

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. In fiscal year 2018, the [Office of Resource Development](#), in partnership with senior leadership, volunteers, faculty, and staff, reported the best year of philanthropic support in history and set new fiscal-year records for total number of donors and in funding for capital projects. This was MIT's fifth straight year of growth in overall fundraising dollars. As of this writing, the Campaign for a Better World (CBW) stands at \$4.3 billion, or 86% of the \$5 billion goal.

Results in FY2018 are as follows:

New gifts and pledges totaled \$737.3 million, the highest year on record for the Institute. New gifts and new pledge totals for the previous four fiscal years are: \$586.9 million in FY2017; \$522.9 million in FY2016; \$508.4 million in FY2015; and \$453.9 million in FY2014.

Cash gifts and the fair market value of non-cash gifts totaled \$498 million. 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 multiyear pledges to pay. Cash gifts and the fair market value of non-cash gifts for the previous four fiscal years are: \$682.8 million in FY2017; \$427.8 million in FY2016; \$449.9 million in FY2015; and \$380.9 million in FY2014.

Resource Development (RD) supported President Rafael Reif in bringing his vision for the future of MIT to regional events celebrating MIT, our vibrant global community, and our mission to build a better world. Organized in collaboration with the MIT Alumni Association, events in Boston; Chicago; Houston; Miami; Seattle; and Seoul, Korea provided more than 2,600 alumni and friends a closer look at MIT today and showcased research priorities to advance the Institute's mission and serve urgent global needs in the 21st century.

Resource Development arranged for 353 on-campus visits by prospects and donors with 181 faculty, deans, and senior administrators. In addition, Resource Development arranged travel for 77 faculty and senior officers to meet with prospects and donors around the world.

Julie A. Lucas
Vice President, Resource Development

Campaign Office

The Campaign Office leads the planning, development, and implementation of MIT fundraising campaigns. The office monitors and drives activity on pipelines; partners with fundraising units to develop strategies to increase solicitations for unmet needs; promotes awareness of and supports asks for capital, unrestricted, scholarships,

fellowships, and Institute priorities; facilitates senior leadership efforts in support of the CBW and ensures leadership priorities are clearly communicated to RD audiences; ensures volunteers are actively engaged in cultivation, solicitation, and stewardship activities; and develops strong partnerships with schools and departments, labs, and centers to develop campaign-scaled stewardship activities.

The Campaign Office is composed of four teams: Campaign Initiatives, which works closely with the faculty leads for each campaign priority and directs thematic content; Campaign Engagement, which identifies strategies and opportunities for deployment of senior officers and other CBW leaders; Volunteer Management, which supports the activities of the Institute's highest level of fundraising volunteerism—the Corporation Development Committee and the Campaign Leadership Council; and Campaign Operations, which manages policies, procedures, and planning for capital fundraising, develops and implements reporting systems for the CBW, and provides data-driven analyses to guide decisions for MIT's strategic fundraising efforts.

During FY2018 the Campaign Initiatives team worked with faculty leads to create, develop, and execute plans and fundraising strategies for the CBW priorities. The theme Teaching, Learning, and Living was commemorated on November 16 when President Rafael Reif and Christine Reif hosted an event entitled Celebration of the Performing Arts for the opening of the new MIT theater and performing arts building (Building W97). This building replaces the old Rinaldi tile factory facility in Kendall Square, consolidates all theater activities under one roof, and signifies the Institute's strong commitment to the arts as an integral mode of exploration and discovery.

On September 15, 2017, Chairman Robert Millard '73 opened the annual meeting of the Corporation Development Committee (CDC)—the Institute's permanent standing volunteer fundraising organization. CDC members also attended the Alumni Leadership Conference keynote address by Executive Vice President and Treasurer Israel Ruiz SM '01 on MIT's innovation ecosystem. The day continued with sessions on the intersection of human health and computer science with Viterbi Professor of Electrical Engineering and Computer Science Dina Katabi SM '99, PhD '03; a luncheon showcasing student innovations with hands-on exhibits of their projects; a panel of key stakeholders in the Kendall Square Revitalization; and closed with stories featuring students who applied their MIT education to significant community challenges through the Priscilla King Gray Public Service Center.

Throughout the year, meetings of the CDC regional committees continued to engage and educate volunteers on Institute priorities in metropolitan New York, Texas, Boca Raton, Miami, Palo Alto, Menlo Park, Los Angeles, San Diego, Chicago, and New England, as well as London and Hong Kong.

The Campaign Leadership Council (CLC), the ad hoc campaign volunteer group for MIT, executed strategies to engage potential prospects and alumni donors. Council members extended invitations to a number of Institute events this year, such as the Theater Arts building opening and the Bose Fellows fifth anniversary celebration. Eran Broshy '79 hosted two events for alumni and friends at his home in the Boston area. Mark Gorenberg

'76 and Catherin Stickney hosted a number of events to highlight Institute priorities at their home in the San Francisco Bay Area and are also excellent connectors to individual prospects. Charlene '79 and Dirk '75 Kabcenell have worked closely with RD staff on individual engagement strategies and also hosted a reception in their home for alumnae. Alan Spoon '73 hosted a group to tour the MIT.nano building and heard from Vladimir Bulović on the impact the facility will have on the MIT community.

The Campaign Engagement team shares information and identifies strategies and opportunities for deployment of the senior officers and other campaign leaders. Among their numerous activities, staff coordinated 111 requests for meetings and event briefings for Rafael and Christine Reif; conducted briefing sessions on high-level prospects and meetings for the president and chairman; organized the Chairman's Salon dinner series for top prospects highlighting campaign priorities; participated in prospect strategy sessions for the chairman and president; and convened discussions with frontline staff requesting meeting time for their donors and prospects with the president and chairman.

The Campaign Office organized Resource Development's fall and spring campus visit series, MIT Here > Now > Next: Inside MIT's Vision for a Better World. Chancellor for Academic Advancement Eric Grimson PhD '80 hosted select groups of alumni, partners, parents, and friends to curated discussions with Provost Martin Schmidt SM '83, PhD '88, deans, and top faculty to enhance their MIT engagement.

During FY2018, the [MIT Campaign for a Better World website](#) featured the case for supporting MIT's capital projects, offering a detailed look at MIT's plans for dozens of new and renovated structures, from cutting-edge laboratory facilities to dynamic residence halls. Included were building renderings and a campus map illustrating the Institute's vision for a reinvigorated campus and noting locations of new spaces where the MIT community can work, connect, and live.

Training initiatives throughout the year included Campaign Academy and Fundraising Spotlight sessions featuring faculty leads on fundraising needs and new programs. HAcK RD (Harvesting Advancement Knowledge), an internal training program held quarterly for frontline fundraisers and open to all administrative staff in the MIT advancement community, provides opportunities to build skills, share best practices, and increase knowledge of the MIT fundraising landscape. I-Squared, the Institutional Intelligence Forum is held annually to provide members of the MIT advancement community an opportunity to come together and gain insight into current and future Institute priorities and provide answers to the questions that are most frequently asked by our alumni and donors. Finally, the fall and spring All-Advancement Community meetings were held to inform staff in all development, alumni relations, and advancement functions across the Institute about MIT priorities, educate them on issues in the higher education advancement community, and inspire them to do their best work.

Sarah Kruse
Campaign Director

Donor Relations and Stewardship

The mission of Resource Development's Donor Relations and Stewardship (DRS) Office is to foster the relationship between the Institute and its donors through activities that acknowledge, recognize, and report on gifts to MIT and engage donors in the life of the Institute. DRS cultivates donors' confidence, trust, and good feelings about MIT through four foundational principles: acknowledgement, recognition, engagement, and reporting.

The Donor Relations and Stewardship Office oversees the process by which the MIT president and vice president for Resource Development acknowledge charitable gifts from individuals to the Institute. In addition, DRS oversees an internal review process created to ensure all correspondence prepared by Resource Development on behalf of the MIT president is grammatically correct, reflects accurate and comprehensive content, and captures appropriate presidential tone. During FY2018, DRS expanded the scope of letters from Vice President Julie Lucas, which contributed to an increase in the number of gift acknowledgements from 870 to 1,137, or a 23% increase, in the last year. In addition, 133 acknowledgements were sent for gifts to the Class of 1969 Paul E. Gray Scholarship Fund.

The 77 Society recognizes those donors whose single gifts of \$100,000 or more to the Campaign for a Better World are helping MIT to build the future. During FY2018, Resource Development welcomed 132 new member households to the 77 Society with the distribution of welcome letters from the vice president, and the presentation of a hand-sculpted medallion, cast in bronze with nickel plating, featuring 77 Massachusetts Avenue—the society's namesake and MIT's entranceway to the promise of a better world. Donors recognized by the 77 Society were also invited to MIT Better World private receptions, providing MIT's leadership the opportunity to convey personal gratitude for their philanthropy.

The Charter Society, a permanent recognition society, honors donors who have made lifetime gifts to the Institute totaling \$1 million or greater. In FY2018, 39 new donor households were added to the MIT Charter Society.

Chancellor Cynthia Barnhart SM '86, PhD '88 hosted the 2018 Scholarship and UROP Brunch on April 22, 2018. This special annual event honors the Institute's most generous supporters of scholarships and UROP, and brings together these donors, who enable and enrich the MIT experience for undergraduates, with the talented students who are supported by their largess.

Membership on an MIT Visiting Committee is one of the highest forms of volunteer service at the Institute and is one of the ways MIT stewards generous donors and cultivates promising donors. DRS staff worked with relationship managers to curate recommendations and represented Resource Development in membership discussions with 15 department heads in partnership with the MIT Alumni Association and the Corporation Office.

The DRS team expanded the individualized stewardship plans program beyond the Office of Leadership Giving (OLG) and convened individual meetings with relationship managers in the Office of Philanthropic Partnerships (OPP) to discuss their portfolios,

paying particular attention to donors with \$100,000 and over of lifetime giving. The DRS team created 126 individual plans that have 210 associated stewardship tasks. Over the course of the year, relationship managers in both OLG and OPP and their teams were responsible for implementing and maintaining stewardship plans and tasks.

The Donor Relations and Stewardship team actively stewards 629 endowed and expendable scholarship funds and 32 centrally-administered fellowship funds—representing approximately 780 donor and stewardship households and benefiting more than 1,040 undergraduate and graduate students. The team also distributed 743 scholarship reports (547 of which were coordinated with endowment reports); collected and edited 770 scholar bios and 538 scholar thank-you letters and videos; and distributed 37 reports to centrally-administered fellowship fund donors and stewards. Nobody can convey the impact of scholarships and the opportunities they make possible at MIT better than the students who directly benefit from this support. The [“Supporting Tomorrow’s Innovators” page on the Better World website](#) is a video repository created last year featuring MIT undergraduates describing how scholarship support and the MIT experience that it makes possible have shaped their lives.

Jennifer McGrath

Senior Director, Donor Relations and Stewardship

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 world who have the capacity to contribute \$5 million or more. Chief among OPP’s responsibilities is the management of Rafael and Christine Reif’s Resource Development travel and strategy for select donor meetings. In addition, OPP works closely with colleagues in other Resource Development units and across the Institute to identify potential new MIT Corporation members and Institute volunteers and to convene high-level prospect strategy discussions.

In collaboration with colleagues, faculty, and Institute leaders, OPP achieved the following results in FY2018:

- Closed \$305 million in new gifts and new pledges (includes amounts closed in collaboration with the Office of Foundation Relations), contributing meaningfully to the Institute’s record fundraising year
- Coordinated six presidential trips for Resource Development (three domestic and three international)
- Conducted 85 individual presidential prospect meetings and events and executed 322 appointments and events for other senior officers

OPP continued to refine its fundraising strategies for its seven priority regions (Boston, California, New York, Asia, Europe, Latin America, and the Arab World and Turkey), with a focus on MIT Campaign for a Better World priorities.

The team worked closely with the School of Engineering and the Campaign Office to create, track, and update a robust pipeline for the MIT Quest for Intelligence. This Institute-wide initiative was publicly launched on March 1, 2018 and included the participation of key MIT stakeholders. The team secured \$75.5 million in philanthropic support for The Quest.

OPP prioritized philanthropic conversations with donors and prospects around the renovation and renewal of the Institute's capital infrastructure. The team secured \$55.5 million for capital projects.

As it does each year, the team orchestrated MIT's participation in the 2018 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, the OPP team planned and executed trips for numerous other senior leaders and key faculty members. OPP liaised with colleagues across the Institute in preparation for six Better World regional events, helping to recruit speakers and host committee members and briefing President Reif for key prospect interactions.

Arundhati Banerjee

Executive Director, Office of Philanthropic Partnerships

Office of Individual Giving: 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, 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 alumni and parent prospects and donors.

During FY2018, OLG staff and some MIT volunteers (members of the Corporation Development Committee) qualified 397 new prospects, increased activity with parents of MIT students by partnering with the MIT Alumni Association on several MIT parent events, and expanded international major gift fundraising efforts in Europe, South America, and Asia.

All of the above has resulted in growth in new gifts and new pledges of 68% since FY2014. In FY2018, the Office of Individual Giving (including Gift Planning) raised \$201 million in gifts, breaking down as follows:

- Outright gifts and pledges of \$130 million toward a goal of \$70 million
- Life Income Gifts of \$48 million toward a goal of \$20 million
- Bequest Intentions of \$88 million toward a goal of \$20 million

Throughout FY2018, OLG's three regional teams organized 67 senior officer and faculty trips. In addition, more than 30 cultivation events, some hosted by alumni at their homes, featured faculty sharing their insights on the Institute's key research initiatives with donors and prospects: 10 in metropolitan New York and the Southwest, seven on the West Coast, seven in New England and the Midwest, and six on campus, among others.

A sampling of the key events is described below.

During MIT Family Weekend on October 26, 2017, MIT hosted parent leadership donors and prospects at a reception and panel moderated by Professor Sanjay Sarma, vice president for Open Learning, including Professor Vijay Kumar, associate dean of Digital Learning, Professor Laura Schulz of the Department of Brain and Cognitive Sciences, and Professor David Autor of the Department of Economics.

On November 30, 2017, Cecilia Ramos '05 hosted the MIT Women's Networking Event at Lutron Commercial Experience Center in New York, with featured speaker Professor Julie Shah '04, SM '06, PhD '11 of the Department of Aeronautics and Astronautics, director of the Interactive Robotics Group.

Frank Ahimaz '95, Grace Koo '92, and Maria Jelescu '02 hosted an evening with Nobel Laureate Bengt Holmström, the Paul A. Samuelson Professor of Economics, at the Museum of Modern Art (MoMA) on March 15, 2018. Titled, "Incentives and Organization: Beyond Pay for Performance," Professor Holmström's talk centered on multitasking and career concerns and what these considerations imply for organizational design.

Lou Paglia '79, founder of Oakstone Capital, hosted a luncheon for 40 alumni and prospects at MoMA on May 10, 2018. Titled, "Investing in MIT's Future," Seth Alexander, president of the MIT Investment Management Company, discussed management and investment of the Institute's endowment, retirement, and operating funds, and how the reported investment return of 14.3% in FY2017 will ensure that current and future generations of MIT scholars will have the resources to advance knowledge, research, and innovation.

On November 6, 2017, MIT Corporation member Mark Gorenberg '76 and Catherin Stickney hosted a cultivation dinner with President Reif and Provost Martin Schmidt. Longtime CDC member Charlene Kabcenell '79 hosted the Palo Alto segment of the Women in Science and Technology series on May 10, 2018, at which Paula Hammond '84, David H. Koch Professor and head of the Department of Chemical Engineering, discussed her research in the field of polymer engineering and its applications in cancer treatment and drug delivery technologies, and shared her thoughts on attracting young women to engineering.

In the greater Boston area, the Technology Breakfast series—organized by the Office of Individual Giving—serves to keep alumni informed of the companies that have spun out of MIT's entrepreneurial and inventive ecosystem, create and strengthen ties among guests, and foster additional connections with the Institute. This year's featured start-ups included: Vecna Technologies, an IT company developing and deploying automated and

robotic solutions to a variety of sectors, co-founded by Deborah Theobald '95 and Daniel Theobald '95, SM '98; Desktop Metal, addressing the unmet challenges of speed, cost, and quality to make metal 3-D printing an essential tool, represented by its co-founder and chief executive officer Ric Fulop MBA '06; Loci Controls, the leader in automated landfill gas collection, with CEO (and member of MIT's Corporation Development Committee) Peter Quigley '85, and co-founder and senior advisor Melinda Sims SM '09, PhD '13.

Christina Toro

Executive Director, Individual Giving

Office of Individual Giving: 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 from qualified retirement plans. OGP provides support to the work of frontline staff in the offices of Leadership Giving and 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.

During FY2018, the Gift Planning staff adopted a portfolio approach to have direct conversation with planned giving prospects and donors. This approach resulted in significant growth in new gifts and new pledges in the planned giving area since the office first began hiring additional staff in FY2014.

OGP worked with the Office of the General Counsel and the Office of Gift Administration to establish a Donor-Advised Fund to offer as an option to alumni, friends, and supporters of the Institute. This new gift option is available to those who wish to make a gift of \$1 million or more to MIT and have MIT receive at least 50% of the income and principal of the fund.

With the passing of the new tax laws by the US Congress, OGP collaborated with the Office of the General Counsel to hold information sessions and publish fact sheets to help fundraisers across the Institute answer the many questions from their prospects and donors.

In September 2017, OGP welcomed members of the Katharine Dexter McCormick (1904) Society (KDMS) to its annual appreciation brunch. KDMS honors individuals who have chosen to support the Institute's mission through bequests, life income funds, and other planned gift arrangements. Hosted by Provost Martin Schmidt SM '83, PhD '88, the event featured a talk by Professor John Gabrieli PhD '87 entitled "Neurodiversity, Learning, and Education." Michael R. Dornbrook '75, chair of KDMS, was also in attendance and spoke to the guests about his philanthropy and the gift planning program. In April 2018, KDMS staff collaborated with the Alumni Association's Cardinal & Gray Society and the Emma Rogers Society to host a lecture and a lunch. Ernest Moniz, Cecil and Ida Green Professor of Physics and Engineering Systems Emeritus and former US Secretary of Energy, gave a presentation titled "Addressing Global Threats: Climate Change and Nuclear Security."

In partnership with the Communications team, OGP's marketing and communications program continued at an active pace for the second year. [Corridor, a semi-annual newsletter](#), provides insights into planned giving strategies that can help donors meet their financial goals while supporting the mission of MIT. The fall 2017 issue featured stories on Mark Barunstein '69 and Rowena Braunstein's support of undergraduate education and Brad Billetdeaux '72 and Susan Billetdeaux's establishment of both a bequest intention and a charitable remainder trust to benefit MIT, along with their 46 years of giving to the Annual Fund. The spring 2018 issue featured profiles of Aniruddha Chitale ScD '68 and Suzana Naik; Sarangan Chari SM '90 and Gina Spagnoli; and Bonny Kellermann '72, and how they have directed their philanthropy through their selected planned gift choices. In addition, an interview with Executive Vice President and Treasurer Israel Ruiz SM '01 explained how planned gifts support MIT's education and research mission. Other targeted communications during the year included Thanksgiving and birthday cards, annual fund gift mailers, and a gift annuity letter.

OGP giving activity was exceptionally strong for FY2018, culminating in 104 planned gifts totaling \$48.1 million including:

- 27 new charitable remainder unitrusts totaling \$41.1 million
- 62 charitable remainder unitrust additions totaling \$6.1 million
- 13 charitable gift annuities totaling \$890,754
- 1 pooled income fund of \$23,296
- 5 planned gift pledges totaling \$975,000
- 1 Donor-Advised Fund contribution of \$1.5 million
- 14 outright gifts \$1.5 million
- 1 outright pledge of \$25,000
- 143 new Katharine Dexter McCormick (1904) Society members
- 40 bequest intentions credited totaling \$88.8 million and 32 outside managed trusts credited totaling \$14.3 million
- 58 realized bequest receipts totaling \$6.9 million
- 1 testamentary trust set up for receipt of funding from donor estate after their passing

Amy Goldman
Senior Director, Gift Planning

Office of Foundation Relations

The Office of Foundation Relations (OFR) identifies, cultivates, and engages foundations to maximize support to the Institute, works to identify foundation opportunities aligned with Institute priorities, and develops strategies for successful approaches. In FY2018, OFR continued to place emphasis on foundations with goals aligned with the thematic MIT campaign priorities, working closely with the Campaign Office on strategies for these discussions, as well as on other high-priority special projects. The team placed its

main focus on the highest yield opportunities, prioritizing discussions with potential to lead to \$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. OFR staff worked collaboratively with the Office of Philanthropic Partnerships on dually managed relationships (individuals and their philanthropic organizations), and with colleagues in other units in Resource Development; the Office of the President and other senior leaders; 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/Industrial Liaison Program; and the Technology Licensing Office.

During FY2018, OFR staff were involved in driving strategy, staffing senior officer interactions, and playing lead roles on numerous significant foundation approaches. OFR staff organized visits to 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 FY2018 key results, achieved in partnership with colleagues, faculty, staff, and senior leadership, included the following:

- 73 new gifts and pledges (19 of \$1 million or more), totaling \$86.7 million; FY2018 was OFR's best year to date with a 27% increase over OFR's previous most successful year (FY2017)
- 8 presidential foundation visits with OFR involvement
- 56 senior officer and dean foundation visits with OFR involvement
- 97 additional foundation visits and significant interactions

Significant organizational advances in FY2018 included the following:

- Refined goal setting process for foundation relationship managers
- Revised and updated Foundations section of RD Prospect Management Policy
- Formalized successful process in place for collaboration with the Office of Philanthropic Partnerships on dually managed relationships, where there is a living unaffiliated donor associated with a foundation
- Partnered with the Office of Communications on two major retrospective stewardship books, for the Lemelson Foundation and the Smith Family Foundation
- Presented as an office at the internal Resource Development training program: HAcK RD

Lindley Huey
Executive Director, Foundation Relations

Office of Communications and Events

The Office of Communications and Events supports the important work of cultivating and stewarding current and prospective donors to MIT through integrated communications and highly tailored engagement strategies. The office's efforts throughout the year were aimed toward supporting regional campaign events around the world and serving the individual communications and event planning needs of partners across the Institute. The office focused on strengthening collaborative relationships with MIT's Office of the President, Alumni Association, Office of the Vice President for Communications, MIT News, the five schools, and various departments, labs, and centers.

Throughout the year, the Communications and Events team reinforced the Institute's fundraising priorities by taking the Campaign for a Better World to five alumni markets for its second year of regional road shows in Boston, Seattle, Houston, Miami, and Chicago. In addition, the team supported an alumni engagement-focused version of the road show event in Seoul, Korea. To help gauge the effectiveness of these activities, the office collaborated with the Information Systems team and the MIT Alumni Association to develop engagement metrics. Using data on attendance and giving, plus results from attendee surveys, the analytics revealed increases in individual giving and engagement with the Institute following road show attendance.

The office's Communications and Design teams produced a range of individualized proposals, one-pagers on fundraising priorities, and a variety of pamphlets, brochures, fact sheets, and online stories and videos to support projects such as the Kendall Square Initiative, including the MIT Museum; residential life at MIT; and the Aging Brain Initiative; as well as materials to steward and thank donors. Members of the Communications and Design teams were also part of the core working group for the creation and launch of the MIT Quest for Intelligence, helping to write the vision for the initiative and playing a primary role in designing and producing print and digital collateral for the Quest launch event.

In addition, the Design team worked with a cross-functional team to develop the Institute's installation at HUBWeek, which celebrated the intersection of art and technology at MIT through student-created murals that "came to life" for viewers using the augmented reality mobile app Artvive.

The office also published three issues of [Spectrum](#), which connects alumni, donors, and friends to MIT's vision, impact, and exceptional community. Donors and faculty receive the issue in print, and all alumni and students receive an email announcing each new issue. The fall 2017 issue presented a special section, "Questions," ranging from investigations in science and engineering to major societal issues such as how governments shape the course of innovation and how we can transform 21st-century education. The winter 2018 issue "Pathways to Policy" featured MIT projects that find avenues for collaboration with government, business, and other organizations that can translate research findings into widespread action. The spring 2018 issue showcased the theme of "Repair" with stories on Feng Zhang's new CRISPR-based RNA editing technology, National Design Award-winner Anne Whiston Spirn's 40-year urban restoration project in West Philadelphia, and cross-disciplinary efforts to help Caribbean

islands with post-hurricane rebuilding aimed at long-term resilience. This issue also included a special section on the launch of the Quest for Intelligence.

Overall, the office's Events team planned and implemented 91 high-level donor events on campus and around the world, including the Corporation Development Committee's annual meeting and 13 regional meetings; President Reif's dinner and reception at the World Economic Forum in Davos, Switzerland; the Katharine Dexter McCormick (1904) Society's annual appreciation brunch; Family Weekend events for parents of incoming first-year students; the Energy Advisory Board Presidential dinner at Gray House; the annual Scholarship and UROP Brunch; receptions for the Bose Fellows and Lemelson-MIT Prize winners; a Freshman Summer Send-Off hosted by John SB '88 and Stella Seo; the opening of the new Music and Theater Arts building; a West Coast StartMIT event; numerous campus visits for the Office of Philanthropic Partnerships with highly rated donors; fall and spring versions of the MIT Here > Now > Next program attended by cohorts of major donors; the Corporation Partners Program; and many signing ceremonies and receptions for high-level donors, prospects, and other visitors.

The Communications and Events team looks forward to another strong year of collaboration with Institute partners to produce exceptional, strategic work that fosters engagement and support of MIT's mission and philanthropic priorities.

Carrie Johnson

Executive Director, Communications and Events

Strategic Information Management

The Strategic Information Management (SIM) unit was created early in FY2018 to build on the synergies that exist across the RD-Information Technology and the RD-Prospect Development departments. This merger presents unique opportunities to collaborate in the areas of business intelligence, modeling, information delivery and related processes, as well as optimizing portfolios and enhancing research partnerships with fundraisers. SIM partners with colleagues to develop lasting prospect relationships and provides critical processes and technological infrastructure to enable fundraising operations, communications, and donor relations. As a shared steward of MIT's fundraising institutional memory, SIM partners with the MIT Alumni Association on data governance and ensures data integrity.

In order to engage program managers and senior leaders in critical decision making regarding the long-term road map for information management, in FY2018 SIM established a Strategic Information Priorities Committee of key stakeholders to categorize requests strategically, provide regular progress updates, and make progress on backlog and timelines.

The following list highlights some key projects accomplished by SIM in FY2018:

- Developed a donor pipeline tool that enables RD, as well as schools and departments, to manage current proposals and forecast the philanthropic pipeline based on likelihood to give, wealth rating, expected gift amount, and many other critical parameters.

- Convened focus groups consisting of fundraisers and managers, as the initial step in developing (in FY2019) an extensive portfolio analysis tool that includes critical activities to be performed by fundraisers, portfolio demographics, progress toward goals, and other key metrics to support fundraiser productivity.
- Utilizing multiple business analytics tools, SIM enhanced our ability to capture a greater understanding of prospect inclination in addition to capacity. Using this enhanced understanding of prospect inclination, the SIM team identified 930 new prospects and 2,000 upgraded prospects.
- During FY2018, more granular donor capacity ratings were applied to differentiate prospects at the top of the giving pyramid and additional emphasis was placed on identifying prospects most likely to support core needs, including scholarships and financial aid, unrestricted dollars, and specific capital projects.
- Partnering with fundraising managers, SIM streamlined portfolio assignment processes and introduced a regular portfolio review process to maximize our current pool of assigned prospects and ensure maximum fundraising productivity.
- In collaboration with MIT's Offices of General Counsel and Risk Management, implemented processes to help us comply with the new General Data Protection Regulations (GDPR) in the European Union, including data governance, responding to "right to data" and "right to be forgotten," and posting an updated Privacy Statement. SIM also worked with MIT internal audit to apply additional security to the MIT Alumni database of record.
- Supported all data requirements for the MIT road show and other campaign initiatives, as well as presidential and other MIT escalation messaging regarding the MIT Quest for Intelligence and similar announcements; also developed a tool to measure campaign road show impact, analyzing attendee engagement and giving pre- and post-events
- Began utilizing AI tools to review our unstructured data sources to potentially identify prospect interests, relationships, and eventually provide governance tools in support of GDPR and other potential privacy regulations.
- Initiated a closer partnership with the MIT Alumni Association and the Sloan External Relations office to review vendors with potential for consolidation or more innovative options, and to align "buy vs. build" technology options with MIT's IS&T road map

Other achievements for FY2018 included:

- Performed 18,013 prospect updates
- Completed 4,678 IT service and programming requests
- Completed 1,178 briefings plus 3,996 contacts (trip support)

Deborah M. Cunningham
Executive Director, Strategic Information 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 quality talent, ensure their strategic engagement, and guide their performance and professional development in support of MIT's advancement goals. The HR/STM team supports the work of all program areas within Resource Development relative to talent management including: staffing and retention, employee engagement, performance management, employee relations, diversity and inclusion, professional development for management and staff, compensation, and rewards and recognition. In addition, HR/STM facilitates all organizational changes within RD and drives the effort to create a comprehensive talent management strategy for the campaign and beyond.

During FY2018, 39 positions were filled, of which 16 were internal promotions from either Resource Development or elsewhere at MIT. Among these filled positions were the critical roles of executive director of Communications and Events, executive director of Strategic Information Management, and executive director of Human Resources/Strategic Talent Management.

With the hiring of a new executive director, HR/STM took the opportunity to codify and document consistent standards for promotions, merit increases, and assignment of job titles in conformity with Institute guidelines. The team also documented HR procedures and policies in a new reference guide for frontline fundraisers produced by the Campaign Office.

In partnership with the MIT Alumni Association (AA), several major programs were rolled out to both RD and AA staff. This included MIT's Haven training program on sexual misconduct, how to intervene against it, and how to respond effectively to someone affected by it. Beyond MIT's offering, RD and AA conducted additional sexual misconduct training customized to the advancement business, which provided attendees with a framework through which to navigate these conversations with alumni, donors, colleagues, and friends, data about sexual harassment and violence and its impact, the ways in which sexual violence shows up in our work as advancement professionals, and practical ways employees and managers can contribute to a culture of safety and respect.

The teams executed the second annual talent review process to enable data-driven talent management decisions. Both departments used the Institute's Performance Development and Review tool for goal setting, midyear check-ins, and year-end performance appraisal and progress toward goals. Other co-organized activities included the annual the Gallup Employee Engagement survey for the fourth year in a row, the annual Administrative Professionals appreciation luncheon, quarterly New Employee Welcome Receptions, a series of Health and Wellness sessions, membership in CASE (Council for Advancement and Support of Education), and meetings of the AA-RD Diversity and Inclusion Working Group.

Resource Development's HR/STM unit sponsored a series of Stay Interviews to help managers understand why employees stay and what might cause them to leave their positions in Resource Development. The data collected will help identify early

warning signals of retention issues and help with insights in employee preferences and motivations. Through Resource Development's Rewards and Recognition program, 21 individuals received spotlight awards, and four groups and eight individuals received Infinite Mile Awards.

Ellen Gilmore

Executive Director, Human Resources and Strategic Talent Management

Resource Development and Alumni Association Finance and Operations Team

The Finance and Operations (FO) team is a shared services unit that supports all program areas within Resource Development and the MIT Alumni Association with strategic allocation and management of financial resources, budget reporting and analysis, administrative operations, and facilities management. The FO team continued to provide responsive and effective service to all units in both departments, emphasizing collaborative planning and teamwork to meet departmental goals.

During FY2018, senior members of the FO team supported the associate vice president and chief operating officer of Resource Development in managing the FY2019 strategic planning and budget allocation process. In addition, FO collaborated closely with RD's new executive director for HR/STM to codify processes including a more structured approach to tracking and allocating open positions across RD. The FO team also provided key support to the on-boarding activities of the new CEO of the Alumni Association.

Senior members of the team worked with staff from the Vice President of Finance Office and the Office of the Recording Secretary to create a Priority Gifts Dashboard and to perform quarterly updates of the Campaign Cost and Gifts Forecasting Dashboard. The executive director presented the Campaign Dashboard to the Education Advisory Board's Coast-to-Coast Consortium Group. The senior associate director served as vice chair of AACII (the Administrative Advisory Council), an Institute-wide group that provides a formal mechanism for administrative areas contemplating change. The coordinator for finance and operations was accepted into the Susan Vogt Leadership Fellows Program, sponsored by the Boston Consortium for Higher Education.

On the Operations side, FO continued space planning and allocation work to ensure ergonomically friendly and appropriate workspace needs, in both Building W20 and Building W98, including installation of business intelligence setups, office reconfigurations, small- and large-scale paint work, and so on. Over the course of the year, the team coordinated 38 interoffice moves, adjusted 85 offices and cubicles, and handled 778 building maintenance requests. Concurrently, major HVAC unit replacement work, the completion of the Building W98 facade repair project, and closing out the final details of the Tech Caller move generated continuous project work. The Building W98 Green team continued encouraging composting, recycling, and other greening tips on the advancement intranet, the Campaign Toolkit. FO collaborated with both HR/STM teams to offer quarterly emergency preparedness trainings to new staff as well as refresher classes for current staff.

On the finance side, the FO team successfully partnered with both senior teams in the AA and RD to close the fiscal year with operating surpluses, which were returned to MIT's Budget Office. The FO team coordinated the collection of data and questionnaires from all Advancement offices across the Institute for MIT's annual IRS Form 990 submission, as well as the Council for Aid to Education's Voluntary Support of Education questionnaire. 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 and Operations