Bicentennial Campaign Planning
*Milestones and Next Steps*

Marc Weinstein
Vice-Principal,
University Advancement

November, 2017
Campaign Timeline

Overview

- Counting began on May 1, 2013, when Campaign McGill: History in the Making concluded (the “quiet phase”)
- The active planning period involves a push to lay groundwork for the launch (secure campaign budget, form advisories, hire key personnel, etc.)
- Public phase is to begin in 2019, with exact public launch date still to be determined.
- Campaign will last ~10 years, through 2024.
The feasibility study includes:

- A **case for support** which states McGill’s aspirations and campaign objectives
- An **online donor survey** to collect information, such as perceptions about McGill’s image and quality
- **Leadership briefings** held with key volunteers/potential donors to discuss the upcoming campaign and the case for support
- **Interviews** to test viability, scope, and overall direction of the proposed campaign

<table>
<thead>
<tr>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>June</th>
<th>July</th>
<th>Aug</th>
<th>Sept</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2017</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Case for support</td>
<td>Online donor survey</td>
<td>Leadership briefings begin</td>
<td>Individual interviews begin</td>
<td>Feasibility study results presented</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2017

2018
The Case for Support

The case for support will be organized around five key themes:

- Attract and nurture brilliance in all its diversity
- Bring the world to our campuses, and our campuses to the world
- Drive novel solutions to global challenges
- Inspire and embody innovation and entrepreneurship
- Build a campus befitting our ambitions

UA will also work with each Faculty to prepare Faculty-specific Cases for Support and tables of needs
The Case for Support

The result:

- A compelling, inspiring document that clearly articulates how giving will have a transformative impact on our Faculties, on McGill and on the world

- A seamless narrative that moves from vision, to priorities, to donor-funded opportunities

- A tool you can use to communicate your Faculty’s vision and needs as we prepare for the Bicentennial Campaign

- The foundation for department, school or project-specific cases, individual proposals, and ultimately the Campaign’s marketing materials (brochures, videos, etc.)
McGill has recently focused on two Grand Challenges to which the University will continue to commit:

- Healthy Brains for Healthy Lives
- McGill Sustainability Systems Initiative

To these important initiatives, we are undertaking an environmental scan of activities (research, teaching programs, community projects) across campus to establish areas of strength in:

- Infection and Immunity
- Food and Water Security
- Building Inclusive Societies
- Indigenous Success
Next steps

- Based on all of this information, our Campaign consultants will provide us with the results of the feasibility study in spring 2018

- Expected outcomes:
  - Validation of whether our campaign objective is realistic
  - Analysis of which elements of the Case hold the most interest and potential
  - Identification of any points of concern in the philanthropic community
  - A green light and roadmap to complete campaign planning
Why Good Stewardship Matters

...and how will a good strategy ensure Campaign success

Joanne Leebosh
Director, Donor Relations
University Advancement

November, 2017
Philanthropy provides the margin of excellence that operating funds alone can’t supply.
Why stewardship matters

The success of the Bicentennial Campaign will ride in large part on our ability to persuade our current Major Gift donors to give again.
Why stewardship matters

- Donors are more business savvy than ever before; they feel invested in their giving and want to see the impact of their donations.

- A shift from endowed giving to more expendable, direct-spend funding means results need to be even more immediate.

- Major donors are no longer “monogamous”; good stewardship maintains their support to McGill, just as poor stewardship may drive them into the arms of competing causes.
Why stewardship matters

- McGill benefits from an exceptionally loyal and committed donor base
  - Nearly 75% of our top donors report a high level of loyalty to McGill (ranked as an ‘8’ or higher on a scale of 1 to 10)
  - Loyalty increases with levels of giving
  - Half of our donors rank McGill as either their highest or second-highest charitable priority
Why stewardship matters

- However, we are facing some challenges:
  - 56% of our donors say they *also* support at least 10 other organizations
  - At the highest levels... 91% of our $100K+ donors support at least *six* other charitable organizations
  - FYI: our biggest competitors are healthcare, faith-based causes and arts & culture organizations
The role of University Advancement focuses on supporting the Faculty-based UA teams in their stewardship tasks:

- Creating customized stewardship reports for top donors (usually $1-million+)
- Publishing and distributing annual impact reports
- Staging major donor recognition events
- Monitoring compliance issues
As part of our Campaign preparations:

- Ensuring that each Faculty is staffed with appropriate, and appropriately-trained, Stewardship Associates
- Developing minimum stewardship guidelines for all top donors ($25K+up) to ensure baseline reporting and stewardship/friendship touch points
- Developing better protocols to thank all Leadership Level donors ($1,000+) within a week of their gift
- Establishing Stewardship KPIs for each Faculty to track and score percentage of tasks completed, and point to areas needing improvement
Campaign preparations (cont’d):

- Developing a robust stewardship plan for our James McGill Circle donors to ensure a best-in-class, concierge-type level of service for our most important benefactors

- Establishing a McGill Stewardship Consortium – a new forum to bring together all UA staff with stewardship responsibilities
Some key initiatives to monitor compliance:

- Review of endowed Chairs’ gift agreements to confirm the acceptable uses of income and stewardship/legal obligations
- Simplified report to help Faculties identify endowments where a significant amount of income remains unspent
- New *Guidelines for Planning and Establishing Chairs*, to be applied as of this Fall
- New process whereby UA will directly notify Chairs of any stewardship requirements linked to their gift

A shared responsibility
Some key initiatives to monitor compliance (cont’d):

- Info sessions with Development Officers, Deans and Faculty Financial Officers on importance of stewardship and proper use of endowments
- Comprehensive review of all VIP donors underway to identify and address any outstanding issues
- Under development: a new Gift Administrative Agreement (internal) for Primary Gifts
The role of academic leadership

- Ensure that funds are used... and put to use as intended
- Acknowledge support from donors, ie. say Thank You!
- Provide written reports on impact of gifts
- Create opportunities to bring together donors and recipients
- Engage donors in your work and in the life of your Faculty/School/Unit
Panel discussion

Our panelists:

Prof. Bruce Lennox, Dean, Faculty of Science
Prof. Carmen Loiselle, Ingram School of Nursing
Ram Panda, McGill benefactor and Chair, Board of Governors
Dr. Laurie Snider, Interim Director, School of Physical and Occupational Therapy
Marc Weinstein, Vice-Principal, University Advancement

Moderated by:

Derek Cassoff, Managing Director, Communications & Donor Relations