

Vice President for Resource Development

The philanthropic generosity of individuals, corporations, and foundations has been an important source of revenue for MIT and has helped the Institute maintain its world-class status in education, research, and innovation. The [Office of Resource Development \(RD\)](#), in partnership with senior leadership, volunteers, faculty, and staff, reported the best year of philanthropic support in history in FY2017 and positioned itself for sustained fundraising at levels greater than \$500 million per year going forward. Results in FY2017 are as follows:

New gifts and pledges for FY2017 totaled \$588.5 million, the highest year on record for the Institute. New gift and pledge totals for the previous four fiscal years were \$527.9 million in FY2016, \$574.7 million in FY2015, \$456.8 million in FY2014, and \$324.8 million in FY2013.

Cash gifts and the fair market value of non-cash gifts for FY2017 totaled \$682.8 million, a 60% increase over FY2016. Cash gifts comprise cash and the fair market value of non-cash gifts received in full during the year, while new gifts and new pledges include outright cash gifts and new multi-year pledges to pay. Cash gifts and the fair market value of non-cash gifts for the previous four fiscal years were \$427.8 million in FY2016, \$449.9 million in FY2015, \$380.9 million in FY2014, and \$420.1 million in FY2013.

In this first year of the MIT Campaign for a Better World, Resource Development supported President Rafael Reif in bringing his vision for the future of MIT to community gatherings across the globe. Events in New York, San Francisco, Hong Kong, London, Tel Aviv, Los Angeles, Mexico City, and Washington, DC, brought together 3,600 alumni and friends over the year to hear faculty and students discuss exciting developments in the campaign's priority areas of human health, the health of the planet, education, and innovation, as well as the president's call for MIT's core needs for scholarships, professorships, and campus facilities. The MIT Campaign for a Better World aims to raise \$5 billion in private support. As of June 30, 2017, \$3.67 billion had been credited to the campaign, representing 73% of the goal.

Julie A. Lucas
Vice President, Resource Development

Office of Philanthropic Partnerships

The Office of Philanthropic Partnerships (OPP) coordinates and leads MIT's principal gift fundraising efforts. The office 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. Chief among OPP's responsibilities is the management of President and Mrs. Reif's Resource Development travel and strategy for select donor meetings. In addition, OPP works closely with colleagues to identify potential new MIT Corporation members and Institute volunteers

and coordinates high-level prospect strategy discussions with colleagues from across the Institute.

In collaboration with colleagues, faculty, and Institute leaders, OPP achieved the following results in FY2017:

- Closed \$285 million in new gifts and new pledges (includes amounts closed in collaboration with the Office of Foundation Relations (OFR) and a large anonymous commitment at its full value, which exceeds the amount recorded for the current campaign).
- Coordinated six presidential trips for Resource Development to 10 destinations.
- Conducted 99 individual presidential prospect meetings and events (46 domestic, 53 international) and executed 1,066 other principal gift-level prospect and donor contacts.

Throughout the year, OPP welcomed key donors to the campus for celebrations of their generosity, including Dr. James SB '58 and Dr. Marilyn Simons for the dedication of the Simons Building; Fady Jameel, son of Mohammed Jameel SB '78, for the launch of the Jameel World Education Lab; and Fariborz Maseeh ScD '90 for a dinner and reception to honor the fifth anniversary of the opening of Maseeh Hall. In addition, the team celebrated its receipt of a transformative \$140 million commitment for unrestricted purposes from an anonymous alumnus.

OPP worked with colleagues across the Institute in preparation for eight Campaign for a Better World regional events around the globe, helping to recruit speakers and host committee members and briefing President Reif for key prospect interactions. Also, the team orchestrated MIT's participation in the 2017 World Economic Forum annual meeting in Davos, Switzerland, bringing the Institute's key research to an international audience and establishing and advancing connections with prospective individual donors. In addition to orchestrating presidential travel, OPP planned and executed trips for numerous other senior leaders and key faculty, including Associate Dean Vladimir Bulović, Professor John Fernandez, Chancellor for Academic Advancement Eric Grimson, Associate Provost Richard Lester, Professor John Lienhard, Vice President Julie Lucas, MIT Corporation chairman Robert Millard, Dean Melissa Nobles, Executive Vice President and Treasurer Israel Ruiz, Dean Hashim Sarkis, Vice President Sanjay Sarma, Provost Martin Schmidt, Dean Ian Waitz, and Vice President Maria Zuber.

OPP worked closely with campaign co-chairs, Campaign Leadership Council (CLC) members, and other campaign volunteers on their outreach efforts; coordinated with honorary campaign co-chairs John SB '61 SM '65 and Cindy Reed to plan their MIT Engaging the World campaign event series; and collaborated with the campaign office on Chairman and Mrs. Millard's dinner series at their home in New York City.

Internally, the team completed the preparation of its comprehensive campaign plan, developed or refreshed action plans for its seven priority regions of focus (Boston, California, greater New York, Asia, Europe, Latin America, and the Arab world and Turkey), and adopted a schedule for updating the campaign plan annually and the

action plans semiannually. Keeping abreast of political and economic changes around the globe, OPP prioritized and began to shift regions of focus as appropriate, including hiring a new team member to expand North American fundraising efforts outside of New York and California.

The team created or adjusted portfolios for President Reif, Chancellor Grimson, and Vice President Lucas; designed and implemented a process for preparing quarterly progress reports for President Reif and Chancellor Grimson; and convened monthly portfolio review meetings with Vice President Lucas. In addition, OPP implemented a process for the preparation of fundraiser quarterly goals and redesigned the aforementioned high-level prospect strategy discussion meetings, creating a process for tracking prospect movement through the pipeline and integrating it with planning for discussion meetings with senior leaders.

Arundhati (Tuli) Banerjee
Executive Director, Philanthropic Partnerships

Office of Leadership Giving

The Office of Leadership Giving (OLG) cultivates and stewards alumni, parents, and friends capable of making gifts primarily in the range of \$100,000 to \$5 million. OLG collaborates with other offices in Resource Development, the MIT Alumni Association (AA), school development offices, 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 significant number of one-on-one visits between senior Institute leaders and important alumni and parent prospects and donors.

With the public launch of the Campaign for a Better World, OLG's three regional teams leveraged the excitement surrounding campaign events to connect with donors, encourage attendance, and coordinate senior officer and key faculty travel to the different regions. In addition, OLG executed a robust series of its own events both on campus and in major regions across the country. Visits were organized in Boston, northern and southern California, Chicago, Miami, metropolitan New York, Phoenix, Seattle, London, Texas, and Washington, DC, with key faculty covering a broad range of topics such as artificial intelligence, athletics, climate change, economics, human health, StartMIT, unrestricted giving, women in science and technology, and a freshman send-off event.

Events ranged from those sponsored by OLG or hosted by alumni volunteers to individual cultivation visits leveraging travel by senior officers and faculty, including Professor David Autor, Chancellor Cynthia Barnhart, Professors Martin Bazant and Paula Hammond, Professor Sangeeta Bhatia, Professor Arup Chakraborty, Professor Anantha Chandrakasan, Professor Glenn Ellison, Professors Jim DiCarlo and Joshua Tennenbaum, Professors Amy Finkelstein and Jim Poterba, Professor Peter Fisher, Abdul Latif Jameel Poverty Action Lab executive director Rachel Glennerster, Chancellor

Grimson, Professors David Gifford and Ernst Fraenkel, Chairman Millard, Dean Suzy Nelson, Dean Nobles, Executive Vice President Ruiz, Vice President Sarma, Dean Sarkis and Professor Dennis Frenchman, Education Arcade creative director Scot Osterweil, Provost Schmidt and Professor Kim Vandiver, and Professor Joel Schindall and Dean Waitz.

On campus, OLG's activities included the annual parents' orientation breakfast, participation in the Corporation Development Committee (CDC) annual meeting, the Alumni Association's Family Weekend, the Edgerton Center 25th-anniversary celebration, the Gerald Appelstein classroom naming, the grandstand and track celebrations, and top donor stewardship events on campus and in California, New York, and Washington, DC. OLG hosted the highly successful fall and spring "MIT: Here | Now | Next" campus visit programs, continued its East and West Coast Technology Breakfast series, worked with the Donor Relations and Stewardship Team to execute the third annual West Coast Scholarship Brunch, and collaborated with the Office of Gift Planning (OGP) on three Katherine Dexter McCormick Society events, one on campus and two in Florida.

Professional development and training to sharpen fundraising skills and content expertise remained a top priority during FY2017. Staff members were encouraged to attend professional conferences organized by the Council for Advancement and Support of Education, the Association of Fundraising Professionals, and Women in Development. In addition, OLG continued to hold its popular quarterly HAcK RD training program. Throughout one-on-one supervisory meetings, staff meetings, and departmental training sessions, OLG leadership continued to emphasize the importance of unrestricted giving and support of MIT's core priorities.

OLG continued its steady, disciplined approach and ended the fiscal year with strong results. Beyond our domestic borders, the group engaged in the second year of international outreach to select two to four rated prospects in the United Kingdom and Latin America.

Quantitative results for FY2017 include \$83 million in new gifts and pledges, against a \$68 million average annual run rate for the past four fiscal years. This number comprises outright gifts, life income gifts, and bequest intentions at the major gift level. OLG's \$83 million fundraising total represents 14% of MIT's FY2017 gift total; also, it represents \$4.3 million per OLG fundraising officer and \$2 million per OLG staff person. OLG managed 3,737 total prospects, and staff members planned and executed 1,868 visits for individual gift officers and MIT senior leaders. Non-alumni parent giving increased 17% to \$3.5 million.

Effective collaborations with the MIT schools, the Office of Gift Planning, the Annual Fund Leadership Giving Program, and the Office of Philanthropic Partnerships helped to facilitate new donor relationships, strengthen existing relationships, and achieve strong financial results.

Christina Toro
Executive Director, Leadership Giving

Office of Gift Planning

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

In contrast to preceding years, OGP was fully staffed in FY2017, which showed in the high pace of activity both in collaboration with frontline staff of other units and in the marketing of gift planning products. Gift officers engaged in frequent and consistent communications with staff in their assigned RD and AA units and schools, collaborating on planning, strategies, and donor visits. This team approach has paid off in an uptick in first-time life income donors, as well as other planned and blended gifts. In addition to individual portfolio collaborations, OGP staff offered training sessions on life income gifts, bequest proposals, other planned gift instruments, and the recently adopted bequest crediting policy.

Training of external constituents and key volunteers was also a priority during this first year of the Campaign for a Better World. Presentations were offered to attendees at the Alumni Leadership Conference and alumni reunions, and gift officers made individual visits to prospects and donors across the country, including trips to California, Florida, Maryland, Virginia, Texas, and Washington, DC. OGP also assisted the Office of Leadership Giving in organizing the StartMIT student and alumni reception and the Women in Science and Technology event.

In partnership with RD Communications, OGP implemented a greatly expanded marketing and communications strategy including a new website, printables, semiannual newsletters, postcards, and holiday cards. As a result of these engagement efforts, we reached 40,800 potential and existing donors via multiple touch points throughout the year. We also conducted the Alumni Bequest Intention Outreach Project, in which we contacted alumni with class years ending in 2 and 7 about crediting their bequest intentions. This outreach effort increased the dollar amount of credited bequests for FY2017 by 8.25%.

The annual fall Katharine Dexter McCormick Society appreciation brunch drew 180 guests, and two events featuring Professor Chappell Lawson (with the theme “How We Prepare Our Students for the Leadership Needed to Make a Better World”) were held in Florida (one in West Palm Beach and one in Naples) in partnership with the Alumni Association’s Emma Rogers and Cardinal and Gray Societies. The West Palm Beach event drew 73 guests, while the Naples event drew 58 guests.

OGP giving activity remained strong throughout FY2017; the results of our efforts in all areas of gift planning and resource development (e.g., life income, credited bequests,

bequest receipts, planned gift discussions that yielded outright donations), totaling \$116,843,967, are as follows:

- 25 new charitable remainder unitrusts (\$8,463,561)
- 79 charitable remainder unitrust additions (\$6,610,794)
- 13 charitable gift annuities (\$2,465,452)
- 2 pooled income funds (\$45,085)
- 5 outright gifts (\$789,887)
- 2 planned gift pledges (\$232,500)
- 47 bequest intentions (\$76,518,372) and 39 outside managed trusts (\$8,094,696) credited
- 59 realized bequest receipts (\$13,623,618)

Also, 141 new Katharine Dexter McCormick Society members were added, and two testamentary trusts were set up for receipt of funding from donors' estates after their passing.

Amy Goldman
Director, Gift Planning

Campaign Office

The Campaign Office provides structure and coordination to the MIT Campaign for a Better World and accountability to senior management, academic leadership, benefactors, and lead volunteers. The office made significant progress this year in the areas of campaign reporting, campaign priorities (fundraising, strategic development, and faculty engagement), policy development, engagement of volunteers through the Corporation Development Committee and Campaign Leadership Council, strategic planning, and capital project management.

The Campaign Operations group manages many of the policies and procedures necessary for the campaign, leads the planning for capital fundraising, develops and implements campaign reporting systems, and conducts data-driven analyses to guide decisions regarding strategic fundraising efforts. Among the highlights during FY2017, the team contributed to Institute construction and planning meetings, gained approval for numerous donor recognitions and gift opportunities, developed giving opportunities and pipelines for a number of projects (e.g., projects for Residential Life, Theater Arts, and Buildings E40, E37, E38, and 54), provided monthly fundraising updates and quarterly school updates to school and Institute leaders, collaborated with the Office of Communications to develop collateral, worked with the RD Information Technology team to properly reflect capital opportunities and named spaces in the Advance database

and giving site, established a workflow for proposals in the pipeline, and assisted with organizing and distributing presidential emails on several key news items such as the launch of *The Engine*, Bengt Holmstrom's Nobel Prize, and the president's *Wall Street Journal* editorial.

The Campaign Initiatives team works with faculty leaders to create, develop, and execute plans and fundraising strategies for campaign priorities (the MIT core, discovery science, the health of the planet, human health, innovation and entrepreneurship, and teaching, learning, and living), along with directing thematic content, coordinating ongoing campaign task forces, and tracking campaign activities. The team organized numerous overviews and spotlight sessions throughout the year on campaign priorities for frontline staff across the Institute; created the "campaign flexible case" binder in collaboration with the RD Office of Communications; supported fundraising strategies, messaging, and proposal processes for several of the campaign priority areas; and collaborated with individual fundraisers in both RD and the schools on fundraising strategies and proposal development.

The Corporation Development Committee, the Institute's permanent standing volunteer fundraising organization, successfully executed its annual meeting in conjunction with the Alumni Leadership Conference. Recognizing the integral nature of Alumni Association and Resource Development work with volunteers, CDC staff convened a working group for staff who manage volunteers to meet and discuss best practices, regional activities, tools and resources, and ways to collaborate on enhancing the volunteer experience. Regional meetings during FY2017 were held in New England, New York, northern and southern California, the mid-Atlantic, the Midwest, Texas, and, for the first time, Hong Kong. The team organized the fall membership cycle, produced a new membership book and the CDC newsletter, and launched a web form to capture committee members' areas of interest and how they would like to help with fundraising.

The inaugural meeting of the Campaign Leadership Council was held in the fall, and by the spring meeting the council had grown to 25 volunteers. The primary charge for the co-chairs and CLC members is to serve as ambassadors for the campaign within their networks, helping to connect MIT with alumni and prospective friends. To accomplish this aim, CLC staff managed the outreach process, developed screening lists, and worked with council volunteers on their event participation and strategic conversations.

The Campaign Engagement team shares information and identifies strategies and opportunities for deployment of senior officers and other campaign leaders. Among their numerous activities, staff coordinated 164 appointments and events for President and Mrs. Reif, developed a streamlined process for Gray House dinners and RD Gray House protocols, conducted briefing sessions on high-level prospects and meetings for the president and chairman, organized the chairman's salon dinner series for top prospects, and participated in prospect strategy sessions for the chairman and president.

Sarah Kruse
Campaign Director

Office of Foundation Relations

As one of the three front-facing fundraising units in Resource Development, the Office of Foundation Relations (OFR) identifies, cultivates, and engages foundations to maximize support to the Institute from this sector. OFR staff work to identify foundation opportunities aligned with Institute priorities and to develop strategies for successful approaches. In FY2017, OFR continued to place emphasis on foundations whose goals are aligned with thematic MIT campaign priorities, working closely with the Campaign Office on strategies in this area. The team focused primarily on the highest yield opportunities, prioritizing discussions with the potential to lead to donations of \$1 million or higher.

OFR's cultivation and management of relationships with foundations was carried out strategically, in coordination with key stakeholders and partners across the Institute. In addition to working collaboratively with the Office of Philanthropic Partnerships on jointly managed foundation relationships, we worked with colleagues in other units in Resource Development, the Office of the President and other senior leadership, and deans, faculty, and development and program staff in the five schools. OFR also worked closely with other campus units, including the Office of Sponsored Programs, the Office of the General Counsel, the Office of the Recording Secretary, the Office of Corporate Relations, and the Technology Licensing Office.

During FY2017, OFR staff were involved in driving strategy, staffing senior officer interactions, and playing lead roles in numerous significant foundation approaches, including with the Paul G. Allen Family Foundation, the Arnold and Mabel Beckman Foundation, the Chan Zuckerberg Initiative, the Bill and Melinda Gates Foundation, the Glenn Foundation for Medical Research, the Andrew W. Mellon Foundation, the Alfred P. Sloan Foundation, the Wal-Mart Foundation, and two anonymous foundations.

OFR staff organized visits to the campus for foundation representatives; arranged and staffed senior officer meetings with foundation heads; worked closely with faculty and others to develop strategies and proposals; facilitated faculty-foundation interactions; identified, qualified, and engaged new foundations; informed senior leaders and faculty of relevant foundation opportunities; stewarded foundation donors; and kept current on trends in the field.

OFR's key results in FY2017, achieved in partnership with colleagues, faculty, staff, and senior leadership, included the following:

- 60 new gifts and pledges (including 18 of \$1 million or more) totaling \$56.9 million (an average of \$9.4 million per fundraiser and \$4.4 million per team staff person). FY2017 was OFR's best year to date, with a 9% increase over the team's previous most successful year (FY2015).
- 24 presidential foundation visits with OFR involvement.
- 59 senior officer/dean foundation visits with OFR involvement
- 93 additional foundation visits and significant interactions

- Significant organizational advances during FY2017 included:
- Creation and implementation of a new goal-setting process for foundation relationship managers
- Revision and updating of the OFR handbook, data entry guide, and Advance reports guide
- Work with the Office of the Recording Secretary to ensure that foundation-sponsored research awards are included in the Advance donor and alumni database
- Development and refinement of a systematic process for collaboration with the Office of Philanthropic Partnerships on relationships in which there is a living unaffiliated donor associated with the foundation
- Benchmarking of peer universities regarding presidential stewardship letters for foundation gifts

Lindley Huey
Executive Director, Foundation Relations

Office of Communications, Events, Donor Relations, and Stewardship: 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. Both the Communications and Events sides of the group focused on supporting regional campaign events around the world while still serving the individual communications and event planning needs of clients across the Institute. Equally important was their focus on strengthening collaborative relationships with the MIT schools, the Office of the President, the Alumni Association, and MIT Communications.

Strategic effort was invested throughout the year in preparing presentations on campaign priorities, marketing, and financials for the MIT Corporation, the Executive Committee, school councils, and the Corporation Development Committee. In collaboration with MIT Communications, the Campaign Office, and the Alumni Association, the editorial team guided senior leadership, faculty, and staff in communicating about the campaign and supported President Reif in sharing Institute news with key donors, including his piece in *Foreign Affairs* ("How to Maintain America's Edge: Increase Funding for Basic Science"), his December op-ed in the *Wall Street Journal* ("The Dividends of Funding Basic Science"), and the \$140 million anonymous gift announcement.

The team won several notable awards this year, including a Webby for the campaign website, recognition at the CASE (Council for Advancement and Support of Education) District I level for the *Spectrum* redesign and the *102 Inventions* book, and recognition at the CASE international level for regional events associated with the Campaign for a Better World.

A key accomplishment during FY2017 was the creation of the “campaign flexible case,” containing striking printed brochures, one-pagers, and infographics on campaign priority areas in a flexible binder format that can be personalized to a particular visit or donor. The team also developed design standards for campaign branded print and online communications; planned the digital strategy for the campaign in partnership with the Alumni Association, MIT Communications, and the schools; and produced campaign event collateral such as invitations, programs, folders, notecards, letterhead, business cards, and email and digital marketing templates. This year saw the conclusion of work with an external design firm on production of campaign-related videos for use at events and online.

In addition to signature campaign projects, the Communications and Events teams successfully managed “business as usual,” writing, designing, and producing a steady stream of printed and electronic communications and deliverables for the President’s Office, the Offices of Leadership Giving and Gift Planning, the Office of Philanthropic Partnerships, and many of the fundraising units across the schools and departments. These efforts included, but were not limited to, printables on campaign themes; development of more than 50 concept notes and proposals for nine-figure gifts related to major campaign initiatives; stewardship videos and photo books for transformational donors including Samuel Tak Lee SB ’62, SM ’64, Victor Fung SB SM ’66, Mohammed Jameel SB ’78, and James SB ’58 and Marilyn Simons; donor profiles for *MIT Technology Review*; regular publication of *MIT Spectrum*, the Institute’s development publication for prospects, donors, faculty, and staff; coordination of major announcements about gift agreements and campaign progress; production of a robust series of Planned Giving communications, including the newly created *Corridor* publication; design and production of presidential holiday cards; production support for the new 77 Society for a Better World; continuous maintenance and updating of the MIT advancement intranet known as the campaign toolkit; writing, design, and production of numerous event collateral, news digests, media announcements, brochures, analytic reports, summaries, and articles; and creation of high-quality gifts for top prospects.

During FY2017, Resource Development and the Alumni Association supported the president in taking the Campaign for a Better World “on the road” to regional venues in eight alumni markets: New York, San Francisco, London, Hong Kong, Tel Aviv, Mexico, Los Angeles, and Washington, DC. Five cities are planned for FY2018, and another four to five are under consideration for the following year. Beyond these signature events, the team supported other RD units, the President’s Office, and school and departmental partners in planning and executing a large number of cultivation and stewardship events around the world, including (but not limited to) the CDC annual meeting; President Reif’s dinner and reception at the World Economic Forum in Davos, Switzerland; the Katharine Dexter McCormick Society annual appreciation brunch;

receptions for the Bose Fellows, Tang Fellows, and Jacobs Fellows; the fifth anniversary of the dedication of Maseeh Hall; a freshman summer send-off hosted by John SB '88 and Stella Seo; fall and spring campus visits by groups of major donors; and a number of gift signing ceremonies both on the campus and across the world.

Whitney Espich

Executive Director, Communications, Events, Stewardship, Donor Relations, and Stewardship

Office of Communciations, Events, Donor Relations, and Stewardship: Donor Relations and Stewardship

The goal of the Donor Relations and Stewardship (DRS) team is to advocate for and pursue gift-focused and donor-focused activities that cultivate donors' confidence, trust, and good feelings in order to encourage their continued support. The team fosters the relationship between MIT and its donors through four foundational principles: acknowledgment, recognition, engagement, and reporting.

Acknowledgment

At the beginning of the year, the basic language of presidential acknowledgment letters was refreshed to incorporate and build upon messaging related to the Campaign for a Better World. Other important correspondence produced by the DRS team included unrestricted and scholarship gift acknowledgments from David Woodruff SB '78, RD's associate vice president and chief operating officer, and Julie Lucas, RD's vice president. The volume of these three types of correspondence increased significantly from FY2016 to FY2017 (by more than 25%).

Recognition

A key development in FY2017 was the establishment of the 77 Society for a Better World, a new major donor campaign recognition society (recognizing gifts of \$100,000 to \$1 million). Members received a commemorative pewter/silver medallion and an invitation to the VIP reception with President Reif at regional campaign events. To date, 1,035 individuals have been welcomed to the society.

The MIT Charter Society, a permanent recognition society, honors donors who have made gifts to the Institute totaling \$1 million or greater. This year, 61 new donors were added to the Charter Society.

In addition, DRS identified donors to be recognized through stories in *MIT Technology Review* and *MIT Spectrum* and submitted 11 naming and plaque recognition memos to the MIT Building Committee. The office also acknowledged two fund milestones (15 years of a donor-named scholarship fund and 10 years of a donor-named Presidential Fellowship Fund) and collected and compiled letters from past beneficiaries, which were presented to each donor as a gift. In addition, the team produced a video featuring current recipients of another donor-named scholarship and a certificate commemorating the renaming of a scholarship.

Engagement

Donor Relations and Stewardship held annual signature events to bring scholarship donors together with the students they support. These events included the annual on-campus scholarship and Undergraduate Research Opportunities Program (UROP) brunch, this year featuring Chancellor Cynthia Barnhart; the third annual version of this brunch on the West Coast, featuring Chancellor for Academic Advancement Eric Grimson; and two other small scholarship events. DRS also coordinated 20 small private meetings or other relationship-building opportunities for donors (both individual and corporate) and their scholars throughout the year.

The team assisted with planning the celebration of the fifth anniversary of the opening of Maseeh Hall and collaborated with the New York Metro team in the Office of Leadership Giving to invite donors of unrestricted gifts of \$100,000 and above to a luncheon with Executive Vice President Israel Ruiz.

The DRS team introduced a project to develop personalized stewardship plans for donors who have committed \$100,000 or greater to the Campaign for a Better World. To date, in collaboration with relationship managers in the Office of Leadership Giving, we have created 372 individual plans involving 597 specific stewardship tasks. In the year ahead, we will undertake similar conversations with our colleagues in the Office of Philanthropic Partnerships, the Office of Foundation Relations, and the Office of Planned Giving.

Reporting

DRS worked with the RD Communications team on a new and improved layout and digital design for the annual donor reports. The team collaborated with Resource Development–Information Technology (RD-IT) on numerous system enhancements, including a web form to capture prospect stewardship plans and reporting, beneficiary review changes, and improvements in new gift and pledge reporting to capture stewardship plan changes. In addition, the priority scholarship reporting process was improved, including refinement of the timeline for mailings, enhancements to the scholarship database and website, and use of a central Information Services and Technology product for reporting related to Presidential Fellows. In collaboration with the RD-IT group and the Campaign Office, work was finalized on capital opportunities and named spaces applications in the Advance donor and alumni database.

Stewardship for undergraduate scholarship funds continued, with enhancements to content and format. Approximately 800 individuals received financial and/or usage reports, and nearly 300 individuals also received videos or letters from the named beneficiaries of their funds. In addition, personalized comprehensive reports were prepared for four of the largest donors to the Institute.

Jennifer McGrath

Director, Donor Relations and Stewardship

Information Technology

The Resource Development–Information Technology (RD-IT) team provides technical management, maintenance, and support of central fundraising systems. This includes the Advance database, which is managed in partnership with the MIT Alumni Association. RD-IT also provides reporting, web and application development, and technical support and services to Resource Development and other fundraising staff throughout the MIT schools and departments.

During FY2017, RD-IT devoted a great deal of effort to supporting the Campaign for a Better World. An automated monthly campaign progress report and a quarterly executive campaign progress report were completed and put into routine distribution. Work to support regional campaign events included the development of a website, modifications to event systems and workflows, and development of systems to manage data needs, streamline list management, and facilitate reporting.

Other signature projects included development of reports and workflows for the 77 Society for a Better World, the new major gift recognition group. A building opportunities application was rolled out to facilitate ongoing tracking of available space in need of donor support, as well as a complementary named spaces application that enables tracking of donors and other details related to named spaces. In support of a management decision to adjust some of the prospect rating bands, a significant amount of code and data manipulation took place. Efforts to build new and robust reporting tables to facilitate more complex reporting were completed, and the underlying staff crediting model codes were revised in order to build a framework for producing staff metrics and dashboards. The MIT Hong Kong Foundation website and gift acceptance system were developed to offer our Hong Kong alumni and friends a tax-efficient solution for charitable giving.

In addition to these signature projects, our traditional programming, business analysis, infrastructure, training, and support work continued apace. For instance, a new tableau server was configured and brought online, proposal tagging was developed to refine pipeline reporting, prospect management web forms were upgraded, modifications were made in support of the scholarship reporting cycle, and a number of important servers were upgraded, including the Advance database.

William J. Fitzgerald

Executive Director, Finance, Operations, and Resource Development–Information Technology

Lisa Donovan George

Director, Resource Development–Information Technology

Office of Prospect Development

The mission of the Office of Prospect Development is to gather and analyze knowledge about individual prospects and donors and provide tools for sharing and using that knowledge. As stewards of MIT's fundraising institutional memory, the office archives and makes available historical records that offer a context for ongoing strategies.

A major emphasis of FY2017 was the effort of a working group of fundraisers, prospect development staff, administrators, and RD-IT staff who reviewed and analyzed the recommendations of an external consultant, the Zuri Group. The team formed three task forces to (1) build stronger strategic partnerships with fundraisers, (2) improve the efficiency of the capacity evaluation process, and (3) redefine and redesign research briefs to be more customizable to user needs. The effort included focus group sessions with a cross section of fundraisers from Resource Development, the Alumni Association, and the MIT schools.

Toward the end of the year, a key recommendation of the Zuri Group was implemented when Deb Cunningham was brought on board in the new position of executive director of strategic information management. In this role, she will oversee both the Information Technology and Prospect Development units and will seek to develop a more modern, streamlined, holistic information environment that serves the strategic goals of MIT's fundraising enterprise.

Campaign-related work included preparing biographies of the members of the host committees for regional campaign events and working with the Campaign Office to prepare prospect screenings for the Campaign Leadership Council and other senior leaders and key volunteers.

A major infrastructure project was the prospect rating bands review, which involved developing more refined ratings at the high net worth end of the scale and individually reviewing and re-rating over 2,000 prospects according to the new guidelines. Other signature projects included helping the Leadership Giving team prioritize regional pools of unmanaged prospects and review lapsed New England prospects, supporting the Campaign Office on a prospecting project for the Health of the Planet campaign initiative, collaborating with regional leads in the Office of Philanthropic Partnerships to provide strategic information on unaffiliated prospects of ultra-high net worth, and reviewing legacy applicants' admissions decisions. During the year, a group of stakeholders from Leadership Giving, Philanthropic Partnerships, and the Sloan School of Management were called together to form a review committee to approve assignments of international non-Sloan GSE (graduate student exclusive) prospects rated at the major gift level.

Extensive training was provided on prospect management tools and policies to new fundraising staff across the Institute, as well as monthly refresher training sessions for existing staff. Special training was provided to all development assistants on running the upgraded research briefs in the format that best meets the needs of their frontline users.

Overall, the Prospect Development team produced 1,304 research reports and 2,224 capacity evaluations on prospective donors, identified 1,514 new major gift prospects, and processed 23,265 data entry requests.

David Woodruff

Associate Vice President and Chief Operating Officer

Office of Human Resources and Strategic Talent Management

The Office of Human Resources and Strategic Talent Management (HR/STM) assists Resource Development's senior team in attracting quality talent, ensuring their strategic engagement, and guiding 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 RD and drives the effort to create a comprehensive talent management strategy for the campaign and beyond.

During FY2017, the remaining positions approved for expansion to support the campaign were filled, including the critical role of director of donor relations and stewardship and several key frontline positions. These hires completed the reorganizations in several units to fully support campaign priorities and ongoing strength in fundraising. HR/STM also collaborated with the Finance and Operations (F&O) team to develop a viable budget request to support the success of the campaign while respecting limits on Institute resources. Midway through the year, Jim Montague, executive director of strategic talent management, resigned from his position, and Bill Fitzgerald, executive director of finance, operations, and RD systems, assisted in filling the leadership gap by providing daily guidance to the team, which will formally report to the associate vice president/chief operating officer until a new executive director is hired. A search is currently under way to fill that position.

In full partnership with the Alumni Association, several major programs were rolled out to both RD and AA staff. The teams developed and implemented an annual talent review process that will allow us to make data-driven talent management decisions. Both RD and AA began using the Institute's new performance development and review system for mid-year supervisor/staff member check-ins and year-end goal setting. Also, teams in RD and AA implemented the Gallup employee engagement survey for the third year.

The joint RD-AA diversity and inclusion working group expanded its lineup of events during FY2017 with programs on unconscious Bias, cultural awareness, and why diversity programs fail, as well as a highly successful multicultural potluck. The health and wellness series included a robust set of sessions ranging from stress management

to conflict resolution and bike safety. The “managing for excellence” training program continued, as did the annual institutional intelligence forum training program.

During FY2017, 31 positions were filled, of which 17 were internal promotions from either Resource Development or elsewhere at MIT. In support of the broader Institute, the HR/STM team will continue to participate on a variety of MIT committees, including compensation and annual salary review. In addition, HR/STM team members will continue their participation in sessions sponsored by the Council for Advancement and Support of Education and the Association of Fundraising Professionals.

David Woodruff

Associate Vice President and Chief Operating Officer

Finance and Operations

The Finance and Operations (F&O) team supports all program areas within Resource Development and the MIT Alumni Association through 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 services to all RD and AA units, emphasizing collaborative planning and teamwork to meet their goals.

F&O staff led the rollout in RD and AA of Buy-to-Pay (B2P), the Institute’s new purchasing and payment system. Both Resource Development and the Alumni Association participated in the first pilot of the system at MIT, and F&O worked closely with the Office of the Vice President for Finance (VPF) to provide feedback, identify issues, and suggest improvements. MIT’s new eShip portal for managing express shipments was also rolled out to both RD and AA.

In association with preparing the FY2018 budget, F&O staff supported the associate vice president/chief operating officer in establishing more structured processes for budget allocations and hiring decisions and facilitated the executive directors’ phase 1 strategic planning sessions. During phase 2 all units will hold individual retreats, after which the executive directors will reconvene to create a cohesive FY2018 strategic plan with a new emphasis on metrics.

Senior members of the team continued to work with staff from VPF and the Office of the Recording Secretary to identify the elements of a campaign cost and gift forecasting model and dashboard. Two team members also facilitated a working group to analyze and implement some of the recommendations of an external consultant’s assessment of the RD prospect development function.

On the operations front, F&O coordinated major efforts to reconfigure work spaces and create more seats in Building W98; also, major HVAC (heating, ventilation, and air conditioning) repair work and façade leak testing were completed. In addition,

F&O coordinated a complex move of the “Tech Callers” from W31 to the space in W20 vacated by the Parking and Transportation and Card offices. Over the course of the year, the team coordinated 78 office moves, reconfigured or adjusted 103 cubicles and offices, handled 758 building maintenance requests, and processed 8,266 financial transactions.

Efforts toward the “greening of W98” continued, and the F&O staff member who leads the W98 green committee was presented an Institute Excellence Award. Quarterly emergency preparedness training sessions were offered to new staff, along with refresher classes for current staff. The team coordinated the collection of data and questionnaires from all advancement teams across the Institute for MIT’s annual Internal Revenue Service form 990 submission. With this information 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.

William J. Fitzgerald

Executive Director, Finance, Operations, and Resource Development–Information Technology