

MIT Department of Athletics, Physical Education, and Recreation



MIT Men's Basketball  
2010-11 Alumni Fundraising Drive:  
Training Session

*October 2010*



# 1. The "Plan"

---

- Take a few minutes to prepare
  - Familiarize yourself with the MIT Basketball Fundraising key messages and fundraising guidance by reviewing the fundraising handbook, presentations, scripts (all available at <http://web.mit.edu/basketball/fundraising/>)
  - Log on to the online tool to receive, track and manage your call list
    - Today's training will show you how, but online training is also available
    - If needed, make "trades" on your call list by contacting the Steering Committee and the appropriate Core Committee members by email
  - Ask questions! – Please contact other Committee members, the Steering Committee or any of our affiliated MIT representatives who are waiting to help
- Make your contacts, starting tomorrow
  - Step 1: An email has already been sent to all Men's Basketball Alumni, letting them know of the fundraising activity
  - Step 2: We recommend initiating contact with an email, introducing yourself and explaining what we are doing
    - A draft email and short explanatory PowerPoint for alumni are available on the website and the online tool
  - Step 3: Follow up with a phone call
    - A draft script is available on the website and the online tool
  - Step 4: Continue to follow up as required
- Don't forget to make your gift
  - Go online, but also communicate your intended gift to the Steering Committee
  - <http://giving.mit.edu/>
- Track and manage your call list – Check In!
  - Via the online tool
  - Checking in periodically with emails
  - Check in call in January, date TBD



## 2a. The online tool

---

- MIT supplies all fundraising groups with an online tool to help manage prospective donors ("prospects")
- To access the tool, sign into your MIT alumni account at <http://alum.mit.edu/>
  - In the upper left hand corner of the screen, click on "My Volunteer Tools"
  - In the main section of the next page, click on "Prospect Management"
  - Read and accept the privacy policy
  - You're in!!!
- The Steering Committee has pre-populated your prospect list
  - We've done our best to select prospects from around your era, and to keep everyone's list below 12 calls (most are around ~10).
  - Due to a few "holes" in the list, where there are two few committee members in an era, many of your lists may include a few calls that are outside of your era.
  - As you review your list, please contact the committee to facilitate any "trades", particularly if:
    - You foresee a problem with calling one of the prospects on your list
    - Your list is missing someone who you believe that you would be very influential with



## 2b. Online tool: Prospect Management

### CLASS OF 2013 My Prospects

Congratulations! You have selected your prospects for the year. You may choose to view either a summary or a more detailed bio for each prospect. Rated prospects (alumni who may be interested in or capable of making a gift of \$100K+) are identified by the P symbol in the Rated Prospect column. Please wait to hear from your staff liaison before contacting him/her. Current year donors are identified by a \* next to their names.

Want to add more prospects to your list? You can do so in [Prospect Selection](#).

Name		Home City, State/Country	Rated Prospect
Carberry, Peter	<a href="#">view summary</a> / <a href="#">view detail</a>	Cambridge, MA	
Carter, Terese	<a href="#">view summary</a> / <a href="#">view detail</a>	Cambridge, MA	
Coolidge, Steven	<a href="#">view summary</a> / <a href="#">view detail</a>	Cambridge, MA	
Dwight, Carter	<a href="#">close summary</a> / <a href="#">view detail</a>	Cambridge, MA	
Course: 2013 SB - Bachelor Of Science Course 21 - Humanities; Living Group: Student Activity: Concert Jazz, Delta Kappa Epsilon, MIT Tour Guides Sports: Equestrian Club; Var Men's Fencing Company: Kimpton Hotels & Restaurants Profession: Management/Administration			
			<a href="#">close summary</a>
Edmon, Laure	<a href="#">view summary</a> / <a href="#">view detail</a>	Cambridge, MA	
Ford, Scott	<a href="#">view summary</a> / <a href="#">view detail</a>	Cambridge, MA	
Harrington, Patricia	<a href="#">view summary</a> / <a href="#">view detail</a>	Cambridge, MA	
Herbert, Clover	<a href="#">view summary</a> / <a href="#">view detail</a>	Cambridge, MA	

1

Here you can view either a summary or detailed bio of your prospects

2

Prospects being cultivated by Resource Development will have a "P" in this column. Please wait until you speak with your staff liaison before contacting these prospects.

For questions about the tool, please contact Theresa Lee, [\(617\) 252-1491](mailto:teelee@mit.edu)



## 2c. Online tool: Prospect Bios

CLASS OF 2013

My Prospects: Detailed Bio

**Mr Peter Carberry**

Home Address:	993 Roosevelt Circle Cambridge, MA 02139	Business Address:	Account Manager Fidelity Investments
Home Phone:			
Mobile Phone:	617-555-1211		
Email:	peter_ccr@fidelity.com		
Spouse:	Caroline Carberry	Business Phone:	

**MIT Information**

Course: 2013 SB-Bachelor Of Science Course 5 - Chemistry;  
 Living Group: Arts and Technology Group, Nu Delta, WTBS Radio  
 Student Activity: Intramural Crew, Var Men's Heavyweight Crew  
 Sports: Intramural Crew, Var Men's Heavyweight Crew  
 Committee Involvement:

### Giving History

Gift Type	FY2006	FY2007	FY2008	FY2009	FY2010	5 Year Totals
Actual Gift	\$0.00	\$0.00	\$0.00	\$300.00	\$000.00	\$1,200.00
Cross Credit Gift	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Matching Gift	\$0.00	\$0.00	\$0.00	\$0.00	\$900.00	\$900.00

Years of Giving: 2  
 Lifetime Giving: \$1,200.00  
 Largest Annual Giving Total: \$300.00  
 Pledge Balance: \$0.00  
 Reunion Gift Total: \$2,100.00  
 Matching Gift Employer: No

Will your employer match your gift? [Find out now!](#)

### Gift & Pledge Details

Fiscal Year	Date	Amount	Designation	Gift or Pledge
2010	7/15/2008	\$900.00	Graduate Fellowships in the Department of Chemistry	Gift

**1** Biographical information about the prospect.

**2** MIT Information: course, living group, student activities, sports, current or prior committee involvement.

**3** Giving history includes lifetime giving, largest annual gift, pledge balance, reunion gift, and indicates if they work for a matching gift company.

### Gift & Pledge Details

Fiscal Year	Date	Amount	Designation	Gift or Pledge
2010	7/15/2008	\$900.00	Graduate Fellowships in the Department of Chemistry	Gift
2009	10/27/2008	\$300.00	Graduate Fellowships in the Department of Chemistry	Gift

### Ask Amounts

Ask Amount 1: \$0.00  
 Ask Amount 2: \$0.00  
 Ask Amount 3: \$0.00

### Enter Notes

Enter your notes here:

Maximum 1000 characters. This field does not allow HTML tags

[Add Note](#) [Reset](#)

**4** Details past gifts and pledges, including gift designation.

**5** Lists 3 suggested ask amounts.

**6** Here you can record notes on any communications you have with the prospect.

For questions about the tool, please contact Theresa Lee, [\(617\) 252-1491](mailto:teelee@mit.edu)



## 2d. Online Tool: My Dashboard

### CLASS OF 2013 My Dashboard

A message from your Annual Fund staff liaison, Jason Walker:



Thank you for volunteering! Encouraging others to participate as donors and

increasing the number of alumni who give each year demonstrates your commitment to maintaining MIT's excellence.

Participation Matters.

#### My Progress

# Selected Prospects:	12
# Donors:	5
Total \$ Raised:	\$6,650.00

1

#### Committee Progress

# Selected Prospects:	12
# Donors:	0
Total \$ Raised:	\$0.00
# Unassigned Prospects:	0

#### Goals & Progress

Class of 2013 Participation / Goal: 0% / 34%

Annual Fund Participation / Goal: 0% / 36%

#### Class of 2013 Top 5 Performers (Donors / Prospects)

Alexander Bartell: 5/12

2

1

Here you can monitor both your progress and the committee's progress.

2

The committee's top performers are highlighted

For questions about the tool, please contact Theresa Lee, [\(617\) 252-1491](mailto:teelee@mit.edu)



### 3. Making contact – Do's and Don'ts

**Our goals will be best accomplished by each member of the team initiating a personal conversation with their peers in their own words.**

**A script will be provided in a training session in October for those that would like one.**

#### Key messages

- **MIT Basketball has continued to improve in the tradition of MIT**
  - Becoming more competitive both on the court and in the lab
- **This in spite of a flat budget and rising costs**
- **It's time for the alumni to step in and help continue to improve the experience**
- **We're raising a \$220K endowment that will add \$10-12K to the \$38K operating budget**
- **Improvements to coaching, travel, recruiting will mean a lot to the team experience**
- **We need your gift to achieve our goal, and your support against Harvard and on Alumni Day**

#### Do

- Get personal** – Use this as an opportunity to share your own experience with the team and to reminisce with former teammates
- Advertise your gift** - Ask your teammates to join you in a gift appropriate to your era and financial means
- Be concrete** – Try to get a commitment for a specific amount, as well as a sense of when the gift will be made.
- Connect through the current team** - Talk about the recent success of the program and upcoming events. We want participation and involvement, not just a gift
- Be creative** – Competitions within the committee and between eras/teams are highly encouraged

#### Don't

- Disparage the efforts of MIT or DAPER** – the support of MIT/DAPER has been critical to our success to date, and this effort is meant to sustain and improve this experience
- Over-pressure** – "No" is a disappointing, but acceptable, answer. Try to be sensitive to personal situations.
- Overpromise** – 'Special requests' from alumni with their gifts should be referred back to the steering committee



## 4. Call "script"

See page 12 of the Handbook for more detail

---

1. Identify yourself - as a fellow alumnus participating in the men's basketball campaign
2. Establish rapport - This step is the most important. By reconnecting with your fellow alumnus, you can learn more about his current state of mind, significant life events, and overall impressions he has of MIT. You may want to use a discussion about friends, careers, or activities at MIT that you shared in common as lead into the conversation. Ask him to hold dates for upcoming basketball events.
3. State your purpose - Share your enthusiasm. Explore your prospect's interest in making a gift to the basketball campaign, ascertain if this is something that he/she has considered, and what his/her philanthropic priorities are—at MIT or elsewhere.
4. Ask for a specific amount – Suggest an initial amount that reflects past gifts or ask them to match your own contribution. If the person objects to that initial amount, suggest a level of \$110 to commemorate the 110th anniversary of basketball. If that is not possible, ask the person to make a gift at whatever level possible with the ultimate objective of having everyone participate (teamwork!). Be sure to check whether their company offers gift matching, as this may influence their giving level.
5. Listen - Once the solicitation is presented, allow your prospect some time to mull it over and to respond. Remember, whereas you've had time to prepare for the call, this may be the first time your prospect has considered his own gift. If the prospect agrees to the ask amount, direct them to <http://giving.mit.edu> and the Men's Basketball Endowment, and follow up with an email or phone call to ensure that the gift has been committed.



# 5. How to give

---

Online: Go to <http://giving.mit.edu>

- Click on "GIVE NOW"
- Follow the instructions to give
- Designate your gift for:  
**"Men's Basketball Endowment Fund (3653110)"**

By phone: Call 617.253.8270

- Designate your gift for:  
**"Men's Basketball Endowment Fund (3653110)"**

By mail:

- Cash gifts made by check should be payable to MIT, and mailed with your [contribution form](#) or a letter stating your gift's purpose to:
- MIT Annual Fund, Massachusetts Institute of Technology, 600 Memorial Drive, W98-200, Cambridge, MA 02139-4822
- Make sure to note on your check that the gift is designated to:  
**"Men's Basketball Endowment Fund (3653110)"**

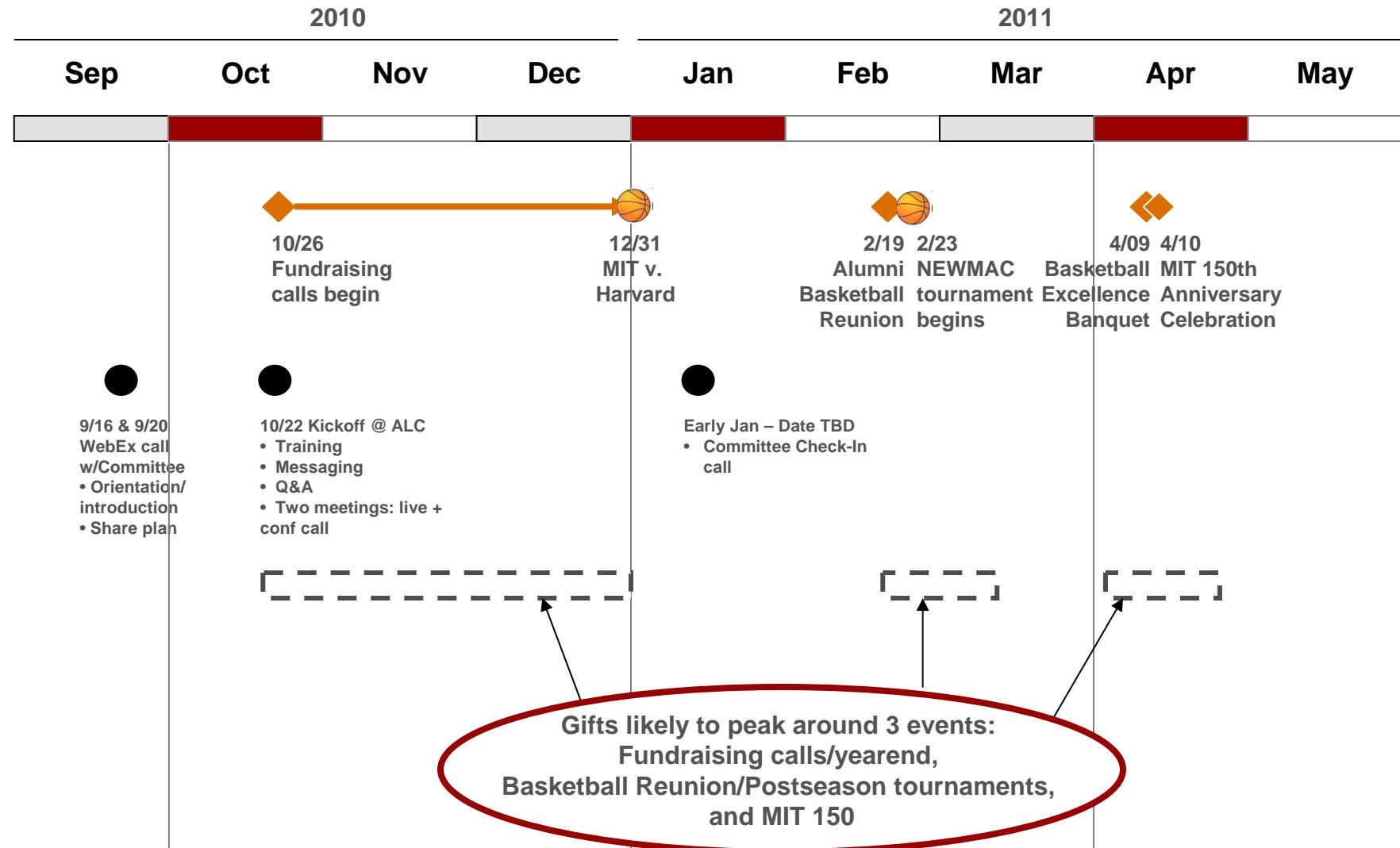
Other ways to give, including bank wire transfers, electronic fund transfers, payroll deductions, and donor-advised funds are described at

<http://giving.mit.edu/ways/mechanics>

Questions? Contact your Fundraising Committee member or the Steering Committee:

**Mead Wyman '62** [gwyman@alum.mit.edu](mailto:gwyman@alum.mit.edu); **Bob Ferrara '67** [rferrara@mit.edu](mailto:rferrara@mit.edu);  
**Indy Ratnathicam '98** [indran@alum.mit.edu](mailto:indran@alum.mit.edu) **+1.617.513.5717**

## 6. Proposed timeline and key dates





---

## GET STARTED MAKING YOUR CONTACTS!

*If you have any questions,  
please don't hesitate to contact the Steering Committee*

**Mead Wyman** [gmwyman@alum.mit.edu](mailto:gmwyman@alum.mit.edu)  
**Bob Ferrara** [rferrara@mit.edu](mailto:rferrara@mit.edu)  
**Indy Ratnathicam** [indran@alum.mit.edu](mailto:indran@alum.mit.edu)