

Reunion

GIFT

Planned Giving Chair Role Description

With guidance from Annual Giving staff and the Office of Gift Planning, the Planned Giving Chair serves on the Reunion Gift Committee and promotes ways for classmates to support the Class Reunion Gift Campaign with documented bequests and/or contributions to Life Income Funds (e.g. CRUTs, CGAs, DCGAs), shares information about the [Katharine Dexter McCormick \(1904\) Society](#) (the Society for those who have made provisions for gifts to come to MIT after their lifetimes), and acts as an inspiration and resource for classmates with questions and inquiries about planned gifts during a reunion year.

Primary Responsibilities

1. Make a personal gift to the Reunion Gift Campaign by fiscal year-end (6/30)
2. Attend the Alumni Leadership Conference and appropriate MIT Volunteer Training Academy sessions as your schedule permits
3. Participate in virtual committee meetings and trainings, including any planned gift trainings for Reunion Gift Committee volunteers as your schedule permits
4. Serve as signatory for Planned Giving communications to the class in conjunction with the Office of Gift Planning
5. Select, solicit, and encourage pledges from 10 or more classmates through MIT's Outreach Management Tool (OMT)
6. Focus outreach around key MIT giving dates, including Giving Tuesday (late Nov./early Dec.), the MIT 24-Hour Challenge (mid-March) and Reunion lead-up (May-June)
7. Participate in Outreach Hours as your schedule permits
8. Collaborate with Annual Giving staff and committee Co-chairs to share planned giving updates
9. Send personal acknowledgments when made aware of classmates who make planned gifts
10. Respect the confidentiality of personal information provided by Annual Giving staff

Time Commitment

Term is approximately 1 year, through the end of MIT's Fiscal Year (6/30). Ability to meet monthly time commitment of 1-3 hours per month.

Training and Support

Alumni Leadership Conference (ALC), Volunteer Training Academy training sessions, committee kickoff call training, MIT Volunteer Knowledge Base, 1:1 training with Annual Giving staff and Gift Planning staff as may be helpful.

Benefits

Increased access to MIT news and events. This position also builds your leadership portfolio for additional roles within the Alumni Association, and provides fundraising experience for non-profit organizations, board positions, and the Office of Gift Planning Advisory Council.

Qualifications

1. Comfort with responding to planned giving questions
2. Demonstrated generosity to MIT through a bequest and/or a Life Income Fund gift to the Institute

Annual Giving programs are aligned with the MIT Alumni Association's [Strategic Plan and culture](#), along with the [MITAA Volunteer Expectations and Responsibilities](#). We encourage each volunteer to support MIT's goal of making a welcoming place where people from a diverse range of backgrounds can grow, innovate and thrive. Each volunteer serves as an extension of the Institute, creating a lasting legacy of service to the nation and the world. The MIT Alumni Association reserves the right to disengage with any volunteer who does not adhere to these guidelines or whose actions are inappropriate in relation to the goals of MIT or the Association.