

## Vice President for Resource Development

The philanthropic generosity of individuals, corporations, and foundations has been an important source of revenue for MIT and has helped the Institute maintain its world-class status in education, research, and innovation. The [Office of Resource Development \(RD\)](#), in partnership with senior leadership, volunteers, faculty, and staff, reported the best year of philanthropic support in its history in FY2019 and set new fiscal-year records for scholarship giving. This was MIT's sixth consecutive year of growth in overall fundraising dollars.

In view of the cumulative success of the Campaign for a Better World, along with the \$350 million foundational gift toward the \$1 billion commitment to establish the MIT Stephen A. Schwarzman College of Computing, MIT expanded the campaign fundraising goal to \$6 billion in December 2018. As of this writing, the campaign total stands at \$5.2 billion, or 87% of the new goal. Results in FY2019 are as follows.

New gifts and pledges for FY2019 totaled \$938 million, the highest year on record for the Institute. New gift and pledge totals for the previous four fiscal years were \$732.4 million in FY2018, \$581.6 million in FY2017, \$515.7 million in FY2016, and \$507.8 million in FY2015.

Cash gifts and the fair market value of non-cash gifts for FY2019 totaled \$611 million, as compared with \$497.7 million in FY2018, \$682.8 million in FY2017, \$427.8 million in FY2016, and \$449.9 million in FY2015.

Cash gifts comprise cash and the fair market value of non-cash gifts received in full during the year, while new gifts and new pledges include outright cash gifts and new multi-year pledges to be paid.

During FY2019 Resource Development brought President L. Rafael Reif's vision for the future of MIT, our vibrant global community, and our mission to build a better world to six cities. Organized in collaboration with the MIT Alumni Association (AA), events in New York; San Francisco; Palo Alto, CA; Los Angeles; San Diego; and Beijing provided more than 1,500 alumni and friends with 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.

Over the year, Resource Development arranged for 339 on-campus visits by prospects and donors with 245 faculty members, deans, and senior administrators. In addition, RD arranged travel for 63 faculty and senior officers to meet with prospects and donors around the world and organized 96 events ranging from receptions and dinners hosted in volunteers' homes to major gatherings of alumni and friends in regions across the globe.

**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 scholarships, fellowships, and Institute priorities; facilitates senior leadership efforts in support of the Campaign for a Better World and ensures that leadership priorities are clearly communicated to RD audiences; ensures that volunteers are actively engaged in cultivation, solicitation, and stewardship activities; and develops strong partnerships with schools and departments, labs, and centers to organize campaign stewardship activities.

The 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 campaign leaders; Volunteer Management, which supports the activities of the Institute's highest level of fundraising volunteerism, the Corporation Development Committee (CDC) and the Campaign Leadership Council (CLC); and Campaign Operations, which manages policies and procedures for capital fundraising, develops and implements reporting systems for the campaign, and provides data-driven analyses to guide decisions on MIT's strategic fundraising efforts.

Chairman Robert Millard '73 kicked off the annual meeting of the Corporation Development Committee on September 20. After CDC members toured Building W97, the warehouse that has been transformed into a 25,000-square-foot performing arts space, Millard hosted a dinner and discussion with deans and faculty from MIT's five schools. A full day of presentations followed, including Zachary Hartwig PhD '14—assistant professor of nuclear science and engineering, who provided insight into SPARC (Soonest/Smallest Privately Funded Affordable Robust Compact)—the proposed fusion device that will demonstrate net energy; a session on planned giving and the likely impact of the 2018 tax policy changes on philanthropy led by Lorry Spitzer—counsel in the Office of General Counsel, and Amy Goldman—director of gift planning; a session on MIT finances and the endowment with Seth Alexander—president of the MIT Investment Management Company, and Glen Shor—vice president for finance; and a closing with Zeynep Ton—adjunct associate professor of operations management, who made the compelling case that companies providing employees a decent living and a sense of purpose and empowerment at work can be every bit as profitable as companies striving to keep their labor costs low. Throughout the year, meetings of the CDC regional committees continued to engage and educate volunteers on Institute priorities; regional meetings were held in Chicago; metropolitan New York; Texas; Florida; Palo Alto and Menlo Park, CA; San Francisco; Los Angeles; San Diego; Chicago; and New England as well as London and Hong Kong.

The Campaign Leadership Council employed strategies to engage new prospects and alumni. The council meeting on December 7 featured Ian A. Waitz—vice chancellor for undergraduate and graduate education and Jerome C. Hunsaker Professor of Aeronautics and Astronautics—moderating a panel of undergraduate and graduate students who have benefited from scholarship and fellowship support. On October 4, CLC joined Julie Lucas—vice president of resource development, and Vladimir Bulović—director of MIT.

nano and Fariborz Maseeh (1990) Professor of Emerging Technology, to commemorate the occasion of the MIT.nano ribbon cutting. In addition, on March 1 President Reif and Julie Lucas hosted a special program (The Most Innovative Square Mile on the Planet: Telling the New Story of Kendall Square) for CLC and the New England Corporation Development Committee. The meeting featured a panel including John Durant, director of the MIT Museum and adjunct professor in the Program in Science, Technology, and Society; Michael Owu '86, director of real estate for the MIT Investment Management Company; Michael Amoako '19, an undergraduate maker in computer science and theater arts; Marla Odell '20, computer science and economics; Jessie Schlosser Smith, director of open space programming; and William Kimball, a PhD candidate at the Sloan School of Management's Institute for Work and Employment Research.

Council members extended invitations to several Institute events this year. Mark Gorenberg '76 and Cathrin Stickney hosted a number of events to highlight Institute priorities at their home in the Bay area, including the Aging Brain Initiative with Li-Huei Tsai, Picower Professor of Neuroscience and director of MIT's Picower Institute for Learning and Memory. Professor John Fernández '85, director of the Environmental Solutions Initiative, was the featured speaker at a dinner and discussion hosted by Derry Kabcenell '75 and Charlene Kabcenell '79 in Palo Alto, CA; Fernández spoke on "Global Environmental Solutions: Expanding MIT's Commitment and Actions."

The Campaign Engagement team shares information and identifies strategies and opportunities for deployment of senior officers and other campaign leaders. Among their numerous activities, staff recorded 159 confirmed appointments across RD for President and Mrs. 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 managed processes for frontline staff requesting meeting time for their donors and prospects with the president and chairman.

A number of new resources, developed collaboratively by the Communications and Events team and the Campaign Office, were produced during FY2019 to help guide conversations with donors who would like to support undergraduate financial aid, including [a story on the Better World website](#) illustrating the life-changing impact of scholarships and stories of those who give and receive undergraduate student support in an issue of *MIT Spectrum*.

Training initiatives throughout the year included Campaign Academy and Fundraising Spotlight sessions featuring faculty leads on fundraising needs and new programs. HackRD (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 annual Institutional Intelligence Forum, provides members of the MIT advancement community an opportunity to come together and gain insight into current and future Institute priorities. This year staff heard about admissions and financial aid from Stu Schmill '86, dean of admissions and student financial services, and about residential life from David Friedrich, senior associate dean, Housing and Residential Services; David A. Singer, associate head of house, MacGregor, and associate professor of political science; and Chinonyelum Ikeanyi '19 from

the Department of Mechanical Engineering. 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**

**Executive Director of the Campaign, Donor Relations and Stewardship**

## **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 gifts to MIT and engage donors in the life of the Institute. DRS cultivates donors' confidence, trust, and good feelings through four foundational principles: acknowledgment, recognition, engagement, and reporting.

Donor Relations and Stewardship 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 that all correspondence prepared by Resource Development on behalf of the MIT president is grammatically correct, reflects accurate and comprehensive content, and captures an appropriate presidential tone. During FY2019, the number of gift acknowledgments increased by 5.6% (from 1,137 to 1,201) over the prior year. The average turnaround time for presidential letters from receipt of the gift to mailing of the acknowledgment was 5.7 days, two full days faster than the previous year. Additionally, the DRS team conveyed more than 1,600 RD-oriented presidential communications.

In addition to our work in generating these important communications, DRS also executed an Institute-wide audit of schools, departments, research centers, and programs that generate gift acknowledgments. A total of 95 colleagues responded to our outreach and shared with us how 64 MIT programs effectively steward their donors and use confidential gift and donor information in their work.

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. During FY2019, Resource Development welcomed 184 new individuals (119 new member households) to the 77 Society with the distribution of vice presidential welcome letters 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.

During the first weekend of April, Resource Development celebrated some of MIT's most generous donors including members of the MIT Charter Society (donors who have made gifts to the Institute totaling \$1 million or greater), scholarship sponsors, and Undergraduate Research Opportunities Program (UROP) supporters. A Saturday morning gathering of the Charter Society (Conversation, Exploration, and Celebration) provided a deep dive into MIT's work to advance the science and engineering of human and artificial

intelligence and highlighted the MIT Stephen A. Schwarzman College of Computing in the form of a panel presentation and breakout sessions. MIT faculty presenters included Thomas Malone, Patrick J. McGovern (1959) Professor of Management; Marin Soljačić '96, professor of physics; Leslie Park Kaelbling, professor of computer science and engineering; and Joshua Tenenbaum PhD '99, professor of brain and cognitive sciences. During a strolling lunch, guests explored a “hall of innovations” with interactive exhibits and demonstrations highlighting the work of MIT faculty, students, and alumni.

That evening President and Mrs. Reif hosted a gala dinner for members of the MIT Charter Society. Professor of Music Eran Egozy '93, MNG '99, introduced a performance by Janelle Sands '19 and Brice Huang '19, who demonstrated the musical technology game Cello Hero. This was followed by “Asking Fundamental Questions,” featuring Professor of Physics (emeritus) and Nobel Prize winner Rainer Weiss '55, PhD '62; Curtis and Kathleen Marble Professor of Physics Nergis Mavalvala PhD '97; and PhD student Maggie Tse telling past, present, and future stories about the Laser Interferometer Gravitational-Wave Observatory (LIGO). Amos Winter SM '05, PhD '11, professor of mechanical engineering, spoke about his work with mechanical design theory and tech solutions in a talk titled “Hands-On Problem Solving.” Vinod Vaikuntanathan SM '05 PhD '09, professor of computer science and artificial intelligence, and Andrew Lo, Charles and Susan Harris Professor of Management, demonstrated Splinter—which uses a new cryptographic primitive called Function Secret Sharing that protects users' queries on public data—in “Shaping the Future of AI and Computing.” Finally, Professor of Media Arts and Sciences Pattie Maes and graduate student Arnav Kapur discussed and demonstrated Alter Ego, a non-invasive, wearable, peripheral neural interface that allows humans to converse in natural language with machines, artificial intelligence assistants, services, and people without any voice. President Reif concluded the evening with a champagne toast to new MIT Charter Society members and the presentation of a special gift fabricated from a piece of the limestone from the original MIT Great Dome.

The following day, Chancellor Cynthia Barnhart SM '86, PhD '88, hosted the 2019 MIT Scholarship and UROP Brunch, bringing the Institute's most generous scholarship and UROP supporters together with scores of students who benefit from their support. In addition, donors who have made unrestricted campaign gifts of \$100,000 and above were invited. Heartfelt welcoming remarks were offered by Chairman Robert Millard, followed by a panel (The Student Voice) featuring MIT students discussing the positive impact of MIT scholarships and UROP opportunities.

The Tang Scholars Dinner, hosted by Martin SM '72 and Nadine Tang on December 7, brought Tang Scholars—past and present—together with members of the Tang family and special guests to reconnect with each other. Professor Fernández delivered a talk on “Nature and Tech: MIT's Unique Contributions to Climate Change and Biodiversity.”

The DRS team actively stewards almost 650 endowed and expendable scholarship funds benefiting more than 925 undergraduates. During the month of December, the team distributed more than 775 scholarship/endowment reports to scholarship stewardees. Packages for endowed and expendable funds comprised combinations of various components including biographies of scholars and sample scholar thank-you letters; a financial summary of the individual funds and their impact on the Institute; an information

sheet describing MIT's FY2018 endowment performance; a one-pager on MIT's Class of 2022 and an overview of students and financial aid; and cover letters from Executive Vice President Israel Ruiz SM '01 and Vice Chancellor Waitz. Many relationship managers took the opportunity to personalize and hand deliver the packages to their donors.

In March, the team distributed almost 500 student thank-you letters and videos to scholarship donors. The videos were posted on private online landing pages for viewing by the donors, and again many relationship managers personalized or hand delivered the letters of appreciation. Eighty percent of the 623 scholarship beneficiaries approached prepared a letter or video expressing their appreciation for the scholarship support they receive. Students were asked to write or talk about themselves, their MIT experiences (academic and extracurricular), and their future plans.

In addition to scholarship reporting, DRS produced 123 Division of Student Life (DSL) donor impact reports, 10 Office of Graduate Education (OGE) fellowship reports, and three provost fellowship reports. DSL stewardees received cover notes from program leaders, updates on the programs they supported, and testimonials from students on their experiences with those programs. OGE fellowship stewardees received a cover letter from Vice Chancellor Waitz, their fellow's thank-you letter and CV, and a financial report. New this year, delivery of scholarship and OGE fellowship reports was combined for individuals who are both fellowship and scholarship stewardees. Provost fellowship stewardees received a cover letter from Provost Marty Schmidt SM '83, PhD '88, the Ray and Maria Stata Professor of Electrical Engineering and Computer Science, along with their fellow's thank-you letter and CV.

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. DRS staff worked with relationship managers to curate recommendations and represented Resource Development in membership discussions with 16 department heads in partnership with the Alumni Association and the Corporation Office.

The DRS team continued to support the growth of the individualized stewardship plans program in partnership with the Office of Leadership Giving (OLG) and the Office of Philanthropic Partnerships (OPP). Staff met one on one with relationship managers to discuss their portfolios and the opportunity for thoughtful stewardship touches to support the strategic cultivation of donors. Over the course of the year, DRS also enhanced the tools and resources available to support the implementation and management of plans and tasks for relationship managers, including customized prompts from new plans and plan additions at proposal close. In partnership with the Information Technology team, DRS developed and launched a new report to anticipate key milestones in donor relationships with MIT, allowing ample time to plan for meaningful celebration and commemoration of significant fund anniversaries, important birthdays, and historical levels of cumulative giving to the Institute.

Correspondingly, in collaboration with the Communications team and the Office of Philanthropic Partnerships, DRS envisioned and realized a gift befitting the Institute's most generous donors and one that is uniquely MIT: these donors will be presented with

one of the glass oculus tiles from MIT's Great Dome restoration in a brass frame made in the MIT Foundry and accompanied by a customized book conveying the impact of that donor's generosity on MIT and describing the provenance of the oculus tile. This recognition effort is intended to acknowledge the exceptional role that these donors have played for MIT, thank them for their generosity, and further cultivate their relationship to the Institute by drawing upon and highlighting unique aspects of MIT and their role in its evolution, linking them to other transformative donors in MIT's history including George Eastman and Katharine Dexter McCormick.

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

### **Office of Philanthropic Partnerships**

The Office of Philanthropic Partnerships coordinates and leads MIT's principal gift fundraising efforts. The office nurtures the Institute's relationships with its most generous individual donors and cultivates and engages potential donors from around the globe who have the capacity to contribute \$5 million or more. Chief among OPP's responsibilities is the management of President and Mrs. Reif's Resource Development travel and strategy for select donor meetings. In addition, OPP works closely with colleagues to identify potential new MIT Corporation members and Institute volunteers and coordinates high-level prospect strategy discussions with colleagues from across the Institute.

In collaboration with colleagues, faculty, and Institute leaders, OPP achieved the following results in FY2019:

- Closed \$522 million in new gifts and new pledges—including gifts and pledges closed in collaboration with the Office of Foundation Relations (OFR)—contributing meaningfully to the Institute's record fundraising year.
- Prioritized philanthropic conversations with donors and prospects around the creation of the MIT Stephen A. Schwarzman College of Computing. The team secured \$54.3 million in gifts for the college in addition to Stephen A. Schwarzman's historic gift. Also, OPP worked closely with MIT senior leadership, Vice President Lucas, and Mr. Schwarzman and his team to develop, track, and update a robust pipeline for the college.
- Coordinated 65 appointments and events for President and Mrs. Reif (including international and domestic trips).
- Conducted 284 individual prospect meetings and events for other senior officers.

OPP continued to refine fundraising strategies for its seven priority regions (Boston, New York, West Coast, Asia, Europe, Latin America, and the Arab World, Turkey, and Israel), with a focus on MIT Campaign for a Better World priorities. OPP also closed a gift from the Instituto Alana and Ana Lúcia Villela to establish the Alana Down Syndrome Center at MIT and closed gifts for the Music Building, the President's Discretionary Fund, and the MIT Stephen A. Schwarzman College of Computing as fundraising across OPP began to shift to focus on the college.

Throughout the year, the team planned and executed a number of high-level events:

- A ceremonial signing for a \$40 million pledge to launch the Abdul Latif Jameel Clinic for Machine Learning in Health (J-Clinic)
- Meetings and dinners around the MIT China Summit and Executive Committee trip to Asia in November 2018
- Private dinners hosted by Mr. Schwarzman and by Eric Schmidt that served as an introduction to the MIT Stephen A. Schwarzman College of Computing for friends and alumni
- A Boston business roundtable to introduce local business leaders to the college
- A VIP dinner hosted by Provost Marty Schmidt on the eve of the college's launch event
- A VIP luncheon hosted by Anantha Chandrakasan, dean of the School of Engineering, during the college's launch event
- A ceremonial signing by Inditex and Pablo Isla for new gifts supporting the Department of Materials Science and Engineering, the Sloan School of Management, and the MIT-Spain Program
- The 2019 Lemann Day at MIT, including an MIT Sloan Fellows event featuring Jorge Paulo Lemann followed by a cocktail reception for the Lemann Fellows, the MIT Media Laboratory's Creative Learning project, and the MIT-Brazil Program

OPP planned and executed numerous high-level stewardship activities during FY2019. For example, the team:

- Assisted in the creation of a commemorative book for the MIT Stephen A. Schwarzman College of Computing launch celebration that will be presented to Mr. Schwarzman.
- Prepared monthly updates on the college for Mr. Schwarzman.
- Worked with colleagues in Resource Development to develop a new gift for individuals whose lifetime giving has surpassed the \$100 million threshold. As described above, the gift for these distinguished donors incorporates oculus tiles recovered from the MIT Dome renovation project along with a customized booklet.
- Began planning customized books to accompany the oculus tile milestone gifts for Mohammed Jameel '78 and Marilyn and James Simons '58.
- In partnership with Harvard, began planning a commissioned gift for Eli and Edythe Broad to mark the 15th anniversary of the Broad Institute in October 2019.
- Produced a mid-year report for first-time donor Hao Tang, sharing updates on the Tang Family Imaging Suite in MIT.nano and the Tang Family Catalyst Fund in the School of Engineering.
- Planned a commemorative book for the Firmenich family to mark the 40th anniversary of the Roger and Georges Firmenich Professorship of Natural Product Chemistry.



As it does each year, the team orchestrated MIT's participation in the 2019 World Economic Forum's annual meeting in Davos, Switzerland, bringing the Institute's key research to an international audience and establishing and advancing connections with prospective individual donors through an MIT reception and dinner as well as individual presidential appointments.

**Arundhati Banerjee**

**Executive Director, Office of Philanthropic Partnerships**

## **Office of Leadership Giving**

The Office of Leadership Giving 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 FY2019, OLG staff and MIT volunteers (CDC members) qualified 306 prospects, expanded activity in the non-alumni parent sector, and continued the previous year's expansion of international major gift fundraising efforts in Europe, South America, Mexico, and Asia. OLG's FY2019 new gifts and new pledges of \$126 million reached 157.5% of the original \$80 million goal. Overall fundraising for core MIT priorities continues to be very strong.

OLG's three regional teams organized 41 senior officer and faculty trips over the past year. In addition, nearly 40 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; 14 of these events took place in metropolitan New York and the Southwest, six on the West Coast, five in New England and the Midwest, and 10 on campus. A sampling of key events is offered below.

The MIT Parent Leadership Circle hosted several events during the year. First was an orientation breakfast on campus at which Chancellor W. Eric L. Grimson PhD '80—Chancellor for Academic Advancement and the Bernard M. Gordon Professor of Medical Engineering—welcomed close to 100 new parents to the MIT family. The event provided an opportunity to meet fellow MIT parents and learn important information about their students' time at the Institute. At the annual Family Weekend reception, the Parent Leadership Circle organized a lively discussion about the MIT Museum with director John Durant, director of collections Deborah Douglas, studio manager Seth Riskin 'SM 89, and director of programs Brindha Muniappan '94, PhD '01. During Campus Preview Weekend, the Parent Leadership Circle, the Alumni Association's Parents Association, and the MIT Club of Boston hosted a Friday evening reception for the parents of admitted students that offered them an opportunity to interact with other parents and meet Alumni Association parent connectors, Admissions Office educational counselors, and alumni.

Charlene Kabcenell '79, a life member of the MIT Corporation, hosted the semiannual Women in Science and Technology luncheon on January 17 in Palo Alto, CA. Maria T. Zuber—vice president for research and E. A. Griswold Professor of Geophysics—discussed her experiences as a woman in science, technology, engineering, and mathematics (STEM), including her appointment as the first woman principal investigator of a National Aeronautics and Space Administration (NASA) planetary mission. The second 2019 Women in Science and Technology luncheon was also held in Palo Alto on April 23. Kate A. Bergeron '93, MBA '13, and Connie Yang '03 hosted special guest Anette “Peko” Hosoi—associate dean of the MIT School of Engineering and Neil and Jane Pappalardo Professor of Mechanical Engineering—discussing her work as the cofounder of the MIT Sports Lab as well as her experiences as a woman in STEM.

Lisa and Michael Ullman '93 hosted a dinner on July 24 at Eno Terra restaurant in the Princeton, NJ, area at which a dozen alumni, spouses, and one rising senior applicant to MIT shared a lively discussion with Chancellor Grimson. On August 12, Stella and John Seo '88 hosted their annual summer sendoff at their home in Westport, CT, where Gilad Rosenzweig MCP '13, executive director of DesignX, welcomed 55 Class of 2022 entering first-year students and their parents to the MIT community. Deepa Javeri '00 and Munir Javeri '00 hosted a Course 6 lunch on September 27 at Ammos Estiatorio in New York City where Professor Asuman Ozdaglar SM '98, PhD '03—the Joseph F. and Nancy P. Keithley Professor and the head of the Department of Electrical Engineering and Computer Science—provided a departmental overview, highlighting the latest research and academic updates and discussing her vision for the future of MIT's largest department. William Park '93 hosted an evening at the Greenwich Country Club on October 3 featuring James DiCarlo—Peter de Florez Professor of Neuroscience, head of the Department of Brain and Cognitive Sciences, and director of The Core of the MIT Quest for Intelligence—who addressed the topic of intelligence and the brain. Professor DiCarlo was also the special guest at a breakfast hosted by Perry Ha '85 on March 14 in Palo Alto, where he offered an insider's view into how The Quest for Intelligence promotes synergy between science and engineering to advance the next breakthroughs in machine-learning algorithms as well as relevant research applications.

On January 25, Dalia and Ramzi Rishani '87 hosted a group of highly rated prospects at their home in London for a dinner and a talk titled “Hacking the Brain” by Professor Ed Boyden '99—Y. Eva Tan Professor in Neurotechnology, investigator at the McGovern Institute for Brain Research, and leader of the Synthetic Neurobiology Group. Rekha and Anil Kamath hosted a reception for MIT parents at their home in Los Altos, CA, on January 31 featuring Suzy M. Nelson, vice president and dean for student life, who shared her vision for student life and learning at MIT and provided updates on key student life initiatives, including student well-being and residential living. Dean Nelson was also the featured speaker at two Resource Development events in New York City. On March 14, Nicole and David Gruenstein hosted a reception for MIT parents at their home, and the next day Corporation Development Committee member Melissa Ko Hahn '90 hosted a luncheon at Estiatorio Milos.

On February 4, Brad Hu '84, SM '85, hosted 20 guests for a lunch and conversation with Michael Sipser—Donner Professor of Mathematics and dean of the School of Science—who shared the latest news from the school including the launch of the MIT Transiting

Exoplanet Survey Satellite (TESS) and its search for extrasolar planets, efforts to advance the science and engineering of intelligence, and the Aging Brain Initiative, which focuses on how the brain ages in health and decline. In New York, Simone and Mark Bye '78, SM '80, hosted an evening with Professor Paula Hammond '84, PhD '93—the David H. Koch Professor of Engineering and head of the Department of Chemical Engineering—on the topic of healing on the nanoscale. Resource Development and the Sloan School of Management organized a luncheon and talk for MIT and MIT Sloan women in London on March 14; the luncheon, hosted by CDC member Pappudu “Pop” Sriram '96, featured a talk by Fiona Murray, associate dean of innovation and the William Porter (1967) Professor of Entrepreneurship at Sloan.

Joel Hock '99 and Stacy Hock '99 hosted a cultivation reception at their Austin, TX, home on April 12 featuring Nicholas Roy, professor of aeronautics and astronautics, who spoke on “The Quest for Intelligence and MIT’s AI Initiative.” Michael Minnich '94, MBA '95, and Monica Tettamanzi hosted an event at their home in New York City on May 22 featuring Ebony Hearn '01, executive director of the Office of Engineering Outreach Programs (OEOP) who provided an overview of OEOP and engaged the guests in a discussion of diversifying the pipeline of STEM talent.

Judy and Dan Gilbert '91 hosted the West Coast Scholarship and UROP Brunch on May 19 in Palo Alto. This event, held each year on campus and on the West Coast, acknowledges the donors who recognize the vital role that scholarships play in opening the doors to an MIT education to talented students. Chairman Millard offered heartfelt opening remarks, followed by a panel of recent MIT graduates who spoke on the positive impact of MIT’s scholarship, UROP, and academic enrichment programs made possible by the generosity of MIT donors. To the extent possible, donors were seated with their scholars and UROP students.

In the greater Boston area, the Tech Breakfast series keeps alumni informed of the companies that have spun out of MIT’s entrepreneurial and inventive community, creates and strengthens ties among guests, and fosters additional connections with the Institute. This year’s featured start-ups included Accion Systems Inc., a pioneer in scalable propulsion technology; Brain Power, which creates software that works with computerized glasses to teach children and adults with autism and other brain-related challenges how to better interact with those around them; and Commonwealth Fusion Systems, a breakthrough energy start-up working on the fastest path to commercial fusion energy.

**Christina Toro**

**Executive Director, Office of Individual Giving**

## **Office of Gift Planning**

The Office of Gift Planning (OGP) engages donors in estate planning conversations involving life income gifts (including charitable remainder trusts, charitable gift annuities, and pooled income funds), bequests, and gifts of complex assets. OGP also

works with donors and their advisors on structuring testamentary gifts through wills, living trusts, and designations from qualified retirement plans. The team provides support to the work of frontline staff in the Office of Leadership Giving, the Office of Philanthropic Partnerships, the Annual Fund in the MIT Alumni Association, the five schools, and departments, centers, and institutes throughout the MIT campus. In addition to assisting 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 of gift planning prospects.

MIT's new Donor-Advised Fund (DAF) was established last year as an option for alumni, friends, and supporters of the Institute 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. The DAF gained momentum during FY2019, increasing from \$1.5 million to \$12.3 million in contributions over the year.

OGP marketing activity continued throughout the year with the semiannual publication of *Corridor*, a newsletter providing insights into planned giving strategies that can help donors meet financial goals while supporting the mission of MIT. Featured in the fall 2018 issue were two couples who have invested in charitable remainder unitrusts: Bob Johnson '63 and Lisa Reich, and Doug King '78 and Sharon King '78. Another article described the establishment of the Jerry L. Adams '62 Memorial Scholarship by Karen Adams, recently retired as fellowships coordinator at the Georgia Institute of Technology, and there was a Q&A on the new federal tax laws with Lorry Spitzer of the Office of the General Counsel. In the spring 2019 issue, three donor couples discussed why planned giving—whether through a deferred charitable gift annuity, charitable remainder unitrust, or IRA (individual retirement account) distribution—was the right choice for them and their families. The featured couples were Bruce Heflinger '69, SM '71, PhD '80, and Mary DeMasters; Maurice and Heather Cogdell '89; and Eberhard Wunderlich SM '75, PhD '78, and Shahla Wunderlich PhD '78. Also in this issue, Seth Alexander, president of MITIMCo (MIT Investment Management Company), answered questions about what makes MIT's endowment so distinctive.

The Katharine Dexter McCormick Society (KDMS) honors individuals who have chosen to support the Institute's mission through bequests, life income funds, and other planned gift arrangements. During FY2019, KDMS organized two events for its members. The annual appreciation brunch, hosted by KDMS chair Michael Dornbrook '75, featured 2017 Nobel Laureate Rainer Weiss '55, PhD '62, professor emeritus of physics, who spoke on "Exploring the Universe with Gravitational Waves." During the winter, KDMS collaborated with the Alumni Association's Cardinal and Gray (alumni who have reached the 50th anniversary of their graduation), Emma Rogers (widows and widowers of MIT alumni), and William Barton Rogers (leadership-level annual donors) societies to organize a winter lecture and luncheon in Palm Beach, FL; the event featured Richard Binzel, professor in the Department of Earth, Atmospheric and Planetary Sciences and Margaret MacVicar Faculty Fellow, who enlightened attendees with his presentation "Undaunted Exploration: Building NASA Missions from the Ground Up—To Pluto and Beyond!"

OGP giving activity was exceptionally strong during FY2019, as follows.

- Life income gifts: \$32,565,416
- Donor Advised Fund contributions: \$12,324,624
- Outright gifts: \$997,837
- Outright pledges: \$3,171,350
- Planned gift pledges: \$1,239,769
- Realized bequests: \$22,171,165
- Credited bequests: \$27,120,291
- Memorial gifts: \$9,214,872

Also, there were 25 credited bequests, and 121 new Katharine Dexter McCormick Society members were added.

**Amy Goldman**  
**Senior Director, Gift Planning**

### **Office of Foundation Relations**

As one of the three front-facing fundraising units in Resource Development, the Office of Foundation Relations identifies, cultivates, and engages foundations to maximize support to the Institute from this sector. OFR 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 a focus on foundations with goals aligned with the MIT Campaign for a Better World and works in collaboration with the Campaign Office on strategies for these discussions. OFR also supports other high-priority special projects for the Institute related to foundations.

In addition to working with the Office of Philanthropic Partnerships on dually managed relationships, OFR works with colleagues across Resource Development, with the Offices of the President and the Vice President for Research, with other senior leaders, and with deans, faculty, and development and program staff in the five schools. OFR also works closely with campus units including the Offices of Sponsored Programs, the General Counsel, the Recording Secretary, Corporate Relations, and the Technology Licensing Office.

Key activities for OFR staff include arranging visits to the campus for foundation representatives, coordinating and staffing meetings between senior officers and foundation leaders and program staff, engaging faculty and staff in developing strategies and proposals and planning meetings, identifying and qualifying new foundations and philanthropic entities, stewarding foundation donors, and communicating with senior leaders, faculty, and development staff about relevant foundation opportunities and current trends in the field.

During the past year, OFR staff helped drive strategies, assisted in staffing senior officer interactions, and played lead roles in numerous significant foundation approaches, including with most of the major foundations in the United States and several international entities. OFR's key results in FY2019, achieved in partnership with colleagues, faculty, staff, and senior leadership, included the following:

- \$91.7 million in new gifts and pledges (including 27 gifts of \$1 million or more)
- 16 presidential foundation visits with OFR involvement
- 28 senior officer/dean foundation visits with OFR involvement
- 103 additional foundation visits and significant interactions

The team made important organizational advances in FY2019 with a significant strategic planning effort that framed next steps for the office's organizational development. Building on existing processes, OFR refocused efforts involving collaboration with the Office of Philanthropic Partnerships on dually managed relationships. In addition, the team implemented new tactics related to outreach for the MIT Stephen A. Schwarzman College of Computing.

**Alicia Carina Sanchez**  
Executive Director, Office of 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. Equally important was the office's focus on strengthening collaborative relationships with MIT's Office of the President, the Alumni Association, the Office of the Vice President for Communications, *MIT News*, the five schools, the new MIT Stephen A. Schwarzman College of Computing, and various departments, labs, and centers.

During FY2019, the Communications and Events team increased to 17 the total markets reached through [Campaign for a Better World regional events](#) and revisited three major markets: New York, San Francisco, and Los Angeles. On October 10, Provost Marty Schmidt and Charlene Chuang '05, president of the MIT Club of New York and executive vice president of the New York Junior League, hosted more than 400 alumni and friends in the New York metropolitan area for the panel discussion Teaching, Learning and Living. In conjunction with the MIT China Summit, more than 250 alumni and guests attended a November 12 "fireside chat" between President Reif and Lilly Kam '04, senior product manager of i.am+, as part of the Better World event series. Attendees also had the opportunity to connect with 11 distinguished MIT faculty and senior leaders during a post-event reception. During the first week of February, events in San Francisco and Palo Alto hosted by Chancellor Grimson drew more than 700 MIT

alumni and friends for a discussion about the science of teaching and learning. The MIT Better World tour visited Los Angeles and San Diego in March at events featuring Institute leaders, faculty, alumni, and students speaking about MIT's pathbreaking work in environment, energy, and sustainability to make a better world.

The Communications and Events team collaborated with the Donor Relations and Stewardship team to produce a full weekend of events (as described above) for top donors to the Institute on April 6 and 7. More than 100 members of the MIT Charter Society, which recognizes philanthropic commitments to the Institute of \$1 million or more, participated in a daytime academic program with presentations by and discussion opportunities with leading faculty members whose work focuses on artificial intelligence and computing, as well as an interactive luncheon with MIT students demonstrating their innovative work. An evening gala recognized Charter Society members for helping to make possible the trailblazing, problem-solving work of Institute faculty and students that spans decades and disciplines. The Scholarship and UROP Brunch the next day brought together more than 250 student scholarship recipients with the donors and friends who support scholarships.

The team produced two issues of the *MIT Spectrum*, a magazine connecting alumni, donors, and friends to MIT's vision, impact, and exceptional community. The fall 2018 issue focused on the Kendall Square Initiative, covering elements of the new gateway to MIT including new homes for the Office of Admissions and the MIT Museum, a new graduate student residence, open spaces, and a hub to connect faculty and students to the area's growing innovation and entrepreneurship ecosystem. The issue also featured stories on breakthroughs and insights related to exoplanetary astronomy and bringing space technology down to earth. The winter 2019 issue featured stories on scholarship recipients whose time at MIT has been literally a gift made possible by donors and the reward that scholarship donors receive when they meet the bright, enthusiastic scholars who aim to transform the world with the opportunities that an MIT education provides. Also included were stories on the advanced work made possible by the MIT.nano building's new chemistry labs, policy and regulatory issues expected to arise from breakthroughs generated by the SPARC experiment to build the first fusion device generating more energy than it consumes, efforts to improve climate predictions through machine learning, and the structure and cross-disciplinary composition of the new MIT Stephen A. Schwarzman College of Computing.

Overall, the team completed 833 marketing communications and design projects to support the Institute's highest fundraising priorities, wrote or edited 26 proposals and concept notes that contributed to \$42.6 million in donor gifts, assisted with the proposal for the Schwarzman College of Computing, developed event marketing and production materials, and logged more than 40,000 visitors to and almost 100,000 page views on the MIT Campaign for a Better World website. Highlights of the numerous projects completed include a fundraising narrative and viewbook about the MIT Schwarzman College of Computing; a one-pager for prospects and an FAQ for staff on the MIT Quest for Intelligence; a new suite of materials for fundraisers to use in conversations with donors about how endowed scholarships, fellowships, and professorships are administered and stewarded; and a brochure ("Enhancing MIT's Central Hub for Student Life") describing MIT's vision to modernize Building W20, the Stratton Student Center.

In addition, the team produced a new fundraising suite, including a video, about how the Kendall Square transformation will enable innovation and growth across the MIT community and connect MIT to Cambridge and beyond in a deeper way than ever before.

Altogether, the team planned and implemented 96 high-level engagement, cultivation, and stewardship events on campus and around the world and provided critical support for the February 2019 on-campus celebration of the MIT Stephen A. Schwarzman College of Computing. Other key events included the launch of the J-Clinic; the Corporation Development Committee annual meeting and six domestic and international CDC regional meetings; President Reif's dinner and reception at the World Economic Forum in Davos, Switzerland; the Katharine Dexter McCormick Society's annual appreciation brunch; Orientation and Family Weekend events for parents of incoming first-year students; the annual Scholarship and UROP Brunch; two Women in Science and Technology luncheons; receptions for the Bose Fellows, Jacobs Fellows, Tang Scholars, Siebel Scholars, and Lemelson-MIT Prize winners; 29 receptions and dinners hosted by high-level donors at their homes or local venues; and more than a dozen Office of Philanthropic Partnerships campus visits, signing ceremonies, and receptions with highly rated donors, prospects, and other visitors.

The Communications and Events team garnered five 2019 CASE (Council for the Advancement and Support of Education) awards, as follows.

- National Platinum Award (finalist for the MIT Campaign Roadshow Series)
- National Circle of Excellence Gold Award (for the Corporation Partners Program invitation design)
- Northeast District Gold Award for Best Practices in Communications and Marketing (for the Campaign Roadshow Series)
- Northeast District Silver Award for Special Events (for the Theater Arts Building opening event)
- Northeast District Bronze Award for Fundraising Materials (for the MIT Kendall Square fundraising suite)

The team looks forward to another stellar 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 builds on the synergies that exist across the RD Information Technology and Prospect Development teams, with collaboration in the areas of business intelligence, modeling, information delivery, and



related processes, as well as optimizing prospect 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 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, SIM convenes a strategic information priorities committee of key stakeholders from all of the units in Resource Development as well as other constituencies from the Alumni Association, the Office of the Recording Secretary, and the Sloan School of Management.

A key accomplishment during FY2019 was the development of a new portfolio management tool designed to provide fundraisers with an easy view of "needed actions" to optimize their portfolios and to offer insight into progress toward goals. In addition, the Prospect Management team's role in determining the most appropriate assignments was enhanced, prioritizing prospects with an eye toward capacity and affinity and incorporating the Sloan Development Office and the Annual Leadership Giving Team into the process.

New security protocols were implemented in association with the General Data Protection Regulation agreed upon by the European Parliament and Council as the primary law regulating how companies protect the personal data of European Union citizens. The effort included outreach to and education of all users of donor and alumni data, a full security audit and penetration testing, moving fileservers behind a virtual private network, reorganizing access control lists to streamline the auditing process, enhancing our monitoring of user access and email lists, automating the capture and management of signed confidentiality agreements, and developing secure workplace guidelines to help staff ensure stewardship of sensitive donor and alumni information.

SIM initiated the process of selecting a new events tool to be used across RD and AA, to replace existing disparate tools on multiple platforms. This will involve reviewing and selecting a hosted event vendor that can be used to support all events from invitation and online registration through closing. The implementation of this tool will include comprehensive integration with AdvanceWeb, MIT's alumni and donor information system. The system, scheduled for completion during FY2020, will need to scale for both small high-touch events and larger-scale events.

Other accomplishments during FY2019 included the development of the Milestone Stewardship Tracking Report, which tracked milestones in donor relationships with the Institute (such as fund anniversaries and giving thresholds) for planning of strategic stewardship activities in recognition of those milestones; the development of an advancement due diligence process in conjunction with the Office of the Recording Secretary and the Office of Corporate Relations; the creation of a senior management dashboard that tracks progress on key fundraising touch points such as solicitations, proposals, gift closings, and senior officer visits and travel; improvements in the visiting

officer notification process; the creation of a mapping tool encompassing density of alumni markets to enable planning of the FY2020 campaign roadshows; and the redesign of several internal tools including the Advancement Calendar and the weekly email digest of announcements from The Campaign Toolkit, the advancement intranet.

MIT's enterprise Advance alumni and donor information system is more than 25 years old and will no longer be supported within the next few years. With this in mind, SIM is actively working with internal partners, including Information Services and Technology (IS&T), and external partners to evaluate the technology landscape and build a better understanding of future options for our fundraising systems and the many related systems and integrations that have been developed over the past 20 years. During FY2019, the Advancement Technology Road Map Committee worked with a vendor, Brainsell, to evaluate the MS Dynamics and Salesforce technology ecosystems, as well as evaluating the three leading enterprise fundraising systems currently available on the market. We have also been in regular contact with our peers, including Princeton University, Harvard University, and Stanford University, as they are also on the same Advance Web platform and are looking at options.

On the infrastructure side, SIM migrated to IS&T's central Tableau servers as well as enterprise computer management software to save costs and streamline deployment of equipment. In addition, we deployed IBM Watson email marketing, enabling us to update to an improved platform and cost share with the Alumni Association. SIM also streamlined the internal staff onboarding/off-boarding process by condensing and restructuring Advance Web training to enable targeting of content to roles, tweaking existing onboarding forms and communication workflows, and aligning with the processes used by the Human Resources and Strategic Talent Management staff. In conjunction with the Alumni Association Records Office and the Office of the Recording Secretary, an anonymous records working group was established to improve security, tracking, and other existing processes relating to anonymous donors.

During FY2019, SIM staff:

- Completed 1,077 trip and visit briefings
- Completed 19,522 prospect update tickets
- Conducted 2,207 capacity evaluations
- Identified 1,238 new prospects (of whom 745 were MIT alumni)
- Completed 7,599 information technology service and programming requests
- Completed 1,768 project-related requests

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

## Office of Human Resources and Strategic Talent Management

The Office of Human Resources and Strategic Talent Management (HR/STM) assists the Resource Development and Alumni Association senior teams in attracting quality talent, ensuring their strategic engagement, and guiding their performance and professional development in support of MIT's advancement goals. The HR/STM team supports the work of all program areas within RD and AA 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 AA and drives the effort to create a comprehensive talent management strategy for the campaign and beyond.

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.

HR/STM offered training sessions on preventing sexual misconduct that provided attendees with a framework through which to navigate conversations on the topic with alumni, donors, colleagues, and friends; an understanding of the ways in which sexual violence shows up in our work as advancement professionals; and information on practical ways employees and managers can contribute to a culture of safety and respect. In addition, an interactive workshop led by Daena Giardella of the Sloan School of Management demonstrated powerful approaches for responding effectively to inappropriate behaviors and comments that convey harassment, bias, bullying, or other incivility through practical bystander intervention skills and speak-up steps that will enable individuals to constructively influence a situation.

Feedback from employee engagement surveys, exit interviews, and check-ins with employees indicated that managers want more practice, resources, and tools on how to effectively have career conversations with their staff. In response, HR/STM offered a workshop on conducting effective career discussions to help managers enhance the quality and frequency of career development conversations, encourage staff to ask questions about their growth, teach employees how they can take ownership of their career development, and provide resources and tools.

HR/STM implemented several enhancements to provide better onboarding for our new employees, including production of a new welcome brochure spotlighting resources on working at MIT and coordination of monthly orientation sessions that replaced the more haphazard introductions previously managed by individual units. These sessions provide an overview of the Campaign for a Better World; address policies and practices related to finance, HR, and privacy and confidentiality; and introduce important information about preventing sexual misconduct and engaging in emergency preparedness. As a complement to the monthly sessions, RD members and AA senior leaders participate in a quarterly discussion in which new employees have the opportunity to learn about the higher-level goals of all of the units, followed by a new employee welcome reception for all Resource Development and Alumni Association staff.

AA and RD strive to inspire a culture of employee engagement for our community and assess that engagement by implementing the Gallup Q12 Employee Engagement Survey. This 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.

Using input from a staff survey, HR/STM took a new approach during FY2019 to the Resource Development Infinite Mile Awards program, adding five new categories:

- Service Excellence—recognizes an employee or team that continually seeks to understand the needs of those who depend on us and then exceeds their expectations.
- Rock Star Performance—recognizes an employee who far exceeds performance expectations.
- All for One & One for All—recognizes departmental or cross-departmental groups that facilitate, promote, and demonstrate teamwork and collaborative efforts.
- Unsung Hero—recognizes an employee or team that consistently goes above and beyond without fanfare.
- Leader of the Year—recognizes a manager who builds relationships, motivates others, provides a sense of purpose for her or his staff, and champions change effectively through formal leadership.

In addition, many staff nominated colleagues for Spotlight Awards, which serve as a way to provide immediate appreciation in recognition of the contributions of others and an ongoing opportunity to “shine the spotlight” on the special efforts of co-workers when they go beyond the call of duty.

Both RD and AA used the Institute’s performance development and review tool for goal setting, mid-year check-ins, and year-end appraisals of performance and progress toward goals. Resource Development sponsored Institute-wide membership in CASE. For more than 10 years, Resource Development has demonstrated its support of the broader community by donating to a local nonprofit organization during the winter season. Each year, we work with MIT’s Office of Government and Community Relations to identify a community organization that needs extra help, and this year we chose Tutoring Plus, one of the longest-running out-of-school-time academic programs for Cambridge students.

**Ellen Gilmore**

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

## Finance and Operations

The Finance and Operations (F&O) team is a shared services unit that supports all program areas within Resource Development and the MIT Alumni Association through strategic allocation and management of financial resources, budget reporting and analysis, administrative operations, and facilities management. The F&O team continued to provide responsive and effective service to all RD and AA units, emphasizing collaborative planning and teamwork to meet their goals.

During FY2019, senior members of the F&O team supported the leadership of both RD and AA in managing the strategic planning and budget allocation process. In addition, they collaborated closely with the Human Resources and Strategic Talent Management team to codify processes including a more structured approach to tracking and allocating open positions across RD. The F&O team also provided key support to the Alumni Association CEO in communicating and implementing the strategic objectives of the AA board of directors.

Senior members of the team worked with staff from the Office of the Vice President for Finance and the Office of the Recording Secretary on quarterly updates of the comprehensive campaign cost and gift forecasting dashboard, oversaw all contracting and financial management of the FY2019 campaign roadshows, 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 2018 Internal Revenue Service Tax Form 990, and participated in the annual Voluntary Support of Education Survey managed by CASE. With this information as a ready resource, the team now serves as the first point of contact to coordinate responses to all requests for advancement benchmarking surveys from other institutions.

Upon the retirement of MIT's long-time recording secretary and director of gift administration, the Finance and Operations executive director collaborated with MIT's vice president for finance on assessments and interim management of the Office of the Recording Secretary and recruitment of a new director. He also collaborated with the executive director of Human Resources and Strategic Talent Management on planning and successfully implementing a new shared services HR/STM team for the Alumni Association and Resource Development. The director of finance served in her third and final year as vice chair of the Administrative Advisory Council II, an Institute-wide group that provides a formal mechanism for administrative areas contemplating change.

Over the course of the year, the F&O and HR/STM teams made presentations on the subject of demystifying budget and compensation to several units of Resource Development to help staff better understand MIT's budget process and compensation guidelines. The regular business of budget planning management, forecasting, financial reporting and analysis, interpretation of MIT financial policies and procedures, and ensuring audit compliance continued apace.

After the hiring of a new operations assistant, F&O conducted a building-wide assessment of maintenance needs and continued space planning and allocation work to ensure ergonomically friendly and appropriate workspace needs in both Building W98

(where RD and AA are co-located) and Building W20 (where the AA “Tech Callers” have their offices). Over the course of the year, the team coordinated 18 interoffice moves, 41 office reconfigurations, 25 requests for small- and large-scale paint work, and 376 building maintenance requests. The office green team sponsored a Green Week in Building W98, hosting events to promote sustainability including a composting competition, a reusable office supply exchange, and a seed planting party.

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