institutions are in a campaign cycle and they are aggressively recruiting frontline staff. Market pressures also continue to drive compensation upward while staff is frequently contacted by search firms. It is worth noting that the HR/STM team was able to maintain high quality results in recruiting that were in line with the planned milestones in Resource Development’s growth plan. Additionally, it appears that staff are compensated appropriately, and the significant number of professional development opportunities made available is helping to retain staff and promote from within RD. FY2015 closed with 36 positions filled; nine of those were internal promotions from either RD or MIT.

The HR/STM team continues to work with RD leadership to identify top performers and high-potential talent, taking action to increase their commitment to MIT. In FY2016, a talent review process will be introduced that will establish an operational discipline for this critical activity. In support of the broader Institute, the HR/STM team will continue to participate on a variety of MIT committees, including Compensation, Annual Salary Review, HRAC, and CSDI.

James G. Montague

Executive Director, Human Resources and Strategic Talent Management

Finance and Operations

The Finance and Operations (F&O) team supports all program areas within Resource Development and the MIT Alumni Association with the strategic allocation and management of financial resources, budget reporting and analysis, administrative operations, and facilities management. The F&O team continued to provide responsive and effective service to all units in RD and AA, emphasizing collaborative planning and teamwork to meet departmental goals.

The team participated in the onboarding of our new Vice President of Resource Development, Julie Lucas, by compiling a briefing book of unit summaries. In support of the Executive Vice President of the Alumni Association, Judy Cole, the team presented financial updates at quarterly meetings of the Alumni Board and staffed the Board's Finance Committee.

Senior members of the team continued to lead a working group of staff from the VP of Finance's Office, the Recording Secretary's Office, and RD's Stewardship group to create a multi-vectored plan for decreasing pressure on the General Institute Budget (GIB) through the gift stream. The working group identified several target areas for further activity, including endowed funds to be investigated for broader use, adjustments to internal mechanisms for replacing GIB allocations with gift funds, and tactics to promote and encourage unrestricted giving.

On the operations front, F&O staff continued implementation of the W98 space utilization plan at a near frenetic pace to accommodate newly hired staff, respond to staff ergonomic needs, and co-locate Campaign-imperative teams. Over the course of the year, the team coordinated a dozen office moves, 44 cubicle and office space adjustments, and handled 648 building maintenance requests.

In other service to the development community at MIT, the F&O team wrote and released a support staff resource page on the Campaign Toolkit website. In addition, quarterly Emergency Preparedness trainings were offered to new staff as well as refresher classes for current staff. The team coordinated the collection of data and questionnaires from all development teams across the Institute for the annual IRS Form 990 submission. With this data as a ready resource, the team now serves as the first point of contact to coordinate responses to all requests for advancement benchmarking surveys from other institutions.

Finally, determining and implementing the financial closing strategy for RD was the major activity of this last quarter for the F&O team. With a significant surplus projected due to open position savings and the knowledge that we did not plan to request a carryforward of those funds, we identified as many expenditures as possible that could legitimately be charged to FY2015. We foreshadowed the need to access the \$3.1 million and \$5.6 million in reserves during FY2016 in support of campaign activities. Our goal was to avoid FY2015 activity from spilling over into FY2016, during which time our budgets will be less flexible as we complete the staff build out.

William J. Fitzgerald

Executive Director, Finance, Operations, and RD Information Technology