

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 a robust year of philanthropic support in fiscal year 2020 and brought the total in the Campaign for a Better World to a milestone \$5.7 billion, 95% the Campaign's \$6 billion goal. This achievement is the culmination of efforts by faculty, senior staff, and the over 500 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 FY2020 are as follows:

New gifts and pledges for FY2020 totaled \$540 million, marking the sixth straight year of surpassing the \$500 million goal.

Totals for the previous five fiscal years are as follows:

- \$939 million in FY2019
- \$728 million in FY2018
- \$570 million in FY2017
- \$516 million in FY2016
- \$507 million in FY2015

Cash gifts for FY2020 totaled \$500 million. Cash gifts comprise cash and the fair market value of noncash gifts received in full during the fiscal year, while new gifts and pledges include outright cash gifts and new multiyear pledges to pay.

Cash gifts and the fair market value of noncash gifts for the previous five fiscal years are as follows:

- \$612 million in FY2019
- \$498 million in FY2018
- \$683 million in FY2017
- \$428 million in FY2016
- \$450 million in FY2015

During FY2020, 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 three regions. Organized in collaboration with the MIT Alumni Association, events in Atlanta, GA; London; and Westchester County, NY; provided 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.

Resource Development rose to the challenge and disruption presented by the COVID-19 pandemic to maintain engagement with donors and prospects in a number of ways. In response to the outpouring of concern and offers of support from alumni and friends, several new funds were created to support MIT's efforts to address this public health crisis. The MIT COVID-19 Emergency Fund aids MIT's response to help with the COVID-19 crisis through the provision of equipment, space, expertise, and other resources to local area hospitals and health care providers, supplementing Institute resources being applied to these immediate medical needs. The MIT COVID-19 Research Fund supports MIT faculty and researchers addressing various aspects of the COVID-19 pandemic, including vaccine development, portable ventilators, AI solutions, and improved personal protective equipment. And the preexisting Student Life, Wellness, and Support Fund addresses student financial needs that have been exacerbated by the crisis, in addition to ongoing efforts focused on student wellness, mental health, and support services. As of August 6, 2020, these funds have raised more than \$7.6 million.

Although numerous prospect cultivation trips and visits with senior leaders were cancelled due to COVID-19, RD implemented new, creative processes for gift acknowledgments, virtual event management, meetings, and information sharing, and spearheaded meaningful new communications to help alumni and friends stay connected with the impact they are making on the MIT community. Virtual engagement opportunities via videoconference and telephone were scheduled as appropriate for President Reif and other senior leaders to solicit gifts for MIT, and steward MIT's most generous donors, as well as to cultivate new prospects' interest in MIT's philanthropic priorities. Presidential and senior leader gift acknowledgements to donors were distributed primarily through email.

Over the year, Resource Development arranged 393 on-campus visits by prospects and donors with 85 faculty, deans, and senior administrators. In addition, RD arranged 318 trips for 27 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 and virtual events for alumni and friends in regions across the globe.

Julie A. Lucas
Vice President, Resource Development

Office of Philanthropic Partnerships

The Office of Philanthropic Partnerships (OPP) coordinates and leads MIT's principal gifts fundraising efforts. The office nurtures the Institute's relationships with its most generous individual donors and cultivates and engages potential donors from around the globe who have the capacity to contribute \$5 million or more. Chief among OPP's responsibilities is the management of Rafael and Christine 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.

OPP continued to work closely with the schools and College to implement its fundraising strategies, emphasizing core priorities of the MIT Campaign for a Better

World, with a special focus on the MIT Stephen A. Schwarzman College of Computing (SCC). In collaboration with colleagues, faculty, and Institute leaders, the team achieved the following results in FY2020:

- Closed \$101,838,922 in new gifts and pledges (includes amounts closed in collaboration with the Office of Foundation Relations)
- Prioritized philanthropic conversations with donors and prospects around the creation of the MIT Schwarzman College of Computing, securing \$14,258,334 in gifts for the College in the past year (out of a total of \$36,075,295 raised) and collaborating with MIT senior leadership, Mr. Schwarzman, and his team to develop, track, and update a robust pipeline for the College
- Other notable gifts closed during FY2020 were the \$10 million gift by Takeda Pharmaceutical Company for fellowships in the School of Engineering and the \$10 million gift by Hamid Moghadam '77, SM '78 and Christina M. Gwatkin to name the Earth and Environment Pavilion (Building 54 addition)
- Coordinated 52 appointments and events (12 of which were virtual) for Rafael and Christine Reif
- Conducted 195 individual prospect meetings and events (29 of which were virtual) for other senior officers

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

- On behalf of Fady Jameel, OPP organized the Jameel-Toyota scholars welcome luncheon and celebration of the 25th anniversary of the scholarship, hosted by Cynthia Barnhart SM '86, PhD '88 with remarks by President Reif.
- Stephen Schwarzman hosted a dinner at his home in New York to introduce high-level prospective donors to Daniel Huttenlocher SM '84, PhD '88 inaugural dean of the SCC.
- Rafael and Christine Reif hosted José Antonio Fernández and the FEMSA board members to a dinner at Gray House on October 30, 2019 to recognize and thank Fernández for contributing his time as a member of the MIT Corporation, the Division of Student Life Visiting Committee, and the Undergraduate and Graduate Education Visiting Committee, as well as for his generosity in supporting so many areas of the Institute.
- OPP organized the seventh annual reception to honor the Professor Amar G. Bose Fellows, at which President Reif and Judy Bose, widow of Vanu Bose '87, SM '94, PhD '99 offered opening remarks.
- Elaine and Alex Shing '00 hosted a special dinner at their home on December 12, 2019 featuring Julie Shah '04, SM '06, PhD '11 associate professor of aeronautics and astronautics, leader of the Interactive Robotics Group in the Computer Science and Artificial Intelligence Laboratory, and associate dean, Social and Ethical Responsibilities of Computing, SCC. Professor Shah engaged guests in a discussion entitled "The Ethical Implications of AI," based on her interdisciplinary work weaving social and ethical considerations into the fabric of the SCC's educational mission, research activities, and external engagement.

Resource Development participated in the planning and staffing of a trip by Chancellor for Academic Advancement W. Eric L. Grimson PhD '80 to the World Economic Forum Annual Meeting in Davos, Switzerland, on January 23, 2020 where he hosted a private reception, providing the opportunity for 120 guests to interact with eight MIT faculty.

Despite the campus shutdown in the spring due to the COVID-19 pandemic, OPP aided senior officers in maintaining contact with the Institute's most generous donors through virtual means, including a meeting for President Reif with Marilyn and James Simons '58 following a half-day event organized by the Simons Center for the Social Brain on May 15, 2020; and a virtual meeting hosted by Rafael and Christine Reif to celebrate a milestone event in the life of Barrie Zesiger, life member emerita of the MIT Corporation. President Reif and Chancellor Grimson welcomed Irwin and Joan Jacobs to a virtual gathering acknowledging their 20th year of support for the Irwin Mark Jacobs (1957) and Joan Klein Jacobs Presidential Fellowship.

OPP also developed short documents designed for Associate Provost Richard Lester PhD '80 to share with prospects at the \$4 million to \$5 million level who are interested in MIT's burgeoning climate initiative.

Pivoting in April to a virtual strategy of engagement with its external communities, OPP launched a series of high-profile COVID-19 roundtables and webinars to engage some of MIT's closest friends and allies in a community dialogue and give them direct access to key MIT experts who are working to understand and rapidly develop solutions for the disease. First in the series was "MIT and COVID-19: Forecasting What's Next for Science, Medicine, and the Economy," followed by "The Promise and Perils of Health Care, Medical Engineering, and the Supply Chain." In June, President Reif and Stephen Schwarzman co-hosted an exclusive interactive roundtable with 13 of OPP's top prospects: "MIT Schwarzman College of Computing: Catalyzing Solutions in a Time of Pandemic."

In FY2021, the OPP team will respond to the challenges of fundraising during a pandemic by identifying counter-cyclical donors whose financial position may have improved; cultivating donors with donor advised funds whose interests align with MIT's priorities; maintaining more frequent, positive, forward-looking communication with donors; intensifying stewardship efforts; and concentrating on GIB relief with donors whose focus has shifted away from buildings toward people and research. In addition, the team will focus on the end of the Campaign for a Better World, soliciting and closing capstone gifts for the highest Campaign priorities from alumni and past donors. OPP will also begin to build the base for the next campaign by identifying existing and new donors for emerging priorities.

Arundhati Banerjee

Executive Director, Office of Philanthropic Partnerships

Office of Individual Giving: Leadership Giving

The Office of Leadership Giving (OLG) cultivates and stewards alumni, parents, and friends capable of making gifts primarily in the range of \$100,000 to \$5 million and, in certain cases, higher. It engages MIT alumni and raises money for core Institute

priorities—unrestricted funds, scholarships, fellowships, professorships, and capital campaigns. Additionally, OLG stewards existing MIT donors to encourage future gifts, and continuously and efficiently builds the pipeline of MIT donors. OLG collaborates with other units in Resource Development, the MIT Alumni Association, school and College development offices, the Office of the President, and the Office of the Chairman of the Corporation, as well as deans, department heads, and volunteers, both domestically and internationally.

During FY2020, OLG staff and some MIT volunteers qualified 309 new prospects, expanded fundraising in the non-alumni parents' sector, and exceeded major gift fundraising goals. To engage and cultivate MIT alumni prospects, OLG's three regional teams planned and executed 30 senior officer and faculty trips and 16 cultivation events (five in metro New York and Southwest regions, six on the West Coast, three in New England and the Midwest, and two on campus).

Despite a challenging external environment in FY2020, OLG staff forged ahead with thoughtful and effective fundraising strategies. FY2020 successes include the following:

- \$120.1 million in new gifts and pledges
- Exceeded the original goal of \$75 million by 160%
- Met range of annual goal of \$100 million to \$150 million
- Approximately \$6 million raised per OLG fundraiser

Examples of engagement and cultivation events are as follows:

Resource Development's Parent Leadership Circle (PLC), managed by OLG, created the PLC board during FY2020. The group convened for quarterly board meetings during the year, placed welcome calls to Class of 2023 parents in the fall, and served as resources for prospective Class of 2024 families during virtual Campus Preview Weekend in April. Outreach and cultivation events for parents of current and incoming students included such participants as Chancellor for Academic Advancement Eric Grimson, Erin Przybocki, Vice Chancellor for Undergraduate and Graduate Education Ian Waitz, and Senior Associate Dean and Director of the Office of Experiential Learning Kate Trimble. The Parents Leadership Circle newsletter was mailed from April to June to update members on how MIT was battling the pandemic.

MIT friends Michael and Victoria Bershadsky hosted a reception on the science of intelligence and the future of AI on September 12, 2019. James DiCarlo—Peter de Florez Professor of Neuroscience, head of the Department of Brain and Cognitive Sciences, and director of the Core of the Quest for Intelligence, and Josh Tenenbaum PhD '99—professor of brain and cognitive sciences, provided research updates.

Eran Broshy '79 hosted a luncheon on September 17, 2019 in New York featuring Susan Hockfield, MIT president emerita and professor of neuroscience, speaking on highlights from her new book, *The Age of Living Machines: How Biology Will Build the Next Technology Revolution*.

Shilpa and Arvind Sanger hosted a gathering at their home on October 17, 2019 for donors and prospects in New York with Melissa Nobles, Kenan Sahin Dean of the School of Humanities, Arts, and Social Sciences.

Sayuri Sharper '81, SM '82 hosted a reception and intimate discussion of Professors Abhijit Banerjee and Esther Duflo's latest book, *Good Economics for Hard Times* on February 13, 2020 in San Francisco. Mary Ann Bates, executive director of the Jameel Poverty Action Lab North America, facilitated the discussion.

Charlene Kabcenell '79 life member of the MIT Corporation and founder of the semiannual Women in Science and Technology luncheon series, hosted events featuring Cynthia Breazeal SM '93, ScD '00 professor in media arts and sciences, in San Francisco on January 29, 2020 along with Sally X. Yu '00 and in Menlo Park, CA, on January 30, 2020. A third luncheon scheduled for April 16, 2020 was cancelled due to COVID-19.

In the greater Boston area, the Tech Breakfast series continued to keep alumni informed of the companies that have spun out of MIT's entrepreneurial and inventive community, create and strengthen ties among guests, and engage MIT alumni. This year's featured startups included Indigo Technologies, Embr Labs, and Sherlock Biosciences.

The spring campus visit series MIT Here > Now > Next, scheduled for April 24, 2020 to bring together a set of highly engaged prospects with a notable roster of MIT speakers was cancelled due to COVID-19.

In FY2021, OLG will continue to focus on core Institute priorities of unrestricted funds, scholarships, fellowships, professorships, and capital campaigns; continue to strengthen outreach to MIT parents; expand quality and quantity of virtual events; continue collaborations with school, College, and departmental fundraising staffs; retain talented and high-performing fundraising staff; and work with the Corporation Development Committee (CDC) office to refocus the activities of CDC volunteers.

Christina Toro

Executive Director, Office of Individual Giving

Office of Individual Giving: Gift Planning

The Office of Gift Planning (OGP) engages donors in estate planning conversations involving life-income gifts (including charitable remainder trusts, charitable gift annuities, and pooled income funds), bequests, and gifts of complex assets. OGP also works with donors and their advisors on structuring testamentary gifts through wills, living trusts, and designations from qualified retirement plans. The team provides support to the work of frontline staff in the offices of Leadership Giving and Philanthropic Partnerships; the Annual Fund in the MIT Alumni Association; the five schools and the College of Computing; and departments, labs, and centers 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 of gift planning prospects.

MIT's Donor-Advised Fund (DAF) is an option to 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. During FY2020, the DAF gained momentum, increasing from \$12.3 million to \$22.3 million in contributions over the year.

OGP marketing activity continued throughout the year with 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. The fall 2019 issue featured Jeffrey Steinfeld '62 professor emeritus of chemistry, who established the Ann and Paul Steinfeld Memorial Fellowship. Named for his parents, the fellowship is partially supported through a charitable gift annuity that Professor Steinfeld made with assistance from the MIT Office of Gift Planning and will be further supported through a bequest. Another story introduced Benita Cooper SM '85 whose late husband Robert Cooper ScD '63 was an MIT professor before becoming an influential US government official, including serving as director of the Defense Advanced Research Projects Agency. To honor his memory, Cooper has continued to support MIT by founding the Robert S. (1963) and Benita A. (1985) Cooper Scholarship Fund, which was created with a preference for Native American students. Her most significant gift is one of real estate: the home that she and her husband renovated and shared. Finally, brothers Jen King Jao '71, SM '71, PhD '75 and Zen-Kay Jao SM '71 found themselves faced with the question of whether to sell their father's house. They ultimately decided to turn it into a gift of real estate through a charitable remainder trust at MIT. The Jao's consider the gift an expression of their gratitude for the superb learning experience they received at MIT. Due to the pandemic, the decision was made to hold the spring issue of [Corridor](#) and repurpose the content for fall 2020.

The Katharine Dexter McCormick (1904) Society (KDMS) honors individuals who have chosen to support the Institute's mission through bequests, life income funds, and other planned gift arrangements. During FY2020, KDMS organized two events for its members. The annual Appreciation Brunch on Sunday, September 29, 2019 presented celebrated speaker Institute Professor Sallie "Penny" Chisholm delivering a lecture titled "Tiny Cell, Global Impact: What Phytoplankton Have Taught Me About Life," in which she described her discovery of the smallest and most abundant phytoplankton in the sea, *Prochlorococcus*, and shared some of the many lessons it has taught her and her students over the years.

During the winter, KDMS collaborated with the Alumni Association's Cardinal and Gray (alumni who have reached the 50th anniversary of their graduation); the Emma Rogers Society (widows and widowers of MIT alumni); and the William Barton Rogers Society (leadership-level annual giving), to organize a winter lecture and luncheon series on January 14, 2020 in Los Angeles and January 16, 2020 in Palo Alto, CA. KDMS co-chairs Heather Cogdell '89 and L. Robert Johnson '63 joined with Cardinal and Gray chair Rick Lufkin '68 to introduce featured speaker Andrew Babbin, Doherty Assistant Professor in Ocean Utilization in the Department of Earth, Atmospheric and Planetary Sciences, who delivered a talk entitled "A Sea of Change: Natural Dynamics in the Global Oceans."

OGP giving activity was exceptionally strong for FY2020, see below:

- Life income gifts: \$26,449,878
- DAF contributions: \$10,030,841
- Outright gifts: \$2,440,266
- Outright pledges: \$90,000
- Planned gift pledges: \$639,481
- Realized bequests: \$9,838,498
- Credited bequests: \$32,463,971
- Number of credited bequests: 13
- Number of new Katharine Dexter McCormick (1904) Society members: 89
- Memorial gifts: \$4,601,535

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, and engages foundations to maximize support to the Institute. 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.

On an ongoing basis, OFR works with the Office of Philanthropic Partnerships on dually managed relationships (individuals and their philanthropic organizations); with colleagues across Resource Development; with the Offices of the President and the Vice President for Research; with other senior leaders, as well as deans, faculty, and development and program staff in the College and the five schools. 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.

Key activities for OFR staff include arranging visits to campus for foundation representatives; coordinating and staffing meetings between senior officers and foundation leaders and program staff; engaging faculty and staff to develop strategies, proposals, meetings, and follow-up; 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 FY2020, OFR staff played a leading role in strategies for soliciting foundations, partnering with senior officers and faculty on in-person and virtual visits. The team engaged new foundations with MIT and grew additional connections and opportunities with current relationships. Business development is organized according to the themes of computing; open learning, education, and digital learning; climate, sustainability, energy, and the environment; and life sciences. Key activities related to discovery science and technology were also implemented through new projects and programs. Staff work with campus partners grew through regular meetings, prospect review, and coordination.

OFR's FY2020 key results, achieved in partnership with colleagues, faculty, staff, and senior leadership, included the following:

- 936 new gifts and pledges (28 gifts of \$1 million or more), totaling \$114 million
- Three presidential foundation visits with OFR involvement
- 24 senior officer/dean foundation visits with OFR involvement
- 130 additional foundation visits and significant interactions

During FY2021, OFR will be focused on key high-level activities related to closure of the Campaign for a Better World, reviewing MIT leadership stewardship for foundation relationships and gifts, and will continue to prioritize efficiencies in planning and in operations.

Alicia Carina Sanchez
Executive Director, Foundation Relations

Campaign Office

The Campaign Office leads the planning, development, and implementation of MIT fundraising campaigns. The office monitors and helps drive activity on pipelines; partners with fundraising units and the Alumni Association to develop strategies to increase solicitations for unmet needs; promotes awareness of and supports asks for capital, unrestricted funds, scholarships, fellowships, and Institute priorities; facilitates senior leadership efforts in support of the Campaign and ensures leadership priorities are clearly communicated to Resource Development audiences; ensures volunteers are actively engaged in cultivation, solicitation, and stewardship activities; and develops strong partnerships with schools and departments, labs, and centers to develop Campaign-scaled stewardship activities.

The office is composed of four teams: Volunteer Engagement, which manages and supports the activities of the Institute's highest level of fundraising volunteerism (the Corporation Development Committee and the Campaign Leadership Council); Campaign Strategy, which identifies strategies and opportunities for deployment of senior officers and other campaign leaders; Campaign Initiatives and Planning,

which works closely with the faculty leads for each campaign priority and directs thematic content, including managing the policies, procedures, and planning for capital fundraising; and Campaign Operations, which develops and implements reporting systems for the Campaign and provides data-driven analyses to guide decisions for MIT's strategic fundraising efforts and manages advancement education programming.

The Corporation Development Committee was actively engaged in donor outreach, identification, and engagement for the MIT Campaign for a Better World. The focus of the committee remains on individual prospect engagement. Many members maintain an active portfolio of leadership and principal gift prospects and conduct visits in partnership with development team members. In the last year, committee members personally hosted 13 cultivation events featuring prominent faculty, notable alumni, and MIT leadership.

Members convened on campus for the 2019 Corporation Development Committee Annual Meeting held in conjunction with the Alumni Association's Alumni Leadership Conference, on September 26–27. Chairman of the Corporation Robert B. Millard '73 presided over the two-day meeting, which included the following:

- A tour of MIT.nano led by Vladimir Bulović—director of MIT.nano, professor of engineering, MacVicar Fellow, and Fariborz Maseeh (1990) Chair in Emerging Technology
- A welcome dinner hosted by the chairman featured a discussion with Provost Martin A. Schmidt SM '83, PhD '88 and D. Fox Harrell—professor of digital media and artificial intelligence in the Comparative Media Studies Program and Computer Science and Artificial Intelligence Laboratory—who shared their vision and aspirations for the MIT Stephen A. Schwarzman College of Computing
- A faculty spotlight session featuring Ibrahim I. Cissé—Class of 1922 Assistant Professor of Physics; Joann de Zegher—Maurice F. Strong Career Development Professor and assistant professor, Operations Management at the MIT Sloan School of Management; and Desiree Plata PhD '09—Gilbert W. Winslow (1937) Career Development Professor in Civil and Environmental Engineering—who spoke about their research, journey to MIT, and the importance of fellowships
- A luncheon featuring Ian A. Waitz—vice chancellor for undergraduate and graduate education and Jerome C. Hunsaker Professor of Aeronautics and Astronautics—who spoke about the importance of scholarship and fellowship support
- Updates and insights on the Institute's endowment, finances, capital projects, and the higher-education landscape in Washington, DC, featuring Seth Alexander—president of the MIT Investment Management Company, David Goldston—director of the MIT Washington Office, and Israel Ruiz SM '01—executive vice president and treasurer
- A networking reception featuring Marty Culpepper SM '97, PhD '00—maker czar and professor of mechanical engineering—spoke about Project Manus, MIT's effort to upgrade campus makerspaces, and foster student maker communities
- An inaugural meeting of the committee associates—recent graduates who help MIT engage the next generation of leadership donors and volunteers

Following the annual meeting, 15 committee regional meetings and events were held around the globe, including in Boston (hosted by Lois J. MAR '71 and James A. Champy '63, SM '65); Houston, TX, Austin, TX, New York, Boca Raton, FL, and Hong Kong (hosted by David Wu '90); San Diego, CA (hosted by Robert L. Blumberg '64, SM '65 and Peter Farrell '67); Los Angeles (hosted by Haejin Baek '86); San Francisco (hosted by Sally Yu '00); Menlo Park, CA (hosted by Charlene Kabcenell '79); and London (hosted by Pappudu Sriram '96 and Yda Wiechers-Bouvier, MBA '98); featured speakers included the following:

- Suzy Nelson, vice president and dean for Student Life
- James J. Collins, Termeer Professor of Bioengineering in the Department of Biological Engineering and Institute for Medical Engineering and Science
- John Durant, Mark R. Epstein (Class of 1963) Director of the MIT Museum and adjunct professor in the Program in Science, Technology, and Society
- Cynthia Breazeal SM '93, ScD '00, associate professor, MIT Media Lab, Personal Robots Group, and associate director of Strategic Initiatives for the Bridge, MIT Quest for Intelligence
- Julie Shah '04, SM '06, PhD '11, associate professor, Department of Aeronautics and Astronautics and leader of the Interactive Robotics Group in Computer Science and Artificial Intelligence Laboratory

As COVID-19 spread across the globe in the spring, in-person committee regional meetings were replaced with virtual meetings in May and June for the mid-Atlantic, Hong Kong, and London regions, and a webinar for both committee members and Campaign Leadership Council members on June 11, 2020 featured W. Eric L. Grimson PhD '80—chancellor for Academic Advancement and Bernard M. Gordon Professor of Medical Engineering.

Members of the Corporation Development Committee continue to show leadership in their personal philanthropy and in their outreach as MIT's fundraising ambassadors, sharing the extraordinary progress being made by the Institute's faculty and students with our alumni and friends around the world.

President Reif and Vice President Julie Lucas welcomed the Campaign Leadership Council to its fall meeting on December 6, 2019 featuring the presentation entitled, "Rising Stars and Future Leaders: The Impact of Investing in Fellowships and Junior Faculty." Anette "Peko" Hosoi, associate dean, School of Engineering and Neil and Jane Pappalardo Professor of Mechanical Engineering, moderated a robust discussion with two former MIT graduate students who were fellowship recipients and are now teaching as MIT junior faculty: Professor Plata and Professor Asegun Henry '06, PhD '09 Noyce Career Development Professor of Career Development. Campaign Leadership Council members and co-chairs continue to be active and engaged volunteers, working in tandem with Institute leadership and staff both in their own regions and across collaborative networks.

The Campaign Strategy team shares information and identifies strategies and opportunities for deployment of the senior officers and other campaign leaders. Among their activities, staff recorded 90 confirmed appointments for Rafael and Christine Reif prior to COVID-19; 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.

At the May 2020 Corporation meeting, Chairman Millard announced his intention to retire. A report summarizing his impact on Resource Development was created that includes the following metrics (FY2015–FY2020).

Resource Development Chairman Visits

- Chairman Millard conducted 357 individual visits with donors, alumni, and friends (approximately nine every month throughout the academic year).
- The cohort group who had a personal visit with the chairman has given a lifetime total of \$2.1 billion to MIT and \$1.6 billion to the Campaign for a Better World (27% of the total goal).
- Approximately 64 donors who have spent time with Chairman Millard during his chairmanship have given MIT over \$1 million following their time together.

Chairman Events FY2015–FY2020

Chairman Millard attended 167 events with a development component (37 annually, roughly one a week during the academic year). Of those events, 75 were where Chairman Millard's presence was integral to the gathering (either as a host or speaker); Millard spent time with 1,225 donors, alumni, and friends during these events; and the cohort group of those who have attended an event with the chairman have given a lifetime total of \$3.3 billion to MIT and \$2.5 billion to the Campaign (41% of the total goal).

The Strategic Initiatives and Planning team collaborated with fundraising units and school and College partners to raise \$26 million for capital projects, including a lead gift for the Earth and Environment Pavilion (Building 54 addition) and key gifts to support the Music Building and Metropolitan Warehouse (Building W41) projects. The team continued to work with the Chancellor's Office senior leadership to manage its fundraising priorities and coordinate efforts as they relate to several campaign priorities.

Campaign Operations consistently tracked Campaign performance through various reports and modeled projections for closing FY2020 and reaching the \$6 billion Campaign goal. Along with numerous ad hoc data analyses and donor lists, Campaign Operations shared benchmarking and industry information, contributed to senior team presentations and completed special projects on the Institute's earliest donors and with the School of Engineering. Training initiatives throughout the year provided opportunities for fundraisers to build skills, share best practices, and increase knowledge of the MIT fundraising landscape. Topics included an overview of experiential learning opportunities at MIT, capital projects, updates on the Innovation

and Entrepreneurship hub in Kendall Square and the new Music Building, Admissions and Financial Aid, Residential Life, and the priorities of the College and schools.

David A. Woodruff

Associate Vice President and Chief Operating Officer

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. 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.

During FY2020, the Communications and Events team reached 23 regional markets in the Campaign for a Better World with events in Atlanta, GA; Westchester County; and London. In Atlanta on October 18, 2019 Melissa Nobles—Kenan Sahin Dean of the School of Humanities, Arts, and Social Sciences—was the lead speaker for an evening focused on the social implications of AI, examining pioneering new insights into the responsible and ethical development of advances in computing and artificial intelligence. Resource Development brought MIT to London for a second visit on November 8, 2019 for an evening focused on the topic of investing in a sustainable planet, with TED-style talks and an audience Q&A led by Maria Zuber, vice president for research and E. A. Griswold Professor of Geophysics. The Campaign for a Better World traveled to the Westchester area on February 27, 2020 to showcase the Institute's influence on the current and future shape of innovation and entrepreneurship with David C. Schmittlein, dean of the Sloan School of Management, heading up the discussion of MIT as an incubator of the essential traits that push inventors, innovators, and entrepreneurs to make a difference in the world. The Toronto Campaign event scheduled for April 29, 2020 on the theme Science Matters was necessarily postponed due to the spread of COVID-19.

Altogether, the team planned 96 high-level engagement, cultivation, and stewardship events, key among them the Corporation Development Committee (CDC) annual meeting and 11 domestic and international CDC regional meetings, including three virtualized gatherings; three Corporation Partners Programs; MIT's reception at the World Economic Forum in Davos, Switzerland; the Katharine Dexter McCormick (1904) Society's annual appreciation brunch; Orientation and Family Weekend events for parents of incoming first-year students as well as a virtual Parents Leadership Council board dinner; two Women in Science and Technology luncheons; the annual Bose Fellows reception and a virtualized Jacobs Presidential Fellows luncheon; three events in the Paul E. Gray Technology Breakfast Series; five signing ceremonies; two webinars and two virtual roundtables with highly rated donors and MIT faculty; and over a dozen receptions and dinners hosted by high-level donors at their homes or local venues.

Resource Development produced three issues of *Spectrum* magazine, both digital and in print, during FY2020. The summer 2019 edition explored how the winding paths of discovery propel groundbreaking research and further personal development. A special section on the theme of trajectory included stories about genetic testing for life on Mars, connecting urban planning to the future of work, and the history of mass-produced food, as well as a video of a backflipping MIT mini-cheetah that, due to its suitability for use in any terrain, could one day help save lives. The fall issue took a deep dive into MIT's maker culture, from an architecture class that challenges students to explore the unintended consequences of making to the use of virtual reality to train drones by simulating environments that unpersonned vehicles might encounter in the real world to the help that the Martin Trust Center for Entrepreneurship provides in launching successful startup companies. Spring 2020's computing issue covered the MIT Stephen A. Schwarzman College of Computing, which, by bridging disciplinary boundaries, draws great minds together to consider the societal and ethical challenges that lie ahead and the extraordinary global opportunities offered by advanced computing and artificial intelligence.

Resource Development produced two major communications pieces in December conveying the maker culture at MIT. A video titled *Minds and Hands at Work: Making at MIT* looks at some of MIT's makerspaces, where students get access to the tools they need to build on MIT's long history of inventiveness. The film also displays how the forthcoming Metropolitan Warehouse makerspace will forge a new maker community at MIT. A series of briefer Meet the Makers videos highlight MIT students, faculty, alumni, and staff who are putting a spirit of inventiveness and discovery to work creating maps, machines, music, and more.

To convey the need for critical scholarship funding, Resource Development produced a series of stories and scholarship videos about the 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. Production of these stories will continue into FY2021. In addition, the Resource Development resource library includes a customizable scholarship proposal template, several one-pagers on establishing endowed scholarships at MIT, and a financial aid FAQ for relationship managers.

The Resource Development Communications team collaborated with the Campaign Office to create a virtual tour that brings the Kendall Square capital projects to life. The tour is designed for use in donor meetings, at events, and by visitors to the Campaign website. Talking points about the tour's content were also made available on the advancement intranet.

Resource Development continuously adds fresh materials to its communications library to keep fundraisers, volunteers, donors and prospects up-to-date on MIT's Campaign priorities. A special suite of materials about the MIT Stephen A. Schwarzman College of Computing includes a fundraising viewbook and a customizable PowerPoint presentation featuring content from the viewbook to suit individual fundraisers' needs. Other resources to support MIT's advancement staff include a playlist of videos to recap the programming from the MIT Better World regional events; updated sets of

talking points for the Vassar Street and Kendall Graduate residences containing new information about construction milestones; a one-pager on the Music Building capital project, providing details on the impact of the new facility for the Music Section and its approved naming opportunities; a description of the New Engineering Education Transformation that is reimagining an MIT undergraduate education to reflect the realities of the present and anticipate the needs of the future; the Women's Technology Program, which cultivates the interests of bright young women in engineering and gives them the opportunity to discover a community of mentors and role models; and a one-pager on the Coronavirus Aid, Relief, and Economic Security Act highlighting several provisions of particular interest to individuals and corporations considering charitable donations in FY2020.

Resource Development launched MIT Responds, a periodic e-newsletter 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 leading more than 50 COVID-19 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 COVID-19, concluding with ways to learn more and support MIT's efforts. The inaugural issue on April 15, 2020 featured an introductory message from President Reif. Additional issues were published on April 28, May 21, and June 23. The e-newsletter will continue publication in FY2021.

Overall, the team completed 775 marketing communications and design projects to support the Institute's highest fundraising priorities, wrote or edited 33 proposals and concept notes, developed event marketing and production materials, and increased web traffic 17% as a result of email campaigns and 60% from social media, doubling Facebook reach and increasing Twitter impressions by 75%.

In the coming fiscal year, in addition to continuing its focus on communications and events support for core Institute priorities, the Communications and Events teams will:

- Develop a fundraising communications suite for fellowships
- Explore robust platforms for increased virtual engagement and events
- Present three virtual roadshows in partnership with the MIT Alumni Association
- Support Fundraising Fundamentals educational outreach efforts for MIT faculty through a partnership between Resource Development and the Office of the Provost

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, Events, 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, 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 president and vice president for Resource Development acknowledge charitable gifts from individuals to the Institute, with special attention this year to faculty and staff donors to the COVID-19 related funds. The team oversees an internal review process created to ensure all correspondence prepared by RD on behalf of the MIT president is grammatically correct, reflects accurate and comprehensive content, and captures appropriate presidential tone. During FY2020 the number of presidential gift acknowledgements increased from 731 to 764, or 5% over the prior year. Even with the increased volume, the average turnaround time for these letters from receipt of the gift to mailing of the acknowledgement remained at just under six days. The team also drafted 507 letters from Resource Development Vice President Julie Lucas, an increase of 8% over FY2019. Additionally, the DRS team conveyed more than 1,082 RD-oriented presidential communications via the PresDrafts process.

The Charter Society, a permanent recognition society, honors donors who have made gifts to the Institute totaling \$1 million or greater. This year, 51 new individual donors were added to the MIT Charter Society. 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 FY2020, Resource Development welcomed 144 new individuals to the 77 Society with the distribution of vice-presidential welcome letters and the eventual 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. In order to support meaningful engagement with our global community during the time of physical distancing due to the pandemic, DRS developed options to support the virtual presentation of both MIT Charter Society limestones and the 77 Society medallions to donors; presentations will begin in FY2021 and relationship managers will be further supported by some enhanced talking points related to the medallions and the Campaign for a Better World.

The Donor Relations and Stewardship team actively stewards more than 660 endowed and expendable scholarship funds, and for the first time this year, partnered with Student Financial Services to help to match these funds to 956 students. During December, the team distributed 802 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 FY2019 endowment performance; a one-pager on MIT's Class of 2023 and an overview of students and financial aid; and cover letters from Executive Vice President Israel Ruiz SM '01 and Vice Chancellor for Undergraduate and Graduate Education Ian Waitz. Many relationship managers took the opportunity to personalize and hand deliver the packages to their donors.

This year, scholarship donors were invited to provide updated information about themselves, their motivation for establishing a scholarship fund, and information about the person for whom a fund may be named. This is a meaningful opportunity for donors to tell their stories, which are shared with students when they learn about their financial aid packages. Scholarship Donor Statement pages were reviewed and updated, including research to update approximately 100 historical statements from donors who are unavailable, to enable students to read about and feel connected to the donors who established their scholarship funds as far back as the 19th century.

In March, the Donor Relations and Stewardship team distributed 532 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 took the opportunity to personalize the letters of appreciation. Of the 658 scholarship beneficiaries, 81% 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, the Donor Relations and Stewardship team produced eight Office of Graduate Education (OGE) fellowship reports, five Provost Fellowship reports, and 24 Presidential Fellowship reports. OGE fellowship stewardees received a cover letter from Vice Chancellor Waitz, thank-you letters and CVs from their fellows, and a financial report. Delivery of scholarship bios and OGE fellowship reports were combined for individuals who are both fellowship and scholarship stewardees. Provost fellowship stewardees received a cover letter from Provost Marty Schmidt and thank-you letters and CVs from their fellows. Presidential Fellowship stewardees received a cover letter from Vice Chancellor Waitz and thank-you letters from their fellows. The team also produced 10 new chair professorship reports and, new this year, 16 chair update reports. The new chair reports included a cover letter from Provost Schmidt and an introductory letter from the professor. The update reports included a cover letter from the professor's department head and a letter from the professor including updates on their work from the past few years. DRS also helped to assure that Division of Student Life funds donors received updates from program leaders through producing reports for 135 donors to 24 athletic funds. These reports included a letter from Julie Soriero, the Department of Athletics, Physical Education and Recreation head, it included updates on the programs supported, and student testimonials on their experiences with those programs.

The DRS team continued to support the growth of the individualized stewardship plans program in partnership with the Office of Leadership Giving and Office of Philanthropic Partnerships, meeting one-on-one with relationship managers to discuss their portfolios and the opportunity for thoughtful stewardship touches to support the strategic cultivation of donors. The program was expanded this year to include the Office of Gift Planning. Intended to ensure that previous gifts are appropriately recognized and stewarded, as well as to provide opportunities for cultivation of continuing support, stewardship plans include deeply personal and personalized touchpoints and key engagement opportunities for MIT's most generous donors.

The 2020 MIT Scholarship and UROP Brunch, which brings together the Institute’s most generous supporters of scholarships and the Undergraduate Research Opportunities Program (UROP) with scores of students who benefit from their support, was necessarily cancelled due to the COVID-19 pandemic. In its absence, DRS partnered with Communications colleagues to develop a special email communication to thank and celebrate scholarship, UROP, and unrestricted donors and provide them with a sense of connectedness and engagement. The communication included a message from Chancellor Cynthia Barnhart, thanking recipients for their support and featuring three home-recorded thank-you videos from students. The videos were hosted on the Campaign for a Better World website, and the landing page included links to additional scholarship stories that the Resource Development Communications team produced over the past year.

In December, President Reif presented a special milestone gift to Marilyn Simons and James Simons ’58. upon the occasion of their extraordinary lifetime generosity to MIT passing the \$200 million mark. The gift incorporates an oculus tile recovered from the MIT Dome renovation project and installed in a sculpture created by the artisans in the MIT Forge and Foundry. It was accompanied by a customized book conveying the impact of the Simons’s generosity. In March, President Reif presented Lore Harp McGovern—widow of Patrick J. McGovern ’59—an oculus package, including a customized book commemorating the McGovern’s incredible philanthropic contributions to our community, from neuroscience to the arts, and the founding of the McGovern Institute for Brain Science.

Jen McGrath
Senior Director, Donor Relations and Stewardship

Strategic Information Management

The Strategic Information Management (SIM) unit provides business intelligence, modeling, and information delivery and related processes, as well as optimizes prospect portfolios and enhances research partnerships with fundraisers to help to build engagement and solicitation strategies. SIM provides critical processes and technological infrastructure to enable fundraising operations, communications, and donor relations. SIM also provides programming and equipment support to the Office of the Recording Secretary and partnered closely with this office to build out a comprehensive philanthropic due diligence function. As a shared steward of MIT’s fundraising institutional memory, SIM partners with the Alumni Association (AA) on data governance and ensures data integrity.

In order to engage program managers and senior leaders in critical decision making regarding the long-term roadmap for information management, SIM convened 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, schools and College, and departments, labs, and centers, as appropriate. To achieve alignment and integration with campus administrative systems, SIM also collaborated with the Offices of the President, Provost and Chancellor, General Counsel, Strategic Alliances and Technology Transfer, the Corporation Office, and the Research Administration Services.

The SPC is guided by the following priorities:

- People first
- Support off-site staff with equipment and technology
- Improve processes for enhanced efficiency
- Optimize prospect pipeline and portfolios
- Enhance prospect due diligence
- Promote technology innovation
- Focus on data integrity, privacy, governance, and security
- Enhance training and documentation
- Minimize technical debt

The fundraising technology landscape has evolved significantly in recent years and, in particular, MIT's enterprise alumni and donor information system, Advance, is more than 25 years old and soon will no longer be supported by its original developer, Ellucian. Transitioning from one fundraising platform to another requires substantive financial and human resource investment. During FY2020, RD's Advancement Technology Roadmap Committee, which includes technical representatives from AA, RD, the Sloan School of Management, the Recording Secretary's Office, and Information Services and Technology, engaged Huron Consulting Group to assess the technology landscape and develop a business case that analyzes the opportunities, risks, and costs of retiring the current legacy system and pursuing a modern platform solution.

A key accomplishment during FY2020 was the release of the new Fundraiser Portfolio Tool, 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 product was designed to support all fundraisers at MIT, not only in Resource Development but also in the AA's Annual Fund, schools and College, and departments, labs, and centers. The tool will be enhanced in the coming year with additional management components.

Due diligence research on prospective donors or other sources of philanthropic giving has dramatically increased in the advancement community worldwide. In the process of performing due diligence, reputational or legal issues are identified that could arise during gift conversations, gift acceptance, or fulfillment of ongoing pledge payments. RD has implemented several levels of due diligence research on Presidential Level gifts as well as news checks for Visiting Committee nominations. The levels of research range from initial screening and reporting to enhanced due diligence dossiers with specific sources of wealth information, sanctions and political exposure, negative news searches, and both direct and indirect legal and compliance risk. Such research and reporting are expected to increase in coming years as the gift acceptance process begins to include amounts lower than \$1 million.

As a result of a comprehensive vendor investigation conducted by the Information Systems team in collaboration with the Events team, SIM selected a new events tool to be used across Resource Development to replace existing, disparate tools on multiple platforms. The new tool, Cvent, will be used to support all events from invitation and online registration through close of event, and, most importantly, will include comprehensive integration with the enterprise Advance alumni and donor information system. Because Cvent is also in use at the Sloan School of Management, RD's implementation will be expanded to include Sloan, thereby achieving further integration with one of our largest campus partners.

Data entry of contact reports (narrative descriptions of interactions between MIT staff and donors or prospects) into the Advance database was completely automated in FY2020. Whereas reports were previously sent to the data entry staff to retype into the system, the process was streamlined to allow direct data entry by fundraisers and their support staff.

With the onset of COVID-19 and the resulting closure of the campus, the Information Systems group worked to ensure a smooth transition to remote work for all Resource Development staff. The team established self-guided training as well as virtual classes with live demonstrations for a set of communication tools (Zoom, Slack, and Jabber), collaboration tools (Fileservers and Dropbox), security (secure home workspace guidelines, VPN, and Duo), and an application to provide staff with remote support.

During FY2020, SIM staff:

- Updated 28,173 data fields in Advance and over 15,000 Development Office files
- Identified 825 new major gift prospects, completed 977 new prospect assignments, and updated 1,609 prospect assignments
- Conducted 75 portfolio consultations with fundraisers across campus
- Completed 641 trip and visit briefings
- Conducted wealth screenings on 71,615 prospects
- Completed 106 project-related prospect research requests
- Completed 154 enhanced due diligence checks and 889 negative news checks
- Completed 4,785 IT Service Desk requests
- Completed 4,598 project-related requests (e.g., event and mailing lists, funding reports, large programming projects related to enhanced processes, and new prospecting and reporting tools)

Deborah M. Cunningham
Executive Director, Strategic Information Management

Human Resources and Strategic Talent Management

The Office of Human Resources and Strategic Talent Management (HR/STM) assists Resource Development 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 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.

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 workshops titled Conducting Effective Career Discussions for Managers; Preparing for Career Conversations; and a leadership training pilot for 25 participants to strengthen their leadership skills.

To help align daily work in support of MIT's mission, HR/STM rolled out a clarified mission, vision, and value statements for the staff of RD. These statements underpin a new set of four core competencies called CAPS (Collaborative, Accountable, Proactive, and Strategic), which provide a framework to guide managers and direct reports in their conversations around goal setting, performance, and career growth. HR/STM also engaged an instructional design firm to develop a set of e-learning modules around the four core competencies to ensure that employees are clear regarding what is expected of them.

During FY2020, HR/STM worked with three of the frontline teams in RD to design and implement flexible-work pilot programs within their organizations. The activity identified ways to leverage flexibility as a tool to drive efficiency, engagement, productivity, and work-life integration without negatively impacting support to faculty, donors and prospects, alumni, administrators, and other collaborative relationships.

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 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.

The HR/STM team offered the LGBTQ+ Diversity Dialogues Presentation and initiated planning for unconscious bias workshops to be held next year. The team hired and conducted onboarding presentations for 37 staff, managed 23 promotions and transitions to other positions within Resource Development, and offboarded 27 staff to positions either internal or external to MIT.

During FY2021, HR/STM will seek to foster and strengthen staff excellence; produce and implement a strategic talent management roadmap for acquiring, engaging, assessing, developing, and retaining staff; elevate a culture that encourages diversity, equity, and inclusion; and not only communicate an RD mission, vision, values, and core competencies, but also live by them in our day-to-day work.

Ellen Gilmore

Executive Director, Human Resources and Strategic Talent Management

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.

During FY2020, senior members of 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 FY2020 strategic planning and budget allocation process. In addition, they collaborated closely with the Human Resources and Strategic Talent Management team to track and allocate open positions and off-cycle promotions and merit increases. The team also provided key support to the CEO of AA in communicating and implementing the strategic objectives of the MIT Alumni Association board of directors.

FO worked with staff from the Office of the Vice President for Finance 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's advancement benchmarking initiative; oversaw all contracting and financial management of the FY2020 Campaign roadshows as well as refunds and contract extensions due to the COVID-19 event cancellations; 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 2019 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.

FO engaged the MIT Environmental Health and Safety Office to conduct a thorough survey of Building W98, including an indoor air-quality survey. The results of the inspections and testing showed the overall building condition as good and that air quality meets the assessment criteria. In addition, as part of a campus-wide initiative, a lighting efficiency upgrade was conducted to improve the efficiency and quality of the lighting systems in Building W98. The new system was designed to take advantage of outdoor ambient light and dim or increase the amount of illumination needed in any one area, thereby saving energy and reducing maintenance costs.

With the closure of campus due to the COVID-19 pandemic, the executive director of Finance and Operations was asked to join the MIT Business Continuity Team. In Building W98, operations staff continued critical, on-site building management in support both RD and AA with special attention to ensuring continuity of gift operations. In collaboration with the AA and RD Tech Support teams, FO facilitated the distribution of computer equipment for staff who are now working from home.

Prior to the pandemic, work began with the senior teams in both RD and AA to optimize space allocations by unit, address tension points, and consider telecommuting in the space plan. As the campus reopens for administrative units and occupancy of Building W98 is allowed, we will leverage this planning to create better adjacencies and enable continuing remote work where feasible and desirable.

During FY2021, FO will implement a strategic approach to budgeting through the end of the Campaign, into the next phase of fundraising, and in conjunction with the implementation of the Technology Roadmap, following these guiding principles:

- Require financial accountability from the organizational units
- Focus on efficiency
- Clarify roles and responsibilities, ensure no duplication of efforts
- Divest from work not producing return on investment, using metrics to measure
- Align work and resource allocation with RD priorities
- Collaborate across teams and enhance cross-training for staff
- Incorporate CAPS into goals, coaching, and performance reviews

William J. Fitzgerald
Executive Director, Finance and Operations