

## 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 this 10th and final year of the [Campaign for a Better World](#), the [Office of Resource Development \(RD\)](#), in partnership with senior leadership, volunteers, faculty, and staff, reported a robust year of philanthropic support. Despite geopolitical challenges and economic uncertainties due to the pandemic, MIT marked the seventh straight year of surpassing \$500 million in FY2021 and exceeded the \$6 billion goal of the Campaign by \$237 million or nearly 4%. These achievements are the culmination of efforts by faculty, senior staff, and the over 400 professionals in the MIT Advancement community who are helping to engage alumni and friends in the work of fueling education, research, and innovation at MIT to make a better world.

Results in FY2021 are as follows:

New gifts and pledges (NGNP) for FY2021 totaled \$564 million. New gifts and new pledges include outright cash gifts and new multiyear pledges to be paid. Totals for NGNP in the previous five fiscal years were:

- FY2020: \$542 million
- FY2019: \$931 million
- FY2018: \$728 million
- FY2017: \$568 million
- FY2016: \$516 million

Cash gifts and the fair market value of noncash gifts for FY2021 totaled \$562 million. Cash gifts comprise cash and the fair market value of noncash gifts received in full during the year. Totals for cash gifts and the fair market value of noncash gifts for the previous five fiscal years were:

- FY2020: \$500 million
- FY2019: \$612 million
- FY2018: \$498 million
- FY2017: \$683 million
- FY2016: \$428 million

Campaign giving was distributed across a variety of constituencies and geographic locations, with 54% of the total coming from alumni, 23% from friends and parents, 13% from foundations, and 9% from corporations. Domestic donors comprised 79% of the total. We honor every gift received and value the engagement of all who responded to MIT's outreach efforts.

Resource Development rose to the challenge and opportunities presented by the Covid-19 pandemic to maintain a high level of engagement with donors and prospects. Concerned alumni and friends gave over \$4.6 million to support MIT's efforts to address this public health crisis through the special funds created last year for emergency aid, research, and student life and wellness. RD helped alumni and friends stay connected to the Institute through creative virtual settings, including the final year in the series of regional Campaign roadshows featuring insights from Institute leaders, faculty, and alumni. On behalf of President L. Rafael Reif, Resource Development also produced the Institute-level MIT Forefront virtual discussion series that brought together business and policy leaders and MIT experts for the following presentations: "From Research to Action: Work of the Future," "Disrupting the Inequalities of Covid-19 in Work and Health Care," and "Addressing Climate and Sustainability through Technology, Policy, and Business Models." Resource Development created a new e-newsletter for top-level donors and prospective donors, as well as audiences who are highly engaged with the Institute, highlighting MIT's continued work to tackle a vast array of complex problems presented by Covid-19. Details of these and other efforts during FY2021 are described in the following sections from the executive directors of each unit of RD.

During FY2022, Resource Development will be guided by our six overarching goals:

- Raise at least \$500 million in new gifts and new pledges
- Sustain current and develop new donor constituencies with a focus on new donor qualification and building the pipeline for ongoing and future fundraising initiatives
- Continue to invest in staff by:
  - Preparing for a phased return of staff to Building W98, implementing tenets of the Work Succeeding Initiative
  - Engaging and retaining staff through professional development opportunities
  - Fostering a culture characterized by diversity, equity, inclusion, and belonging
  - Supporting MIT's mission and exemplifying our RD mission, vision, values, and core competencies in our day-to-day work
- Implement approved plans for campaign closure and related activities; develop and finalize post campaign analysis to inform and refine fundraising and stewardship strategies
- Collaborate with campus partners and advancement units across MIT to enhance our ability to share information by applying significant technology upgrades along with enhanced information governance
- Engage in special projects at MIT at the request of leadership or to advance the Institute's mission or brand

**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, primarily non-alumni friends, from around the globe who have the capacity to contribute \$5 million or more. Chief among OPP's responsibilities is the management of President Rafael Reif's and Christine Reif's Resource Development travel, correspondence, and strategy for select donor meetings. OPP also coordinates Resource Development travel for other MIT senior leaders, including deans, vice presidents, and the provost. OPP works closely with faculty and staff to identify potential new MIT Corporation members and Institute volunteers and coordinates high-level prospect strategy discussions with advancement colleagues from across the Institute.

OPP continued to refine its fundraising strategies with a focus on helping MIT to surpass the \$6 billion goal of the MIT Campaign for a Better World and directing effort toward funding for the Metropolitan Storage Warehouse (Building W41), the new Music Building, and other capital projects; the MIT Stephen A. Schwarzman College of Computing; the Climate Action Plan; and professorships, fellowships, and scholarships. In collaboration with colleagues, faculty, and Institute leaders, the team achieved the following results in FY2021:

- Closed \$145 million in new gifts and new pledges (includes amounts closed in collaboration with the Office of Foundation Relations)
- Closed \$24,310,252 for building construction funds and \$12,750,000 in additional support for buildings (including exhibitions) for the following projects: the Student Wellbeing Lab, the MIT Museum at Kendall Square, the Music Building, the Earth, Atmospheric and Planetary Sciences Pavilion and Green Building renovation, the Edgerton Center Electronics Lab, the MIT Alumni Welcome Center, and the Robert A. Swanson (1969) Biotechnology Center of the Koch Institute for Integrative Cancer Research
- Coordinated more than 160 prospect meetings for senior leaders and faculty
- Collaborated with the Prospect Development team to identify prospects and pathways, including more than 125 prospects for the Climate Action Plan
- Invested significant effort in the professional development and wellbeing of the team during the pandemic

Throughout the year, the team planned and executed a number of high-level events as described below.

- OPP organized a virtual roundtable series to provide MIT's closest friends and philanthropic allies with direct access to key MIT researchers working to rapidly develop solutions in the fight against Covid-19 and climate change.
  - On July 21, David Siegel PhD '91 co-chairperson of Two Sigma, and Anantha P. Chandrakasan, dean of the School of Engineering and Vannevar Bush Professor of Electrical Engineering and Computer Science, hosted "MIT and Covid-19: Engineering a Robust Medical Future."

- On October 27, “Pathways toward a Pandemic-Resilient Future,” hosted by Kiran Mazumdar-Shaw, founder and chair of Biocon, and Simon Johnson PhD ’89 and Ronald A. Kurtz (1954) Professor of Entrepreneurship, featured speakers’ thoughts on how to design public health systems that can meet the challenges of future pandemics.
- At “Accelerating Solutions Toward a Net-Zero World: MIT, Innovation, and Climate Justice,” on November 30, former US Secretary of Energy Ernest Moniz led a discussion with four of his fellow MIT professors about accelerating research in a way that matches the urgency of the climate crisis, how countries must collaborate on the policy front, and how we can create a robust ecosystem to implement innovative solutions.
- As part of Community Jameel’s effort to build a stronger community of Jameel Scholars on campus, OPP organized the virtual Jameel-Toyota scholars welcome luncheon. The event, held on November 12, was attended by Mohammed Abdul Latif Jameel ’78 and other members of the Jameel family, and was hosted by Chancellor Cynthia Barnhart SM ’85, PhD ’88 with remarks by President Reif.
- On November 23, the annual Siebel Scholars virtual event provided an opportunity for Thomas M. Siebel to meet with the current MIT Siebel Scholars and learn about their research, as well as with senior leaders including President Reif and Dean Chandrakasan, who hosted the event.
- On May 19, President Reif and chancellor for Academic Advancement W. Eric L. Grimson PhD ’80 met virtually with Irwin Jacobs SM ’57, PhD ’59 and Joan Jacobs and their fellows to talk about the students’ current activities.

In September 2020, MIT launched the MIT Forefront virtual event series to bring together scientists, engineers, and researchers from MIT and beyond with influential business and policy leaders to share expertise and explore new strategies to inform policy and spur action. In collaboration with the RD Communications and Events team, OPP contributed to the organization of the following three events:

- “Disrupting the Inequalities of Covid-19 in Work and Health Care,” September 24, 2020
- “From Research to Action: Work of the Future,” February 19, 2021
- “Addressing Climate and Sustainability through Technology, Policy, and Business Models,” April 21, 2021

OPP compiled briefing materials to prepare President Reif for his participation in select virtual sessions during the Davos Agenda, in January. This week of global programming convened leadership panels and impact sessions focused on one of five domains addressing critical issues toward a robust recovery from the Covid-19 pandemic: designing cohesive, sustainable, and resilient economic systems; driving responsible industry transformation and growth; enhancing stewardship of our global commons; harnessing the technologies of the Fourth Industrial Revolution; and advancing global and regional cooperation.

The team supports the president with briefings in preparation for presidential-level donor meetings, gift acknowledgement letters and emails, and other targeted communications, and generated more than 560 letters, briefings, and other communications on behalf of President Reif during FY2021.

During FY2022, OPP will:

- Focus on Institute priorities for fundraising: fellowships; capital; diversity, equity, and inclusion; unrestricted; Climate Action Plan; MIT Schwarzman College; and life sciences and health
- Focus on expanding current portfolios
- Develop and execute a robust corporate fundraising strategy
- Focus on stewardship of MIT's most generous donors
- Capitalize on presidential travel to celebrate the end of the Campaign, to steward existing top Campaign donors, and to bring them back into the cultivation cycle
- Develop customized, hybrid, virtual/in-person engagement plans for prospects and donors
- Engage in special projects at MIT at the request of leadership or to advance the mission of MIT or the MIT brand

**Arundhati Banerjee**

**Executive Director, Office of Philanthropic Partnerships**

### **Office of Individual Giving**

The Office of Individual Giving (OIG) comprises two major units: The Office of Leadership Giving (OLG) and the Office of Gift Planning (OGP). As of June 30, 2021, several noteworthy results from the Campaign for a Better World highlight the strong fundraising success posted by OIG.

Key results from the Campaign:

- OIG contributed 33% of the new gifts and pledges for the overall Campaign total.
- OIG contributed 50% of the new gifts and pledges total raised by Resource Development in FY2021.

OLG cultivates and stewards alumni, parents, and friends capable of making gifts primarily in the range of \$100,000 to \$5 million. OLG team members understand and leverage both the art and science of relationship building in order to engage prospective donors and raise funds for the Institute.

Collaborative by design, OLG regularly partners with colleagues in Resource Development, the MIT Alumni Association, school development offices, the Office of the

President, and the Office of the Chair of the Corporation, as well as deans, department heads, and volunteers from around the world.

OGP engages donors in philanthropic conversations involving life-income gifts, including charitable remainder trusts (which provide income to the donor and then to an MIT designation upon its termination), charitable gift annuities (which simultaneously provide retirement income and fund an MIT designation), and pooled income funds, as well as donor-advised funds (which allow the donor to create a charitable account maintained by MIT from which distributions may be made to MIT as well as other charitable organizations), bequests, gifts of complex assets, and outright gifts and pledges. The team is involved in gift discussions at all levels, from larger annual fund gifts to OPP-level donations. OGP also works with donors and their advisors on structuring testamentary gifts through wills, living trusts, and designations from qualified retirement plans. The team provides support to the work of frontline staff in the offices of Leadership Giving and Philanthropic Partnerships; Annual Giving in the MIT Alumni Association; the five schools and college; and departments, centers, and institutes throughout the MIT campus. In addition to supporting frontline gift officers with questions from their prospects and donors through conversations, information sessions, and fact sheets, the Gift Planning staff works directly with a portfolio prospects.

### **Leadership Giving**

Despite the Covid-19 pandemic, OLG staff were highly productive and effective in their fundraising efforts. Faced with the inability to travel or meet donors in person, OLG creatively leveraged technology and shifted its approach to outreach and organization in order to continue its most important work: relationship building. This effort also included development of appropriate quantitative metrics for “fundraising during a pandemic,” creation of a qualification working group with three gift officers, and initiation of a “squad leader” program to lead a group of relationship managers in mentoring development assistants. A solid emphasis on consistent processes and best practices used across the entire team continued from prior successful years, including the rigorous setting of detailed individual goals for prospect management, and the mapping out of nuanced top prospect strategies.

As a result, during FY2021 the three regional teams filed 1,933 contact reports, recorded 12,909 touch tasks and solicited 198 gifts. New gifts and new pledges of \$85 million exceeded the original \$75 million goal by 13, marking the 10th year in a row that OIG has exceeded its NGNP goal.

Despite the travel and social distancing restrictions of the Covid pandemic, OLG’s three regional teams organized a surprisingly robust set of cultivation events featuring faculty sharing their insights on the Institute’s key research initiatives with donors and prospects. A sampling of the key events is described below.

The Resource Development Parents Leadership Circle (PLC) is a group of committed parents who build parent connection, engage in opportunities to learn about MIT research and student life, and impact MIT through philanthropy. The PLC kicked off MIT Family Weekend on October 22 with an exclusive virtual gathering: “Bringing the MIT Campus to You: Metropolitan Warehouse and Music Building.”

Edie Goldenberg '67 life member emerita of the MIT Corporation, member of the MIT Political Science Visiting Committee, and professor of political science and public policy at the University of Michigan, hosted a webinar on September 16 titled "Threats to Healthy Elections." Organized both by OLG and the School of Humanities, Arts, and Social Sciences, the event centered on both explicit political interference and severe disruptions caused by Covid-19 as well as the impact of virulent misinformation campaigns that threatened the 2020 election and the American democratic process.

Chancellor for Academic Advancement Eric Grimson hosted a Technology Breakfast on October 1 in virtual format featuring Cambridge Mobile Telematics, which has developed a platform that uses smartphone sensors to detect risky driving behaviors. Co-founders Hari Balakrishnan, chief technology officer and the Fujitsu Professor of Computer Science and Artificial Intelligence at MIT, and Samuel Madden '99, SM '99 chief scientist and the Distinguished Professor of Computing at the Schwarzman College of Computing, described the platform.

A private discussion for a select group of prospects and donors on October 15 featured Seth Alexander, president of the MIT Investment Management Company, titled "Global Markets and Endowment Investing at MIT." The virtual event was moderated by Dean Melissa Nobles.

On November 4, dean of the School of Engineering Anantha Chandrakasan and professor of aeronautics and astronautics (AeroAstro) Daniel Hastings SM '78, PhD '80 hosted the AeroAstro MathWorks Day honoring Jack Little '78 and his company, MathWorks. MIT faculty members from Aeronautics and Astronautics and the Computer Science and Artificial Intelligence Laboratory (CSAIL) presented along with MathWorks employees. Following the presentations, guests joined virtual breakout rooms with the faculty to further discuss the information shared in the meeting.

Charlene C. Kabcenell '79 2021 president of the MIT Alumni Association, life member of the MIT Corporation, and founder of the MIT Women in Science and Technology series, hosted the first virtual event in the series on November 18. Moderated by Erika Ebbel Angle '04, CEO and co-founder of Ixcela, the event featured remarks by Diane Greene SM '78, newly elected chair of the MIT Corporation, and a talk by Dina Katabi SM '99, PhD '03 the Andrew (1956) and Erna Viterbi Professor of Electrical Engineering and Computer Science, and director of the MIT Center for Wireless Networks and Mobile Computing. Professor Katabi presented her Emerald device, which analyzes the wireless signals in the environment using artificial intelligence to infer people's vital signs, sleep, and movement.

Parents Nicole and Jan Brzeski P '23 convened a small group of philanthropic-minded MIT parents and guardians in virtual format to hear an update from the Department of Athletics, Physical Education, and Recreation (DAPER). Department head and director of Athletics G. Anthony Grant discussed the state of DAPER during the pandemic and spoke to the steps MIT is taking to support all MIT students.

In FY2022, OLG will maintain focus on the central Institute priorities of scholarships, professorships, and capital; continue to strengthen outreach to MIT parents and guardians and support the funding priorities of DAPER; and emphasize donor stewardship. The group will continue collaborations with school and departmental fundraising staffs; sustain a strong pace of qualifications; work with the Corporation Development Committee (CDC) office to refocus the activities of CDC volunteers as new fundraising priorities and volunteer roles are defined. Additionally, OIG staff will support several Diversity, Equity, Inclusion, and Belonging (DEIB) initiatives and partner with the Human Resources and Strategic Talent Management team to incorporate specific competencies into individual employee goals. Despite the potential challenges presented by the ongoing pandemic, the team is excited to once again meet, and possibly exceed, its goals in service to the Institute at large.

**Christina Toro**

**Executive Director, Office of Individual Giving**

## **Gift Planning**

Members of the Katharine Dexter McCormick (1904) Society (KDMS), those individuals who have chosen to support the Institute's mission through bequests, life income funds, and other planned gift arrangements, were welcomed virtually by Provost Martin A. Schmidt SM '83, PhD '88 to the annual KDMS Appreciation Event on September 27. Each year this activity takes place during the same weekend as the Corporation Development Committee Annual Meeting and the MIT Alumni Association Alumni Leadership Conference, all of which were held virtually in FY2021. At the KDMS event, John Durant, the Mark R. Epstein (Class of 1963) Director of the MIT Museum, shared exciting details on the purpose-built MIT Museum that will have a new home in Kendall Square; reviewed recently completed gallery designs, exhibition topics, and themes; discussed the museum's role in the broader community; and presented highlights from the collection that celebrate MIT's critical role in advancing innovation.

OGP marketing activity included the production of [Corridor](#), a newsletter providing insights into planned giving strategies that can help donors meet financial goals while supporting the mission of MIT. Featured donors included James '72 and Muguette Alder; Thomas '84, SM '85 and Elizabeth Beliveau Davis '84, MArch '88; Joe Levitch '69; Kimberly Ritrievi SM '85, ScD '85; and Emerson Yearwood '80. The issue wrapped up with a special Q&A with dean of Admissions and Student Financial Services Stu Schmill '86 on MIT's distinctive admissions and financial aid policies, how the Covid-19 pandemic has affected the process, and the role that planned giving can play in funding scholarships.

A new Corridor webinar series featured two discussions by top tax and estate-planning attorneys from Hemenway & Barnes on how recent legislation, including the CARES Act, SECURE Act, and other Covid-19 relief bills, has changed the landscape for tax and estate planning and charitable giving. Their overview covered the current rules for retirement assets, options for reducing certain negative tax results arising from the new rules, and opportunities for coordinating tax, succession planning, and charitable giving under provisions of the Covid-19 relief bills and other recent developments.

A four-part video training with supplemental documents on the mechanics of planned giving was produced and provided to all Institute development staff. The series covers basic taxation for gift planners, assets used for charitable contributions, and both basic and advanced planned giving methods. In addition, downloadable documents on establishing charitable annuities, giving by bequest, charitable remainder trusts, and investing charitable remainder trusts in the MIT endowment were made available on MIT's advancement intranet.

As a result of these efforts, during FY2021 the OGP team filed 502 contact reports, recorded 3,102 touch tasks, and solicited 310 planned gifts. New gifts and new pledges of \$92 million exceeded the original \$45 million goal by 104%. Fundraising for core MIT priorities continued to be very strong. It is worth noting that this is the fifth year in a row that OGP has exceeded its NGNP goal (back to FY2017 when OLG and OGP were brought together under the Office of Individual Giving leadership).

**Amy Goldman**  
Senior Director, Gift Planning

**Christina Toro**  
Executive Director, Office of Individual Giving

## **Office of Foundation Relations**

The Office of Foundation Relations (OFR) identifies, cultivates, engages, and stewards private foundations to maximize support to the Institute from this philanthropic sector. Foundation Relations staff work to develop strategies for successful approaches to foundations, both building on existing relationships and facilitating new ones in partnership with faculty and staff across MIT. Overall, opportunities that have the potential for gifts of \$1 million or higher are prioritized. OFR has had a focus on foundations aligned with the goals of the MIT Campaign for a Better World and key initiatives, and also supports other high priority special projects for the Institute involving foundations.

On an ongoing basis, OFR collaborates with the Office of Philanthropic Partnerships on dually managed relationships (individuals and their affiliated philanthropic organizations); with colleagues across Resource Development; with the Offices of the President and the Vice President for Research; with other senior leaders—namely the chancellor for Academic Advancement; deans and faculty; and development, administrative, financial, and program staff in the five schools and college. OFR also works closely with campus units including Research Administration Services, the Office of the General Counsel, the Recording Secretary's Office, and the Office of Strategic Alliances and Technology Transfer. During FY2021, OFR strengthened liaison roles and communication with campus partners by establishing regular meetings, creating communication mechanisms, engaging in prospect and pipeline review, and coordinating through work on projects.

Key activities for OFR staff include: arranging virtual meetings with faculty for representatives from most of the major foundations in the United States and several international entities; coordinating and staffing meetings between senior officers and foundation leaders and program staff; engaging faculty and staff to develop strategies, proposals, meetings, and follow-ups; identifying and qualifying new foundations and philanthropic entities; stewarding existing foundation donors; and communicating with senior leaders, faculty, and school-based development staff about relevant foundation opportunities and current trends in the field.

OFR builds capacity using a two-pronged approach: first, undertaking new business development activities to add prospects; and second, fostering a greater number of connections across campus with current relationships. During FY2021, staff stayed connected to MIT's vibrant network of foundation relationships and kept connected to faculty through Zoom and other communication channels. The OFR staff members have worked diligently to sustain connections with funders and engage with new prospective supporters, even as timely national diversity, equity, and inclusion initiatives have shifted some funder's philanthropic priorities away from research universities like MIT.

In FY2021, OFR arranged senior officer meetings with heads of private foundations to engage in discussion around potential new funding opportunities. For example, in September, MIT Schwarzman College of Computing dean and Henry Ellis Warren (1894) Professor Dan Huttenlocher SM '84, PhD '88 and Ford Foundation president Darren Walker discussed early-stage ideas the foundation has for supporting computing and equity issues and anchoring the emerging field of public interest technology. Chancellor for Academic Advancement Eric Grimson held multiple meetings with the president of the Alfred P. Sloan Foundation, Adam Falk, to steward MIT's longstanding relationship with the Sloan Foundation and to share thoughts on nucleating new fields of scientific research as the foundation launches a new basic science program.

Key foundation segments explored during FY2021 included Diversity, Equity, Inclusion, and Belonging; Social and Ethical Responsibilities of Computing and issues related to DEIB and computing; and climate, energy, environment, and sustainability. These projects resulted in gifts from Ascendium to the MIT Educational Justice Institute for an expansion of the Massachusetts state-wide prison education collaboration, including into Maine and New Hampshire; Claire Booth Luce graduate fellowships for women in the Department of Electrical Engineering and Computer Science; the G. Harold and Leila Y. Mathers Foundation awards to the McGovern Institute and School of Engineering for research in genetic engineering, screening, and imaging research as well as simpler Covid testing; and Burroughs Wellcome Fund support for the Department of Chemistry DEIB initiatives and the STEM+ program in the Environmental Solutions Initiative. Other important support included funding to MIT's Jameel Clinic from the Wellcome Trust, support from the Sloan Foundation for physics professor Jeff Gore '99 and his lab, resources for the Healthy Elections Project from the Gates and Skoll Foundations, philanthropy to the Collins Lab's Antibiotics-AI project from a consortium of funders, and a gift to the Schwarzman College of Computing's Internet and Policy Research Initiative from the Hewlett Foundation.

OFR's FY2021 key results, achieved in partnership with RD colleagues, faculty, staff, and senior leadership, included the following:

- 918 new gifts and pledges (31 of \$1 million or more), totaling \$92.5 million
- 1 presidential foundation meeting with OFR involvement
- 19 senior officer/dean foundation meetings with OFR involvement
- 136 additional foundation visits and significant interactions

During FY2022, OFR will:

- Focus on MIT priorities and highest-level foundation opportunities
- Sustain relationships with key funders and continue outreach to new foundations
- Reinforce proactive work to grow MIT's pipeline of foundation supporters
- Continue to advance best practices in OFR operations activities, including stewardship, research, tracking, and administration
- Foster organizational resilience

**Alicia Carina Sanchez**

**Executive Director, Foundation Relations**

## **Campaign Office**

The Campaign Office was established to help construct the framework for fundraising in the Campaign for a Better World and engage MIT leadership, faculty, advancement community units, and volunteers in the work needed to achieve a \$6 billion goal. The office facilitates the raising of gifts by providing strategic initiative planning and capital projects fundraising management; undertaking goal feasibility; aligning fundraising activities with Institute priorities; reporting of results; collaborating with the Office of the Corporation in the management of the Visiting Committee and Corporation Partners programs; coordinating the activities of MIT leadership and key volunteers through the Corporation Development Committee and the Campaign Leadership Council (CLC); offering educational sessions to the advancement community; performing business analytics and benchmarking of peer and industry trends; and engaging donors through philanthropy and Institute governance roles.

With the challenges of holding face-to-face meetings, the CDC's annual meeting was held virtually on September 25, in conjunction with the Alumni Association's virtual Alumni Leadership Conference. Chairman of the Corporation Robert B. Millard '73 welcomed CDC, CLC, and Parent Leadership Circle board members to the event, followed by an update on the Campaign and overall fundraising progress. A Covid-19 Research Spotlight featured Lydia Bourouiba, associate professor of civil and environmental engineering and of mechanical engineering and an affiliate faculty member for

the Institute for Medical Engineering and Sciences, focusing on airborne particle transmission at various scales and the effectiveness of face masks in the age of Covid-19 pandemic. Professor Huttenlocher offered updates on the College and how it is shaping the future through computing and AI education, research, and innovation. During their presentation, titled “Fueling MIT’s Financial Future,” Seth Alexander, president of the MIT Investment Management Company, and Glen Shor, MIT’s executive vice president and treasurer, provided updates and insights on the Institute’s endowment and finances. The day concluded with the presentation of the Marshall B. Dalton 1915 Award to Barrie Zesiger HM for her extraordinary leadership and support in developing resources on MIT’s behalf. In addition to the annual meeting, regional CDC meetings throughout the year featured faculty and senior staff on topics ranging from admissions and financial aid to student well-being, campus planning, and capital projects.

At the June 10 virtual Campaign Leadership Council meeting, hosted by President Reif, Vice President for Resource Development Julie Lucas shared Campaign accomplishments and impact on the Institute and expressed her gratitude for the volunteer partnerships of council members. Carrie Johnson, RD executive director of Communications, Events, Donor Relations, and Stewardship, shared plans for marking the Campaign closure throughout AY2022. The meeting concluded with a special performance by The Chorallaries of MIT.

At the spring MIT Corporation Partners meeting, Mendel Rosenblum (spouse of MIT Corporation Chair Diane Greene '78) hosted an event entitled, “Around MIT: Stories and Students.” The online gathering featured members of the MIT Class of 2021, including Marshall Scholars, Rhodes Scholars, and Schwarzman Scholars.

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

The Focus on Fundraising training series throughout the year provided opportunities for advancement staff to build skills, share best practices, and increase knowledge of the MIT fundraising landscape. Topics covered a broad range of MIT initiatives with faculty and staff: the MIT Stephen A. Schwarzman College of Computing; the School of Science; the MIT International Science and Technology Initiative; the MIT Innovation Initiative; MIT Solve; the MIT Climate and Sustainability Consortium; the MIT Leadership Center; the Institute Community and Equity Office; the MIT Summer Research Program; and several departments across MIT, including Architecture, Economics, Materials Science and Engineering, and Physics.

The Leadership Engagement team shares information and identifies strategies and opportunities for deployment of the senior officers and other Campaign leaders. Among their numerous activities, staff recorded 117 virtual appointments for Rafael and Christine Reif; conducted briefing sessions on high-level prospects and meetings for

the president and chairman; participated in prospect strategy sessions for the chairman and president; and conducted the Presmeet and Cmeet processes for frontline staff requesting meeting time for their donors and prospects with the president and chairman.

As the Campaign for a Better World comes to its official close this year, the Campaign Office team will shift focus to ensure alignment of fundraising activities with Institute priorities, collaboration with partner units, benchmarking of MIT's performance against peers, and implementation best practices. As the primary point of contact for the MIT advancement and broader communities, the office will concentrate efforts on providing standardized fundraising tools and unified approaches in a timely and efficient manner as well as developing customized strategies to meet the unique challenges and urgencies of the MIT fundraising environment.

**David A. Woodruff**

**Associate Vice President and Chief Operating Officer**

## **Office of Communications, Events, Donor Relations, and Stewardship**

### **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 producing three virtual Campaign roadshow events open to the global MIT community in this final year of the Campaign for a Better World; creating strategic plans for the communications, events, and stewardship activities to mark the close of the Campaign in the coming year; and serving the individual communications and event planning needs of partners across the Institute. As important was the office's focus 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, the MIT Stephen A. Schwarzman College of Computing, and various departments, labs, and centers.

The pivot to a virtual format for the Campaign roadshows allowed RD to significantly increase the audience participation in each of the individual events over what would have been possible through in-person events (representing an attendance increase ranging from threefold to sixfold, per event). Overall, more than 2,500 alumni and friends from 57 countries logged into this series of programs featuring faculty, students, and alumni, who showcased MIT's continuing progress on science and discovery, innovations in human health, and sustainability.

In addition, the Communications and Events team developed the framework for a significant new Institute event series, [MIT Forefront](#), in which renowned scientists, engineers, and researchers from MIT and beyond joined with influential business and policy leaders to share expertise and explore new strategies to inform policy and spur action. The first event, "Disrupting the Inequalities of Covid-19 in Work and Health Care," drew more than 1,000 attendees to explore the deepening economic fault lines

and exacerbating inequalities, particularly in work and health care. “Work of the Future,” which attracted more than 15,000 attendees, considered action on the efforts of MIT’s Task Force on the Work of the Future, a two-year endeavor to explore how we can harness technological innovations for social benefit. The third event in the FY2021 series, “Addressing Climate and Sustainability through Technology, Policy, and New Business Models,” which drew more than 12,000 attendees, addressed critical questions of accelerating the development of affordable and practical solutions, increasing investment in technologies that reduce greenhouse gas emissions, and reducing the financial and human costs of fighting climate change.

The team also continued to populate the series of stories on the [Better World website](#) conveying importance of scholarships to MIT’s longstanding commitment to need-blind admissions. Each story features one student discussing how donors’ investments in their MIT education will have future positive impact on the world.

Further, the team produced two issues of [Spectrum magazine](#), in both digital and print formats. The summer issue on the theme of computation and collaboration imparted the tremendous enthusiasm for the intellectual opportunities created by computing and artificial intelligence not only in science and engineering, but in all disciplines. The issue featured faculty and students describing their vision for how the MIT Stephen A. Schwarzman College of Computing will transform interdisciplinary learning, research, and discovery, with articles on a variety of perspectives on the college, such as its structure and formation, ethical and social impacts of computing advances, and the SuperUROP program, in which students use computing to tackle questions in fields as diverse as robotics, health care, and transportation. The spring issue on Earth looked at just a few of the engineering projects under way at the Institute that address the health of the planet, from designs for electric-powered airplanes and portable microreactors to new systems for discovering solar cell materials to novel methods of carbon capture and sequestration.

The team continued to produce MIT Responds, a periodic e-newsletter about the Institute’s efforts related to the Covid-19 pandemic, which it had developed during the prior year for top-level donors, prospects, and other groups who are highly engaged with the Institute, such as members of the MIT Corporation and the MIT Alumni Association board of directors. Broadcast to an audience of 7,400, the e-newsletter spotlights stories curated from the MIT News website about the ingenuity of the MIT faculty and researchers who are leading more than 50 Covid-19 pandemic research and emergency outreach projects from extensive investigation into the underlying science to development of tests and treatments to outreach projects and the social impact of the Covid-19 pandemic.

The team added fresh materials to the RD communications library to keep fundraisers, volunteers, donors, and prospects up to date on MIT’s fundraising priorities. Just a few examples include a video showcasing the nearly completed graduate student residence tower (Building E37) in Kendall Square and the Reimagining Campus webpage on the Campaign website; exterior renderings of the Earth and Environment Pavilion (Building 55) to be built adjacent to the iconic Green Building (Building 54); a one-pager on the conversion of the historic Metropolitan Warehouse into a state-of-the-art hub for design,

a home for the largest makerspace on campus, and combined space for the units of the School of Architecture and Planning that are currently dispersed across campus; collateral and a webpage about the new Music Building; pieces about the Burton-Connor dormitory renovation and the Student Center renovation; a one-pager and brochure about the MIT Stephen A. Schwarzman College of Computing building; an extensive FAQ on endowed fellowships for graduate students from underrepresented minority groups; and a one-pager on the MIT Summer Research Program conveying how support for a School of Engineering summer research intern from an underrepresented and underserved background drives positive change by advancing the intellectual and professional growth of these students. Overall, the team completed 667 marketing, communications, and design projects to support the Institute's highest fundraising priorities, wrote or edited 25 \$5 million plus proposals and concept notes, and developed a robust mix of event marketing and production materials.

In the coming year, the primary focus of the Communications and Events team will be to produce a series of activities to mark the close of the Campaign and develop RD's post-Campaign strategies for messaging, events, and donor engagement. These activities will showcase the Campaign's significant impact on enabling the people of MIT to help make a better world and thank the alumni and friends who participated in the Campaign while fostering their continued engagement with and philanthropic support of the Institute.

Key activities include:

- "Marking the Milestone" communication from President Reif in fall 2021 that will lead to a specially created webpage on the Campaign website that will include videos from President Reif, deans, and senior leaders, as well as facts and stories illustrating the Campaign's positive impact on MIT and the world
- A cadence of impact storytelling across a range of Institute communications channels about the Campaign's five problem-solving and discovery priorities (Discovery Science; Health of the Planet; Human Health; Innovation and Entrepreneurship; and Teaching, Learning, and Living) as well as the MIT Core (fellowships, scholarships, professorships, student life, capital, and unrestricted giving)
- Research about donor perspectives on the effectiveness of Campaign fundraising, communications, and stewardship to inform future donor engagement and recognition
- A Better World Weekend event on campus in spring 2022 to recognize Campaign donors and volunteers, show the impact of their philanthropy, and provide a bridge between the Campaign for a Better World and the Institute's ongoing fundraising priorities

### **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 principals: acknowledgement, recognition, engagement, and reporting.

DRS oversees the process by which the MIT Resource Development president and vice president acknowledge charitable gifts from individuals to the Institute. The team 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 tone. During FY2021 the team processed 1,250 gift acknowledgements (618 presidential and 632 vice presidential). New this year was the integration of the gift acknowledgement process with the philanthropic due diligence process, which performs a background news check on donors to support MIT gift acceptance procedures. The DRS team conveyed nearly 1,000 other RD-oriented presidential communications via the PresDrafts process.

The 77 Society recognizes those donors whose leadership gifts of \$100,000 or more to the Campaign for a Better World are helping MIT to build the future. Donors are welcomed with a vice presidential letter 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. The MIT Charter Society recognizes MIT's most generous donors—those who have given \$1 million or more to the Institute in their lifetime. To celebrate their membership, donors receive a welcome note from President Reif, followed by a very special gift: a piece of limestone from MIT's original Main Group (buildings “designed by MIT-educated architect William Welles Bosworth, Class of 1898”). During FY2021, Resource Development welcomed 149 new individuals (93 new member households) to the 77 Society and 44 new individuals (26 new member households) to the Charter Society. Over the course of the year, 144 medallions and 36 limestones were presented to donors by senior officers, deans, department heads, and other MIT representatives.

Donor Relations and Stewardship, along with Communications colleagues, produced two milestone gift recognition packages for donors whose lifetime giving exceeds \$100 million. This package features an original oculus tile from the MIT Great Dome showcased in a bronze sculpture by artisans at the MIT forge and foundry, which is presented in a bespoke box with a customized book highlighting the donor's impact on MIT. In May 2021, a presentation was made to Barbara Picower after the conclusion of the Picower Institute's spring symposium. In addition, a recognition package was prepared for Patricia and James Poitras '63, and it will be presented in person later this calendar year.

The Donor Relations and Stewardship team actively stewards 650 endowed and expendable scholarship funds, benefiting nearly 900 undergraduates. During the month of December, the team distributed 775 scholarship/endowment reports to scholarship stewardees. Packages for endowed and expendable funds comprised combinations of various components including biographies of scholars and scholar thank-you letters; a financial summary of the individual funds and their impact on the Institute; an information sheet describing MIT's prior fiscal year endowment performance; a one-pager on MIT's latest incoming class with an overview of student and financial aid data; and

cover letters from Executive Vice President and Treasurer Glen Shor and vice chancellor for Undergraduate and Graduate Education, Jerome C. Hunsaker Professor Ian Waitz.

This year, a new initiative to recognize significant scholarship anniversaries was introduced. For funds that have reached or surpassed their 25th anniversary, a certificate, a personalized letter, and a roster of all of the students supported by the fund since its inception are presented in a custom folio. In FY2021, the first package was prepared for Richard P. Simmons SB '53 and Virginia Simmons to mark the 30th anniversary of the Richard P. Simmons (1953) Scholarship Fund. Twelve additional major- and principal gift-level scholarship donors received milestone recognition packages over the course of the year.

In March, the Donor Relations and Stewardship team distributed 500 student thank-you letters and videos to scholarship donors. These communications were delivered by email with a cover message from Vice Chancellor Waitz thanking them for their generosity and describing how critical scholarships are to MIT's commitment to a need-blind admissions policy.

Cynthia Barnhart, chancellor and Ford Professor of Engineering, served as host for the virtual MIT Scholarship and Undergraduate Research Opportunities Program (UROP) Brunch on April 11. The event featured an engaging conversation with current MIT undergraduates on the positive impact of the Institute's scholarship and UROP programs as well as the challenges and rewards of navigating MIT in a remote learning environment. In addition, Danielle Wood '05, SM '08, PhD '12 director of the Space Enabled Research Group at the MIT Media Lab and assistant professor of media arts and sciences and of aeronautics and astronautics, shared her insights on how UROP projects and student mentoring were translated to virtual rather than on-campus experiences due to the Covid-19 pandemic. Because the Covid-19 pandemic prompted cancellation of the in-person event, Resource Development also distributed an email message from Chancellor Barnhart thanking recipients for their support and featuring thank-you videos from students with messages of gratitude for how scholarships and UROPs have positively impacted them.

In addition to the robust scholarship stewardship program, the Donor Relations and Stewardship team produced 113 Department of Athletics, Physical Education, and Recreation donor impact reports; 15 Office of Graduate Education, Provost, and Schwarzman College of Computing fellowship reports; and 17 Provost and Schwarzman College of Computing professorship reports that introduced new chairs and or reported on existing chairs, providing updates on their academic activities. DAPER stewardees received cover notes from program leaders, including department head G. Anthony Grant, updates on the programs they supported, and student testimonials on their experiences with those programs. Professorship and fellowship stewardees received report packages that include a cover letter from MIT leadership, such as Vice Chancellor Waitz; Provost Martin Schmidt; or the appropriate dean or department head, along with a thank-you letter from the beneficiary and their CV. Reports are paired with endowment information as appropriate.

The DRS team expanded the individualized stewardship program in the past year to partner with school-based relationship managers on stewardship plans for donors in their portfolios. The team created 126 new and 132 updated plans for donors in RD portfolios as well as donors managed within the School of Humanities, Arts, and Social Sciences and the School of Science.

Annual comprehensive stewardship reports were completed for some of the Institute's top-level donors, including Joyce Linde W '62; Julia Koch W '62; John '61, SM '65 and Cindy Reed; an anonymous foundation; Mohammed Jameel; and the Lemelson Foundation. New reports for Eric and Wendy Schmidt, and Jack Little/MathWorks were also developed and delivered.

**Jen McGrath**  
Senior Director, Donor Relations and Stewardship

**Carrie Johnson**  
Executive Director, Communications, Events, Donor Relations and Stewardship

## **Strategic Information Management**

The Strategic Information Management (SIM) unit builds on the synergies that exist across the Resource Development Information Technology and Prospect Development teams, with collaboration in the areas of business intelligence, data modeling, strategic research and analysis on individual prospective donors, information delivery and related processes, and partners with fundraisers to optimize prospect portfolios. 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 (AA) on data governance and ensures data integrity.

To achieve alignment and integration with campus administrative systems, SIM collaborates with the Offices of the President, Provost, and Chancellor, the Corporation Office, General Counsel, Risk and Compliance services, Research Administration Services, and Strategic Alliances and Technology Transfer.

During FY2021, SIM engaged Huron Consulting to complete a Business Case for Technology Transformation as well as a Data Privacy and Access review. Based on the findings of these initiatives, SIM worked closely with Information Services and Technology and the Office of the Vice President for Finance to create an Advancement Technology Roadmap, a plan to determine the appropriate technology and associated costs of an alumni database and CRM replacement for the entire MIT advancement community.

In order to engage program managers and senior leaders in critical decision making regarding the long-term roadmap for information management, SIM convenes a Strategic Information Priorities Committee (SPC) of key stakeholders from all of the

units in RD as well as other constituencies from the AA, the Recording Secretary's Office (RSO), and the Sloan School of Management. We are pleased to report that SIM achieved all high-priority goals set by the SPC for FY2021:

- A Fundraising Portfolio Tool (FPT) was upgraded to provide new features for gift officer management of their portfolios.
- In partnership with the RSO and AA, SIM streamlined receipting, endowment, and scholarship reporting while moving these processes to a digital platform when possible.
- A self-serve Prospect Summary was developed to provide the advancement community with a timely overview of alumni and donor information.
- SIM utilized new technology to assist in prospecting for MIT priority initiatives, such as Diversity, Equity, Inclusion, and Belonging; climate; and capital projects.
- SIM has also been successful in operationalizing key components of Philanthropic Due Diligence and Initiative management. This work will continue to be a key focus for FY2022.
- SIM has completed and is now testing an extensive integration with Cvent, a cloud-based event system designed to support hybrid events moving forward, and will be testing with in-house events during fall FY2022.

Engagements unrelated to the Advancement Technology Roadmap included a project to comprehensively redact personal identifying information from the large dataset in the Advance database; penetration testing to identify vulnerabilities in the security infrastructure of RD data; and identification and elimination of obsolete documents from the RSO file management system.

In response to the findings of the Ad Hoc Faculty Committee on Guidelines for Outside Engagements, SIM has continued to build a strong philanthropic due diligence program that partners closely with the RSO to support MIT gift acceptance processes. Gifts over \$50,000 are now not considered fully accepted until a background news check has been performed, and, as necessary, identified issues are elevated to the Interim Gift Acceptance Committee for review.

An enhanced version of the new Fundraiser Portfolio Tool was released during FY2021. The FPT is an interactive tool designed to help fundraisers manage their portfolios, identify prospects and proposals that may need attention, and track activity and progress toward annual goals. It also highlights action items such as upcoming tasks and proposals and contains data on past portfolio activity. The new version introduced features to help gift officers, operations staff, and senior management view activity at a team or office level, to enable them to draw insights on broader fundraising operations.

Throughout the year the Prospect Development team provided strategic prospect research and portfolio optimization to all fundraisers across the Institute. The Prospect Management policy was updated to reflect a donor-centric approach and donor populations began to be analyzed to test preconceived assumptions related to donor behavior.

The Information Systems group continued to provide timely support to all staff working remotely, offering training and comprehensive documentation on collaboration tools and individualized troubleshooting of all end-user help requests.

The work of SIM throughout FY2021 is illustrated by these specific metrics:

- Identified 919 new prospects (of which 616 are MIT alumni)
- Completed 707 briefings for MIT senior administrators
- Conducted 1,858 capacity evaluations (prospect ratings)
- Completed 17,801 prospect assignment and additional portfolio and proposal updates
- Completed 383 tier 3 enhanced due diligence reviews
- Completed 1,770 tier 2 news reviews
- Completed 2,615 IT Services (helpdesk) requests; 384 programming requests (lists and other related requests); 174 reporting and analytics requests; and 142 web development requests (Campaign website and toolkit)
- Onboarded/offboarded the technology and information facets of 89 RD employees (approximately 15 subtasks per staff ticket)
- Completed comprehensive projects: IT Services 35; programming 11; reporting and analytics 14; web development 5
- Modified 38,065 advance donor and alumni information database records
- Updated 12,937 Development Office files

Priorities for FY2022 include:

- Developing and finalizing a post-Campaign analysis to inform and refine fundraising and stewardship strategies
- Partnering with the advancement community to ensure the success of Campaign closure activities
- Implementing the next steps of the Advancement Technology Transformation
- Sunsetting and archiving Campaign related tracking summaries, such as the Monthly Campaign Progress, Campaign Commitments by Priority, and other Campaign-specific reports
- Implementing a data privacy and access workplan
- Continuing portfolio optimization
- Training on and adoption of advancement policies and processes that support fundraising success

- Further operationalizing enhanced philanthropic due diligence processes, including the experiment to expand the level of giving subject to gift acceptance policies
- Participating in the Compliance Committee and ongoing general data protection regulations, IRS, and foreign gift reporting requirements for MIT
- Engaging and retaining staff through professional development and related growth opportunities
- Fostering a culture characterized by diversity, equity, inclusion, and belonging and inviting staff to bring their “whole selves” to their work community

**Deborah M. Cunningham**  
Executive Director, Strategic Information Management

### **Resource Development and Alumni Association Human Resources and Strategic Talent Management**

The Office of Human Resources and Strategic Talent Management (HR/STM) assists the senior teams of Resource Development and the MIT Alumni Association 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 RD and AA relative to talent management, including: staffing and retention, employee engagement, performance management, employee relations, diversity and inclusion, professional development, compensation, and rewards and recognition. In addition, HR/STM facilitates all organizational changes within RD and AA and drives the effort to create a comprehensive talent management strategy for the Campaign and beyond.

RD strives to inspire a culture of employee engagement for our community, and assesses that engagement by implementing the Gallup Q12 Employee Engagement survey. This annually conducted, seven-minute online survey gives every employee the opportunity to share information that helps us understand and improve commitment to the organization and its goals. This enables each unit to identify areas of focus to improve levels of engagement and our work environment. During FY2021 HR/STM encouraged each executive director to work with their teams on an employee engagement plan that addresses one or more areas in the survey results.

Resource Development supports and encourages a culture of development where every member of our community has the opportunity to grow, thrive, and be fully engaged in their work on behalf of the Institute. The roots of our culture are grounded in the understanding, appreciation, and celebration of diversity and inclusion. Education and communication on issues of diversity, equity, inclusion, and belonging were the primary focus of HR/STM’s training initiatives during FY2021. Programs were offered on numerous related topics including:

- How to navigate difficult interactions and conversations with internal and external constituents
- Providing a common framework and language for gender to support interactions with colleagues and alumni/alumna
- Managing microaggressions
- Disability in the workplace
- Accountability: holding people accountable whether they report to you or not
- Embracing allyship

The HR/STM team implemented a DEIB Pulse Survey and encouraged all groups to create a DEIB action plan based on the results. The team compiled and distributed monthly DEIB learning bundles on various aspects of DEIB, from creating a culture of belonging to celebrating LGBTQ+ pride to supporting our Asian, Asian American, and Pacific Islander colleagues, and more. In addition, several staff groups were formed, including a DEIB committee and a group to create a DEIB accountability statement.

Resource Development participated in the CASE Diversity Internship program twice during FY2021 by hiring interns from traditionally underrepresented groups to expand their career skills by working with the Office of Leadership Giving, Strategic Information Management, Alumni Relations, and the Annual Fund.

To support teams with staff vacancies due to the Institute hiring freeze, HR/STM established a Talent Share program whereby staff with capacity in their workloads were loaned to other teams to assist with special projects. This mutually beneficial arrangement provided much needed relief to understaffed teams as well as skills enhancement and career development to staff.

HR/STM continued the structured process for managing performance reviews by setting timelines for every stage in the process, from goal setting to midyear check-ins to year-end performance assessment. The team offered coaching sessions for both managers and staff on creating SMART (specific, measurable, attainable, relevant, time-bound) goals and conducting performance discussions.

During FY2022, HR/STM will be the primary driver behind the Resource Development overarching goal: “Invest in the well-being of our talented staff and maintain a respectful and nurturing work environment that upholds MIT values.”

The team will seek to foster and strengthen staff excellence by:

- Implementing a strategic talent management roadmap for acquiring, engaging, assessing, developing and retaining staff
- Preparing for a phased return of staff to Building W98, implementing tenets of the Work Succeeding Initiative
- Engaging and retaining staff through professional development opportunities

- Defining career development pathways and strategies to retain staff post-Campaign
- Fostering a culture characterized by diversity, equity, inclusion, and belonging
- Supporting MIT's mission and exemplifying our RD mission, vision, values, and core competencies in our day-to-day work

**Ellen Gilmore**

**Executive Director, Human Resources and Strategic Talent Management**

### **Resource Development and Alumni Association Finance and Operations**

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.

The FO team supported the associate vice president and COO and the executive directors of RD, as well as the CEO and the executive directors of AA, in managing the FY2021 strategic planning and budget allocation process. The FO team worked diligently with staff at all levels to complete their traditional duties and manage through the spending controls and hiring freeze all while working remotely. The team focused their efforts in RD on financial stewardship as the Campaign reached the \$6 billion goal. For the AA, the team provided traditional financial oversight to signature work, completed talent share assignments for teams under staffed due to the hiring freeze, and continued support to alumni volunteers.

With the continued closure of campus due to the Covid-19 pandemic, operations staff continued critical on-site building management in support of both RD and AA with special attention to ensure continuity of gift operations. One dedicated operations staffer worked full-time in Building W98 managing the Covid Pass access system, collecting and distributing incoming mail, supporting overall gift operations including to the Recording Secretary's Office, and supervising overall building management. In collaboration with the AA and RD Tech Support teams, FO staff facilitated the distribution of computer and office equipment for all building staff who were working from home, and responded to ad hoc requests for project support and as needed connections to Building W98 and the campus.

The FO executive director worked on several special assignments—provided enhanced support to the CEO of AA for special initiatives; worked with Facilities teams to complete the design for and begin construction of a new alumni space on the Infinite Corridor; initiated discussions with the new CEO of the MIT Federal Credit Union to enhance the affinity agreement partnership; provided support to the Advancement IT

Roadmap team; and reconvened the W98 Building Committee. This committee focused on the safe return for all staff to Building W98 through enhanced communication of processes and membership in MIT's Work Succeeding Initiative.

In related work, senior members of the team worked with staff from the Vice President for Finance Office and the Recording Secretary's Office on quarterly updates of the comprehensive Campaign Cost and Gifts Forecasting dashboard; participated in the annual Educational Advisory Board Advancement Benchmarking Initiative; coordinated the collection of data and questionnaires from all advancement offices across the Institute on behalf of the MIT Tax and Global Operations Office in preparation for filing the 2020 IRS Tax Form 990; and participated in the annual Voluntary Support of Education survey managed through the Council for the Advancement and Support of Education.

**William J. Fitzgerald**  
Executive Director, Finance and Operations

**Susan I. Shansky**  
Director, Finance