

Vice President for Resource Development

The philanthropic generosity of individuals, corporations, and foundations has been an important source of revenue for MIT; it has helped the Institute maintain its world-class status in education and research and rise to a world leadership role in innovation. The [Office of Resource Development](#), in partnership with MIT's senior leadership, volunteers, faculty, and staff, reported the third-highest year of philanthropic support in FY2016 and has positioned itself for sustained fundraising at this level.

In FY2016, new gifts and pledges totaled \$529 million, the third-highest year on record and the second highest for the capital campaign. Cash gifts and the fair market value of noncash gifts totaled \$428.1 million.

Cash gifts comprise cash and the fair market value of noncash gifts received in full during the year, while new gifts and new pledges include outright cash gifts and new multiyear pledges to donate. Cash gifts and the fair market value of noncash gifts for FY2016 can be compared with:

- \$449.8 million in in FY2015
- \$380.9 million in FY2014
- \$420.1 million in FY2013
- New gifts and new pledges for FY2016 can be compared with:
 - \$574.7 million in FY2015
 - \$459.3 million in FY2014
 - \$326.4 million in FY2013

In May 2016, MIT launched its most ambitious, comprehensive campaign in history, the MIT Campaign for a Better World. Organized around MIT's priorities of research, education, innovation, and core needs for scholarships, professorships, and the MIT campus, the MIT Campaign for a Better World aims to raise \$5 billion in private support. As of June 30, 2016, \$2.9 billion has been credited to the campaign, representing 58% 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 gifts 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. OPP also coordinates discussions of strategies for approaching high-level prospects with colleagues from across the Institute.

In collaboration with colleagues, faculty, and Institute leaders, OPP achieved the following results in FY2016:

- Recorded \$200 million in new gifts and new pledges, including nine gifts of \$5 million or more;
- Coordinated four presidential trips for Resource Development; and
- Conducted 162 individual presidential prospect and meetings and events (74 domestic, 88 international) and executed 692 other principal gift-level prospective donor and donor contacts.

In October 2015, OPP worked closely with *Technology Review* to coordinate outreach to donors and prospects who were attending the first SOLVE event. Through the year, OPP worked with Bethany Millard in her role as chair of the Corporation Partners Program; participated in the planning and execution of the annual meeting (part of which took place on campus) of the Group of 50, an organization of prominent business leaders from Latin America; and helped plan and coordinate the Koch Institute's fifth anniversary celebration event. The team organized several senior officers' international trips to prepare for and execute the launch of the MIT Hong Kong Innovation Node and coordinated MIT's participation in the 2016 World Economic Forum meeting in Davos, Switzerland, bringing the Institute's work on health to an international audience and establishing and advancing connections with prospective individual donors.

In FY2016, OPP welcomed numerous key campaign donors to campus for celebrations of their generosity. Samuel Tak Lee came for the dedication of the Samuel Tak Lee Building in the Center for Real Estate; Morris and Sophie Chang came for the dedication of the Morris and Sophie Chang Building (E52); Victor Fung came to mark the signing of his \$15 million gift to name a new maker space on campus; and Alan and Sherry Leventhal came for the signing of their \$14.7 million gift to name the Norman Leventhal Center for Advanced Urbanism. In addition, the OPP team coordinated a signing ceremony in Cambridge to finalize Terry and Susan Ragon's \$14 million gift to create the Phillip and Susan Ragon Professorship Fund.

Following the promotion of Tuli Banerjee to the position of executive director in December 2015, OPP undertook an effort to set up its own robust infrastructure in preparation for the public phase of the Campaign for a Better World by merging the former domestic Philanthropic Advising Team and Office of Global Initiatives into one strategically aligned team. Changes included the centralization of OPP's research, strategy, and operations functions in an effort to streamline processes; the reconfiguration of international portfolios to enable staff to focus solely on transformational and principal prospects; the development of a clear set of metrics for evaluating frontline work; and the redesign of the 1-rated strategy meetings. In addition to developing prospect portfolios for Chairman Robert Millard and Vice President Julie Lucas, and updating such portfolios for President Reif and Chancellor Eric Grimson,

OPP collaborated with the Campaign Office in identifying potential campaign co-chairs and members of the Campaign Leadership Council and helped to brief President Reif for his conversations with these candidates. Overall, the team spent considerable time working to develop its comprehensive campaign plan, including the pipeline for the remainder of the campaign and FY2017 senior officers' travel plans, preparing detailed regional action plans for its fundraising efforts in New York and California, and beginning the development of a regional action plan for the Boston area.

Arundhati (Tuli) Banerjee
Executive Director, Philanthropic Partnerships

Office of Leadership Giving

The Office of Leadership Giving (OLG) cultivates and acts as steward for individual alumni (and a very few friends) who are capable of making gifts in the range of \$100,000 to \$5 million. OLG collaborates with other offices in the Office of Resource Development, the MIT Alumni Association, School development officers, 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. Activity was high, especially in the third quarter of the year, in anticipation of the public launch of the Campaign for a Better World.

With the appointment of Christina Toro as executive director, OLG was reorganized into three regional groups, each headed by an associate director. The new structure will enable better focus in each region, redistribute and balance portfolios, and provide the bandwidth for the associate directors to guide and support their team members in qualifying, cultivating, and soliciting major gifts. In addition to reorganizing OLG, Chris Toro assumed leadership of the Office of Gift Planning. With the campaign launch, the OLG team focused on qualifying new prospects and closing gifts for the nucleus fund.

Over the year, OLG executed a robust series of events both on campus and in major regions and cities across the country. Visits were organized in Northern and Southern California; New York; Colorado; Chicago; Texas; Washington, DC; Miami; and Atlanta, with key faculty covering topics such as PreK–12, StartMIT, the Chemical Engineering Practice School, the Department of Economics, the MIT International Science and Technology Initiatives Program, the Institute for Data, Systems, and Society, and several freshman sendoff events, among others. These events ranged from those sponsored by OLG or hosted by alumni volunteers to individual cultivation visits that leveraged senior officers' and faculty members' travel to the region.

On campus, OLG's activities included the annual Parents Orientation breakfast, participation in the Corporation Development Committee annual meeting, working with *Technology Review* to plan the inaugural SOLVE event, attending the annual Physics Reception, and participating in the Alumni Association's Family Weekend as well as in

top-donor stewardship events on campus and in New York. In the fall, OLG hosted the highly successful Campus Visit program on the theme of “MIT: Here | Now | Next,” continued its East Coast and West Coast Technology Breakfast series, and worked with the Donor Relations and Stewardship team to execute the second annual West Coast Scholarship Brunch.

Professional development and training to sharpen fundraising skills and content expertise remained a top priority during FY2016. 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 trainings, OLG leadership continued to emphasize the importance of unrestricted giving and support of MIT’s core priorities, especially within the \$100,000 to \$5 million gift range.

OLG continued on a positive trajectory with new gifts and new pledges raised. Although there were several staff transitions in OLG throughout the year, the group continued its steady, disciplined approach and ended the fiscal year with strong results. The effective collaborations with the Schools and the Office of Gift Planning helped to maximize new and existing donor relationships. The introduction of the new bequest intention policy bolstered FY2016 new gifts and new pledges by more than \$9 million. With stability and professionalism in the gift officer ranks domestically, OLG launched a fundraising pilot in the UK (predominantly in London) and in selected parts of Europe. This pilot seeks to qualify, cultivate, and solicit select 2-, 3-, and 4-rated prospects. Initial outreach has been well received and gift discussions are progressing.

Quantitative results for FY2016 included:

- Approximately \$83 million came in new gifts and pledges, against a \$54 million average annual run rate for the past four fiscal years. This number includes outright gifts, life income gifts, and bequest intentions.
- The OLG fundraising total of \$83 million in new gifts and new pledges represents 15.6% of MIT’s FY2016 gift total (\$4 million per fundraising officer in OLG and \$2 million per staff person on the team).
- OLG managed 3,180 prospects.
- OLG staff planned and executed 2,354 visits for individual gift officer and MIT senior leadership.
- Non-alumni parent giving held steady at \$3 million (capped dollars).

With continued focus on effective annual planning and a solid regional organization in place, OLG is prepared to move enthusiastically into the public phase of the campaign.

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 a qualified retirement plan. OGP provides support to the work of OLG and OPP frontline staff in the Office of Resource Development, in the Annual Fund, in the MIT Alumni Association, in the five Schools, and in departments, centers, institutes, and various arts organizations throughout the MIT campus.

With the director of gift planning position filled early in the fiscal year, OGP was able to continue streamlining its giving and engagement strategy while shaping new marketing and communications objectives. Gift officers were deployed to work closely with other internal Resource Development units, Alumni Association partners, and School of Development fundraisers to establish clear work plans and education surrounding planned giving resources. This year, a large emphasis was placed on analyzing bequest intention data and integrating this information into the Advance donor information database to track proposals. The result of this effort culminated in a new bequest crediting policy, which was approved and made retroactive to January 1, 2016. Training, implementation, reporting, setting staff expectations, and tracking metrics will be incorporated into the new bequest credit process.

Throughout the year, and in partnership with Resource Development's Office of Communications, OGP finalized a robust marketing and communications strategy, including a website revamp, new printables, semiannual newsletters, postcards, and holiday cards. OGP reached 22,090 potential and existing donors as a result of these new engagement efforts through multiple touch points throughout the year.

In addition to the annual fall Katharine Dexter McCormick Society appreciation brunch, OGP partnered with the Alumni Association's Emma Rogers and Cardinal and Gray Societies to host new sister events in Northern and Southern California this past spring. These events served to deepen the stewardship, education, and cultivation of a vital planned giving donor base on the West Coast.

OGP giving activity remained strong throughout FY2016, culminating in 113 planned gifts that totaled \$15,312,633, including:

- 21 new charitable remainder unitrusts totaling \$5,348,720
- 66 charitable remainder unitrust additions totaling \$7,477,199
- 22 charitable gift annuities totaling \$2,396,565
- Two pooled income funds totaling \$30,291
- Two relinquishments of life interest totaling \$59,856
- 113 new Katharine Dexter McCormick Society members as a result of mailings and outreach

- 14 bequest intentions and seven outside managed trusts credited totaling \$41 million
- Realized bequest receipts totaling \$20,344,282

Amy Goldman
Director, Gift Planning

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 in developing the campaign architecture, priority fundraising, staffing, reporting, and policy development. Significant headway was made in volunteer engagement through the CDC and the Campaign Leadership Council, as well as capital project management.

The public launch of the MIT Campaign for a Better World took place on May 6, 2016, in conjunction with the weekend centennial celebration of MIT's move from Boston to Cambridge. This was the culmination of months of planning pre-launch messaging, mapping donor interests, confirming panelists and invitees, and taking care of a host of other details in collaboration with relationship managers, the Communications and Events teams, and the Alumni Association.

Other key accomplishments during FY2016 included establishing a smoother process of memorandum submission to the Building Committee and securing approval for the donor naming of campus space, working with the Resource Development Information Technology (RD-IT) unit to refine the naming opportunities inventory and associated reports in the Advance donor information database, hosting private donor tours of E52, and organizing presentations on Campus 2030. Campaign Office staff also collaborated with the Communications unit on the development of collateral materials for unrestricted giving, Kresge Auditorium, and the Metropolitan Warehouse; established the C-meet meeting request process for senior officers and faculty leaders; worked on campaign communications, including the campaign website and other collateral materials; and built a strategy for Chairman Robert Millard's fundraising work, including establishment of the Chairman's Salon dinners.

The Campaign Office worked closely with faculty leaders to develop fundraising plans for the key campaign initiatives, including Discovery Science; Health of the Planet; Human Health; Innovation and Entrepreneurship; Teaching, Learning, and Living; and the MIT Core. Resource Development leadership and the Campaign Office staff gave overview presentations to many parties, including the Corporation, the Corporation Development Committee, the Academic Council, the Venture Mentoring Service, the School and departmental development officers, the Executive Committee, and various units across Resource Development and the Alumni Association. Campaign Office staff participated in planning specific senior officer and key faculty visits.

The Corporation Development Committee—the Institute’s permanent standing volunteer fundraising organization—successfully executed its annual meeting in conjunction with the Alumni Leadership Conference. The committee also created a series of documents, including the Annual Meeting Learning Objectives, Membership Book, Handbook, the inaugural Corporation Development Committee newsletter, and a new committee website. Regional meetings during FY2016 were held in New England, New York, Northern and Southern California, the Mid-Atlantic region, Florida, and Texas. To support the public phase, additional campaign co-chairs were recruited, bringing the total to six with two honorary co-chairs. A first round of recruiting for the Campaign Leadership Council was also completed. The primary charge for the co-chairs and Campaign Leadership Council members is to serve as ambassadors for the campaign within their networks, helping to connect MIT with alumni and prospective friends.

Sarah Kruse
Campaign Director

Office of Foundation Relations

The Office of Foundation Relations (OFR) cultivates and engages foundations to maximize support to the Institute from this sector. OFR staff work to identify foundation opportunities that are aligned with Institute priorities, and to develop strategies for successful approaches, giving priority to larger foundations with significant funding capacity. In FY2016, OFR placed emphasis on foundations that had goals and strategies that were aligned with the thematic MIT campaign priorities—Discovery Science; Health of the Planet; Human Health; Innovation and Entrepreneurship; and Teaching, Learning, and Living.

In all its efforts, OFR seeks to ensure that the cultivation and management of relationships with foundations is carried out strategically, in coordination with key stakeholders and partners across the Institute. OFR works closely with colleagues in OPP and other units in Resource Development, with School- and department-based development staff, with the offices of President Reif and other senior leaders, and with deans, faculty members, and program staff in the five schools. OFR also works in collaboration with other campus units, including the Office of Sponsored Programs, the Office of the General Counsel, the Recording Secretary’s Office, the Office of Corporate Relations/Industrial Liaison Program; and the Technology Licensing Office.

OFR staff members organize visits to campus from foundation representatives, arrange and staff senior officers’ meetings with foundation heads, facilitate faculty–foundation interactions, and work closely with faculty and others to develop strategies and proposals. They also identify, qualify, and engage new foundations; inform senior leaders and faculty of relevant foundation opportunities, as appropriate; act as stewards of foundation donors; and keep current on trends in the field.

OFR's FY2016 results, achieved in collaboration with the partners noted above, included:

- 53 new gifts and pledges from foundations (14 of which were for \$1 million or more), totaling \$48.1 million, surpassing the FY2016 team goal by 20% and representing an average of \$8 million raised per fundraiser, or \$3.7 million per team staff person;
- 15 presidential foundation visits orchestrated with OFR involvement, including two Gray House dinners;
- 51 senior officers' or deans' visits to foundations; and
- 114 additional foundation visits and significant interactions.
- Significant organizational advances for OFR in FY2016 included:
 - Developing and implementing a new individual goal-setting process;
 - Developing and implementing a new foundation evaluation and qualification system;
 - Developing a systematic process for collaboration with the Office of Philanthropic Partnerships on relationships where there is an individual donor associated with the foundation;
 - Undertaking a thorough review, in collaboration with the Office of Corporate Relations, of MIT's top corporate relationships with an associated corporate foundation and developed strategies for the most significant ones; and
 - Hiring a new assistant director and three new development associates.

Lindley Huey

Executive Director, Foundation Relations

Office of Communications and Events

The Office of Communications and Events supports the Office of 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. Efforts throughout the year for both the Communications and Events sides of the group were aimed toward creating a uniquely MIT public campaign launch event, along with high-quality creative assets, while still serving the individual communications and event planning needs of the office's clients across the Institute.

Early in FY2016, the Communications team gained full approval by senior administration and key volunteers of the Campaign for a Better World brand. In addition, the work invested to gather content, create campaign messaging, and develop a campaign website resulted in the creation of an overall social media strategy for the Institute. Production continued on foundational campaign communications, including

collateral materials related to the campaign themes, white papers, a launch video that showcases MIT's many contributions to contemporary society, and more than 10 films on research projects within the Institute's fundraising priorities. These focused films will be embedded in websites, distributed via social channels, and used in a variety of settings for the balance of the campaign and beyond.

In addition to signature campaign projects, the Communications and Events teams successfully managed business as usual, supporting the planning and execution of a large number of departmental, cultivation, and stewardship events, as well as the design and production of a steady stream of printed and electronic communications and deliverables for the Office of the President, the offices of Leadership Giving and Gift Planning, the Office of Philanthropic Partnerships, and many of the fundraising units across the Schools and departments. This includes the production of printables on campaign themes; development of proposals for nine-figure gifts to the major campaign initiatives; a significant redesign and content reorientation of *Spectrum*, MIT's development publication for prospects, donors, faculty, and staff. The teams also achieved coordination of major announcements about gift agreements and campaign progress, supplied art and editorial direction for presentations to senior leadership and the MIT Corporation, and developed a more robust series of Planned Giving communications. They also conducted continuous maintenance and updating of the MIT Advancement intranet known as the Campaign Toolkit, wrote numerous summaries, proposals, news digests, brochures, analytic reports, and articles, and created high-quality gifts for top prospects.

During FY2016, the Events team collaborated with partners across MIT to execute a variety of donor and prospect events around the world. These included, most notably, events marking the fifth anniversary of the Koch Institute for Integrative Cancer Research; several building dedications, including that of the Morris and Sophie Chang Building (E52), the Samberg Conference Center, and the Samuel Tak Lee Building within the Center for Real Estate; a dinner and reception at the World Economic Forum in Davos, Switzerland; several new West Coast events, including a scholarship brunch, a top-donor MIT Charter Society event, and a Memorial Gifts brunch; a fall Campus Visit; the Corporation Partners Program, now hosted by Bethany Millard, spouse of Chairman Robert Millard; and a series of StartMIT receptions. Beyond these signature events, the team collaborated with development officers to bring many donors together at key stewardship, donor cultivation, and gift-signing events across the country.

Toward the end of FY2016, Resource Development and the Alumni Association began planning to take the campaign launch "on the road" to regional venues in major alumni markets. Six sites have been identified for events in FY2017 (Northern California, Southern California, New York, Washington, DC, Hong Kong, and London). Eleven other regions are under consideration across both North and South America in FY2018.

Whitney Espich
Executive Director, Communications and Events

Donor Relations and Stewardship

The purpose of the Donor Relations and Stewardship (DRS) team is to foster the relationship between MIT and its donors through four key activities: acknowledgement, reporting, recognition, and engagement. The team honors donors' rights to timely acknowledgment of and accurate information about the use of their gifts, and supports Resource Development's mission to maximize long-term gift support to the Institute by helping to ensure donor retention.

In preparation for addressing donor relations and stewardship needs in the public phase of the MIT Campaign for a Better World, the DRS team's FY2016 strategic plan included 26 goals distributed over the four key activities. To complement this internal planning effort, an external consultant was engaged both to educate staff and to offer assessments to Resource Development, the Alumni Association, and the Schools regarding best practices in their donor relations and stewardship work.

Selected DRS accomplishments in FY2016 included work in acknowledgments, reporting, recognition and engagements.

Acknowledgements

As always, the DRS team continues to produce presidential acknowledgement letters annually, preparing more than 600 such letters in 2016.

Reporting

A business analyst was hired in October 2016 for the DRS team to evaluate and address the current state of DRS systems. This important work is under way, with a broad array of needs identified.

Focused attention was given to systems and reporting improvements for selected core fundraising priorities, specifically scholarship reporting. In FY2016, more than 500 donors received scholarship reports with both fund financial information and beneficiary information. An additional 200 received reports with beneficiary information only. In the spring, more than 745 scholarship students were asked to send personal thank-you notes (or videos) to their donors. System improvements, which were significant, included report design improvements and a new online letter submission process, with the option of creating video thank-yous. The student response rate was almost 78%, with 580 letters and videos distributed to roughly 265 donors (compared with 74% in AY2015). The partnerships with RD-IT and the Resource Development Communications were especially important and greatly valued.

For the first time, an impact report was prepared for donors to the MIT Energy Initiative. A second annual impact report was prepared for donors to the Office of Digital Learning, and personalized impact reports were prepared for 130 donors to the Department of Athletics, Physical Education, and Recreation funds and the Priscilla King Gray Center. Stewardship reviews of top donors in the Philanthropic Partnership portfolios were conducted; personalized top donor reports were prepared for the top five donors to the Institute.

Recognition

More than 30 new donors were inducted into the MIT Charter Society, which recognizes donors of lifetime giving of \$1 million and more, and work was begun on a campaign recognition program for donors of \$100,000 to \$1 million. DRS continued to identify donors to be recognized through stories in *Technology Review* and *Spectrum*, and, with RD-IT, developed a tracking system to replace a prior manual process. In collaboration with the campaign office, guidelines were established for recognizing donors through named spaces on campus.

Engagement

In collaboration with the Corporation Office and the Alumni Association, DRS identified individuals to be cultivated through membership on MIT Visiting Committees, of which 15 visiting committees were reviewed in 2016. The annual Scholarship–Undergraduate Research Opportunities Program brunch held on campus, which brings donors together with student recipients, was again extremely well received by attendees, and the new format of “TED Talk”–style presentations worked very well. For the second year, there was a West Coast scholarship brunch, which was also very well received, with the audience of donors and guests totaling 130 (compared with 70 donors and guests in 2015). The MIT Charter Society convened members on the West Coast during President Reif’s February trip to California. In addition, separate stewardship events were held for a range of generous donors and purposes, involving the Bose Research Fellows, the Tang Scholars, the Samberg Center celebration, the Poitras Scholars, the McDermott family, and more.

Kate Eastment

Executive Director, Donor Relations and Stewardship

Information Technology

The RD-IT team provides technical management, maintenance, and support of the central fundraising systems of the Office of Resource Development. This includes the Advance donor information database, which is managed in partnership with the MIT Alumni Association. RD-IT also provides reporting and website and application development, as well as technical support and services, to Resource Development and other fundraising staff throughout the Schools and departments, laboratories, and centers.

In FY2016, the Reporting and Analytics team moved from the Campaign Office under the aegis of RD-IT to enable knowledge transfer and the pooling of resources to address the complex reporting needs of the organization. The desktop support group, RDCompHelp, was expanded to provide nimble, quick turnaround to end-user requests.

During FY2016, the RD-IT staff devoted substantial effort to a number of important projects and processes in preparation for the campaign launch. Development of the public campaign website and a launch registration website were completed,

as were several upgrades to event management systems. A significant amount of ancillary support, including technical support, reporting, list management, and email communications, was provided.

Other projects included the completion of an improved bequest expectancy tracking system, upgrades to the prospect management web forms to improve data collection, and the development of a gift acceptance website for the MIT Foundation UK Ltd. RD-IT also developed a “thank you” data collection website to support scholarship stewardship activity, which incorporated new efficiencies. The electronic Development Office files system (eDO Files) was upgraded with a web interface to support multidocument processing. RD-IT also kicked off a Tableau server implementation project to allow more robust reporting and data visualization for fundraising staff.

In addition to supporting the creation of presentations to senior officers and the Corporation, the team made improvements to the reporting infrastructure by building new reporting tables that will enable quick turnaround for complex reporting for campaign purposes. The team also systematized the tagging of gifts by campaign priority and developed a campaign progress report. Other key projects included enhancements to the campaign calendar as well as a building fundraising report.

On the infrastructure side, Duo Security authentication was rolled out. In addition, all user desktop machines were replaced with laptops to enable remote work while maintaining a high level of security. Simultaneously, enterprise use of Outlook was rolled out to replace use of iCAL and AppleMail as individual user machines were upgraded.

Quantitative results included (in percentage change over FY2015):

- 3158 (+23%): programming and project tasks
- 8251 (+4%): help desk tickets and phone calls
- 54 (+35%): new staff onboards
- 120 (-8%): users trained on advancement systems

William J. Fitzgerald
Executive Director, Finance, Operations, and RD Information Technology

Lisa Donovan George
Director, RD Information Technology

Prospect Identification, Research, and Management

The Prospect Identification, Research, and Management group was involved in many aspects of campaign readiness during FY2016, such as reviewing priority prospects to match them to campaign themes, reviewing old proposals to match them to gifts for

named spaces, scrubbing addresses of more than 2,000 campaign launch invitees, and working with the RD-IT group to define and identify transformational donors.

An important special project this year was the screening of the 2015 Forbes 400, an annual list of the top US billionaires, to determine who might be prospects for the campaign. The group also identified prospects for a number of departmental fundraising projects, including the Media Lab Digital Currency Initiative and Open Agriculture Initiative, and identified major donors to environmental and energy causes. The group prepared briefs for President Reif on important attendees of the SOLVE event and members of former Dean Marc Kastner's Science Philanthropy Alliance.

Extensive training was provided on prospect management tools and policies to new fundraising staff across the Institute, as well as monthly refresher training to existing staff. In addition, several prospect management staff attended training on the data visualization tool Tableau, which will enable vital tracking and reporting to support campaign progress.

As the focus of fundraising efforts has shifted to capturing ultra-high-net-worth unaffiliated prospects, the nature of research has shifted to more qualitative analysis of these prospects' philanthropic passions and how their interests align with MIT activities. More, the office has been undergoing a continuous improvement assessment of its structure, procedures, products and services, which will continue into FY2017.

Overall, the Prospect Identification, Research and Management team produced 1,363 research reports, an 8% increase over FY2015; prepared 2,396 capacity evaluations on prospective donors, a 13% increase over FY2015; identified 1,596 new major gift prospects, a 9% increase over the previous year; and processed 22,473 data entry requests.

Sarah Fernandez

Director, Prospect Research and Management

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 high-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 that are related 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.

During FY2016, several critical roles were filled, including those of executive director of leadership giving, executive director of philanthropic partnerships, and director of the campaign. In addition to supporting the leadership recruiting process, the HR/STM team facilitated reorganizations within these units to enable a focus on frontline fundraising and campaign priorities. HR/STM also collaborated with the Finance and Operations team to develop a budget request to support the success of the campaign while respecting limits on Institute resources, and initiated the review of the Office of Prospect Identification, Research, and Management.

In collaboration with the Alumni Association, HR/STM continued the well-received Managing for Excellence in Advancement program for all supervisors and managers continued, followed by a Managing Across Generations session for those who completed the initial program. Among other programs, a Gallup employee engagement survey was developed and conducted, and an Advancement Exposition was held during the annual Institutional Intelligence Forum (I² Forum), which included information tables and posters hosted by the many units in Advancement across MIT. Additionally, a W98 Diversity and Inclusion Working Group was established as a local effort, modeled on the Institute's Community and Equity Office. In addition to developing a compact statement and electing co-chairs from among its members, the Diversity and Inclusion Working Group launched its programming with luncheon discussion tables at this year's I² Forum. MIT's new online performance development and review process was introduced to Resource Development for the goal-setting portion of the administrative staff reviews; the full process will be implemented for all staff in FY2017.

During FY2016, 49 positions were filled, of which 14 were internal promotions from Resource Development or from 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.

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 both departments, emphasizing collaborative planning and teamwork to meet departmental goals.

During preparation for the FY2017 budget, the team worked with the associate vice president and chief operating officer to allocate resource requests for the balance of the

campaign into recurring needs versus time-limited requirements, and have been full partners in the strategic planning process. In addition, the team adjusted to new budget submission templates requiring extensive detail on positions and expense categories by unit.

One F&O staff member represented Resource Development on the User Advisory Group for the Institute's forthcoming release of Coupa, the Institute's new purchasing and payment system. Both Resource Development and the Alumni Association will participate in the pilot rollout of Coupa early in FY2017.

F&O staff conducted the transition of the employee parking permit and MBTA pass distribution to the new employee self-service site introduced by the MIT Parking and Transportation Office. Because of glitches in the web-based process, this transition required a great deal of troubleshooting and a high level of customer service to the staff of W98.

Senior members of the team continued to work with staff from the Office of the Vice President for Finance, the Recording Secretary's Office, and the Donor Relations and Stewardship group to codify a mechanism for increasing Institute budget relief through the gift stream. As a follow-on project, a subset of this team is reviewing the full projected budget for the campaign, and evaluating metrics to assess the value of the development activities supported by this budget.

On the operations front, F&O staff implemented the final phase of the W98 space utilization plan as units reached full Campaign staffing. This included conversion of several eight-cubicle pods to 12 cubicles, as well as completion of a plan for major renovation of the garden level to accommodate new work groups and expansion of the Information Technology staff. Over the course of the year, the team coordinated 63 office moves, reconfigured or adjusted 159 cubicles and offices, and handled 726 building maintenance requests.

In concert with the Institute's Environmental Solutions initiative, F&O established its own "greening of W98" effort. The W98 Green Committee made great strides with the introduction of fully compostable waste-free coffee service, clean and affordable composting of food waste, compostable and recyclable kitchen products, and the inclusion of Greening Tips in the monthly Campaign Toolkit update. Quarterly emergency preparedness trainings 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 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.

William J. Fitzgerald

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