

# Memorandum

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**TO:** Board of Governors  
**FROM:** Mr. Marc Weinstein, Vice-Principal (University Advancement)  
**SUBJECT:** Annual Report from University Advancement  
**DATE:** December 1, 2016  
**DOCUMENT #:** GD16-23  
**ACTION REQUIRED:**  INFORMATION  APPROVAL/DECISION

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|  |   |
|--|---|
| <b>ISSUE &amp; EXPECTED OUTCOME</b>                      | The University Advancement Report provides an overview of philanthropic results and activities for fiscal year 2016. Two additional reports focus on the planning of the Bicentennial campaign.   |
| <b>BACKGROUND &amp; RATIONALE</b>                        | The enclosed presentation, “The Road to 200: Building on our strengths as we prepare for McGill’s Bicentennial,” provides an overview of some of the strategies and initiatives UA is undertaking to prepare for the Bicentennial Campaign. As background, two additional documents provide information on results achieved in FY16: the FY16 Alumni Relations and Annual Giving Annual Report and FY16 Financial Year in Review. |
| <b>ALIGNMENT WITH MISSION AND STRATEGIC PRIORITIES</b>   | McGill’s achievements and capacity to remain competitive across a full spectrum of scholarly activities are directly linked to the support it receives from philanthropic endeavours. As McGill approaches its Bicentennial, the University has a unique opportunity to galvanize global alumni and friends through an ambitious Campaign in support of its vision and priorities.  |
| <b>COMPLIANCE WITH UNIVERSITY POLICY</b>                 | Reports on philanthropy are routinely presented to the Board, its subcommittees and Senate. The Report has been presented to members of the senior administration, Senate, the Finance Committee and the Investment Committee.  |
| <b>COMPLIANCE WITH LEGISLATION/ EXTERNAL REGULATIONS</b> | There are no legislative requirements related to this item.   |
| <b>RISK FACTORS</b>                                      | Future fundraising challenges are outlined in the attached presentation.  |
| <b>SUSTAINABILITY CONSIDERATIONS</b>                     | McGill’s philanthropic efforts support the University’s identified priorities, including research and teaching encompassing many dimensions of sustainability. This focus will continue as planning progresses for the Bicentennial Campaign.   |

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**IMPACT OF  
DECISION AND  
NEXT STEPS**

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N/A

**MOTION OR  
RESOLUTION  
FOR APPROVAL**

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N/A

**APPENDICES**

Appendix A: Presentation: The Road to 200: Building on our strengths as we prepare for McGill's Bicentennial

Appendix B: FY16 Alumni Relations and Annual Giving Annual Report

Appendix C: FY16 Financial Year in Review

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## The Road to 200

*Building on our strengths as we prepare  
for McGill's Bicentennial*

**Marc Weinstein**

Vice-Principal, University Advancement

December 1, 2016

A unique opportunity to...



McGill

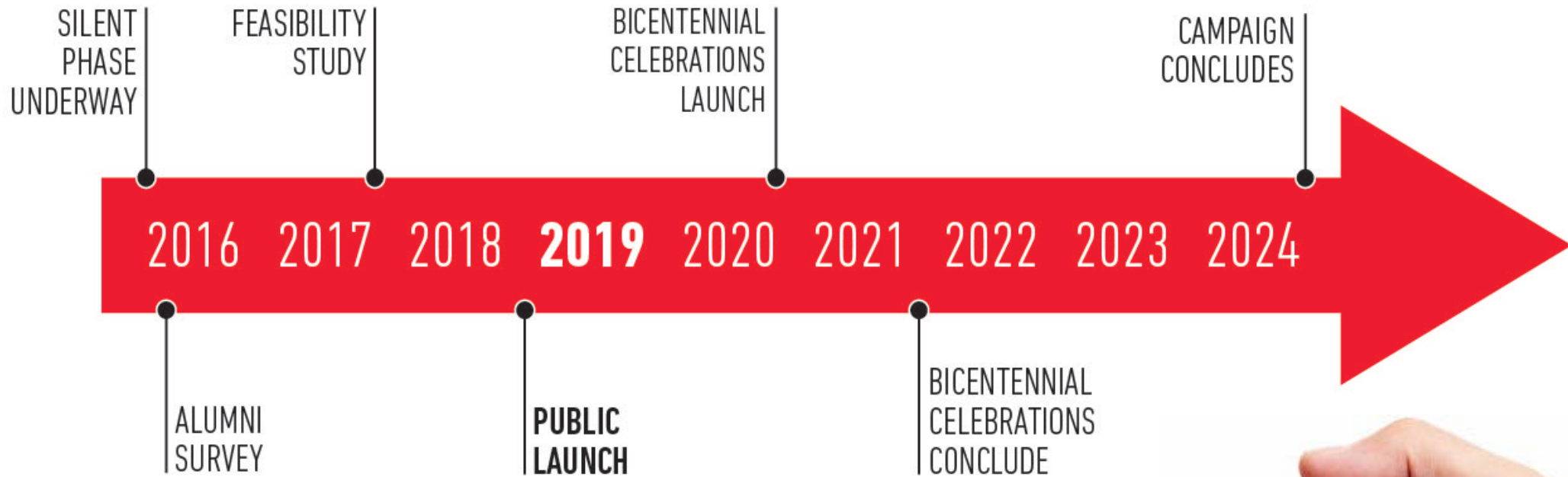
- Celebrate our amazing history
- Articulate what McGill stands for in its third century
- Define the big ideas where McGill can make a unique contribution
- Rally our alumni and supporters around this once-in-a-generation milestone
- Build foundations that can ensure McGill's excellence and competitive edge for years to come



# Campaign timeline



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- McGill invited to join the CASE 50
- Feasibility Study
  - Assesses campaign readiness, tests assumptions and case for support to ensure the best conditions for success
  - RFP launched
  - Expect to begin study in spring 2017



- Discussions to establish Campaign themes, priorities and Case for Support
  - Multidisciplinary, transformative ideas
  - Faculty needs and priorities
  - Pan-university initiatives and points of distinctiveness:
    - The McGill Commitment
    - McGill's international identity
    - Our core values: excellence and opportunity





- First comprehensive alumni survey since 2009
- 12,000 alumni respondents (11% response rate)
- Strong representation from key cohorts:
  - 30-50-year-old “emerging leaders”
  - 50-60-year-old loyal donor base
  - Young alumni (18-29 years old)





- The positive news:
  - Overall engagement increased significantly since 2009
  - Engagement well above Canadian university average and highest among peer group
  - High willingness to promote McGill and strong reputational response
  - Strong evidence that engagement correlates to giving, advocacy and activity participation
  - Most alumni associate most strongly with “McGill”, as opposed to any single Faculty or department





THE  
**McGILL**  
FUND

LE  
FONDS  
**McGILL**



# Engaging students



McGill

- Leveraging alumni connections as a means of enhancing the quality of the student experience, inside and outside the classroom
- Building a culture of philanthropy among students through digital fundraising platforms such as Seeds of Change and #McGill24
- Fostering alumni-to-student connections via online networking platforms like McGill Connect and Brazen



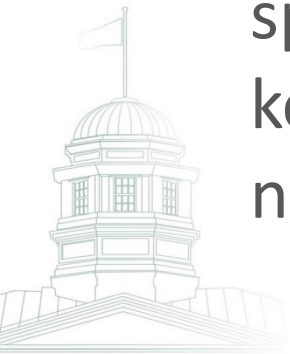
# The Road to 200



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**Showcasing the many ways McGill is changing how we understand our world as we approach our 200<sup>th</sup> anniversary**

- A multiplatform campaign to galvanize our alumni and donor communities in advance of the University's bicentennial and in preparation for our next fundraising campaign
- An opportunity to increase awareness of McGill's specific strengths and objectives, while test-driving key themes as we begin to develop our campaign narrative



# The Road to 200 themes



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HEALTHY BRAINS FOR HEALTHY LIVES



TOWARDS A SUSTAINABLE FUTURE



# The Road to 200 themes



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HUMANITY BEYOND BOUNDARIES



THE PROMISE OF BETTER HEALTH



# The Road to 200 themes



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INNOVATION & ENTREPRENEURSHIP



# Marketing and Branding

- Development of a cohesive visual identity to deploy across platforms
- A central hub set up on University Advancement's McGill Giving website
- Themed content included in communications to alumni and donors
- Collaboration with university partners to share content and cross-promote the Road to 200 through websites, events, etc.



The screenshot shows the McGill Giving website for the 'THE ROAD TO 200' campaign. The header includes the McGill Giving logo, navigation links (WAYS TO GIVE, WHERE TO GIVE, WHY GIVING MATTERS, MCGILL COMMITMENT, ROAD TO 200), and a 'GIVE NOW' button. The main content area features a grid of six thematic tiles: 'HEALTHY BRAINS FOR HEALTHY LIVES', 'TOWARDS A SUSTAINABLE FUTURE', 'HUMANITY BEYOND BOUNDARIES', 'INNOVATION & ENTREPRENEURSHIP', 'THE PROMISE OF BETTER HEALTH', and 'IN YOUR COMMUNITY'. The 'IN YOUR COMMUNITY' tile includes a call to action: 'We are bringing our celebrated researchers and experts on the road, showcasing how McGill discoveries are changing the world. Take part in a Road to 200 event near you. SEE EVENT LISTINGS'. Below the grid is a section titled 'THE ROAD TO 200' with a sub-header 'McGill Giving'. It contains three sub-sections: 'PRIORITIES' (with a collage of images), 'STORIES' (with an image of an open book), and 'EVENTS' (with a cityscape image). The footer features three buttons: 'TAKE A MOMENT', 'GIVE NOW', and 'CHANGE LIVES', followed by the McGill logo and the page number '14'.

# Signature events

- Beginning this fall, UA will host themed signature events in key alumni communities:
- Opportunities to showcase McGill's expertise across the five thematic pillars
- They will address probing questions at the heart of local and global concerns
- Diverse formats featuring McGill researchers, students, alumni and other leaders



## WHY DOES MEMORY FAIL US?

Please join McGill's Principal and Vice-Chancellor Suzanne Fortier at a cocktail dinatoire and panel discussion featuring leading brain researchers from the Montreal Neurological Institute. They will outline the advances that are being made in the field of memory loss, and the hope that these discoveries hold for those suffering from memory-related diseases.

The discussion will be introduced by neuroscience pioneer Dr. Brenda Milner, whose discoveries over an extraordinary seven-decade career have revolutionized our understanding of memory.

**WHEN** | Tuesday, September 20, 2016  
6 to 8 p.m.

**WHERE** | 40 Westt Steakhouse  
2305 Trans-Canada Highway  
Pointe-Claire

**RSVP** | By September 16  
Email: [event.registration@mcgill.ca](mailto:event.registration@mcgill.ca)  
Phone: 514-398-1248

A banner with a blue background and a white network of lines. The text "HEALTHY BRAINS FOR HEALTHY LIVES" is written in white capital letters on a dark blue rectangular background.

HEALTHY BRAINS FOR HEALTHY LIVES

# Looking ahead: FY17



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- Continuing to promote the Road to 200
- Refining Campaign themes, priorities and Case for Support
- Preparing for and executing feasibility study
- Using our new suite of digital tools to strategically engage alumni around the world
- Working with regional, Faculty-based and pan-University volunteers to promote, support and advance McGill's priorities
- Accelerating efforts to bring in transformative gifts to form the foundation of the next Campaign





McGill

THANK YOU





# ALUMNI RELATIONS & ANNUAL GIVING

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2015-2016 AT A GLANCE

# ALUMNI RELATIONS & ANNUAL GIVING

## 2015-2016 AT A GLANCE

Bolstered by an integrated alumni and development strategy, the Alumni Relations & Annual Giving unit is University Advancement's strategic lead on nurturing lifelong engagement among target markets; offering effective, targeted and strategic events; building pipeline capacity through a robust annual giving program; and raising awareness of philanthropy among students and young alumni. Our goal: to make McGill a vital and relevant partner for our community, from the moment they enter our campuses, and throughout their lives.

### ALUMNI DEMOGRAPHICS

GLOBAL ALUMNI NETWORK

**184**

{countries}

NUMBER OF ADDRESSABLE ALUMNI

**228,375**

{all full & partial email}

NUMBER OF NEW GRADUATES

**7,423**

{expected in June 2016}

### EVENT-BASED ENGAGEMENT

Local, national and international events are an important pillar in our engagement strategy, and run the gamut from expert panels, to donor recognition events, targeted cocktails, student send-offs, young alumni networking events, and more.

TOTAL NUMBER  
(NON-UNIQUE) OF ATTENDEES

**14,329**

TOTAL NUMBER  
OF EVENTS

**466**

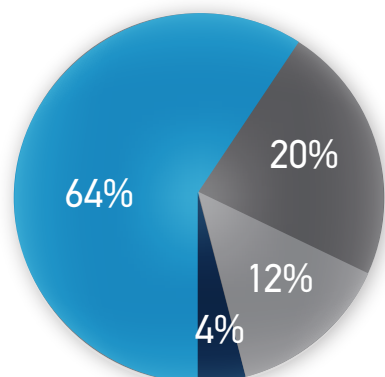
**17%** High capacity attendees

**11%** Young Alumni attendees

**9%** Low capacity/high affinity attendees

### HOMECOMING FIGURES

NUMBER OF EVENTS: **70**



TOTAL NUMBER  
(NON-UNIQUE)  
OF ATTENDEES:  
**4,054**

10% increase  
over 2014

ORIGIN OF ATTENDEES

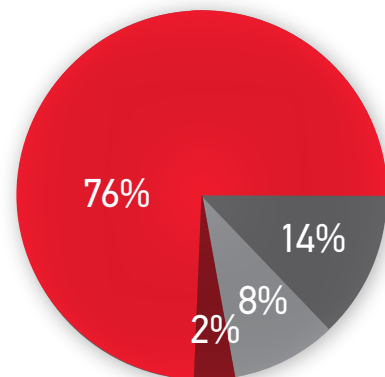
- **83%** Canada  
{**26%** from Montreal}
- **13%** USA
- **4%** International

High capacity attendees
  Young Alumni attendees
  Low capacity/high affinity attendees
  Other

### REUNION FIGURES

NUMBER OF EVENTS: **96**

{91 classes and 5 affinity groups}



TOTAL NUMBER  
OF ATTENDEES:  
**733**

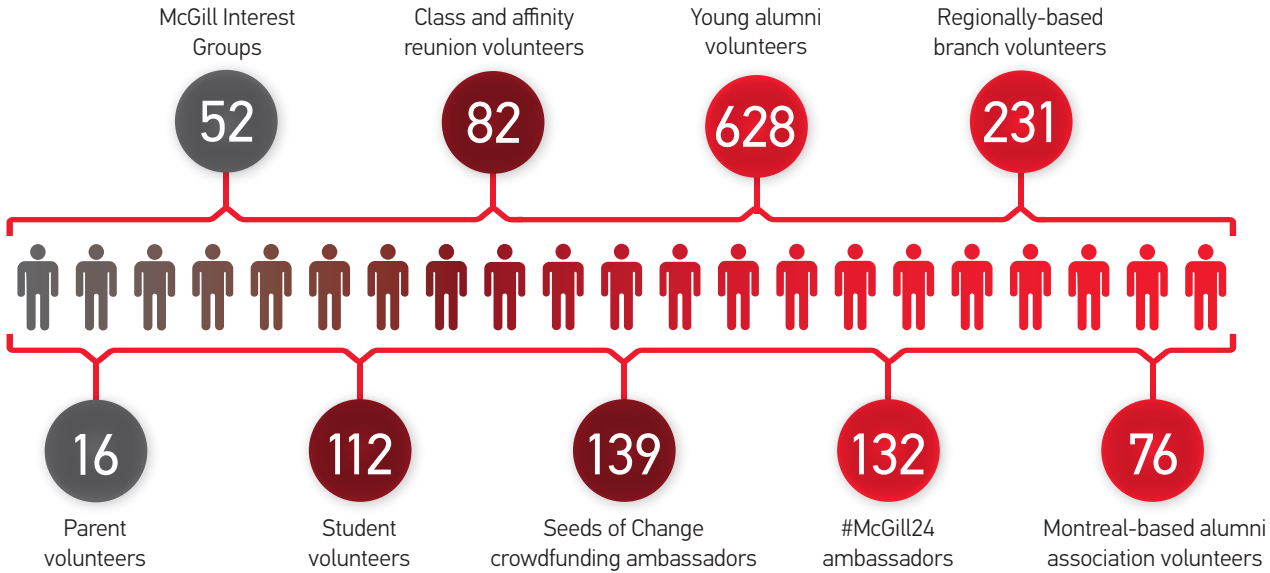
High capacity attendees
  Young Alumni attendees
  Low capacity/high affinity attendees
  Other

# ALUMNI RELATIONS & ANNUAL GIVING

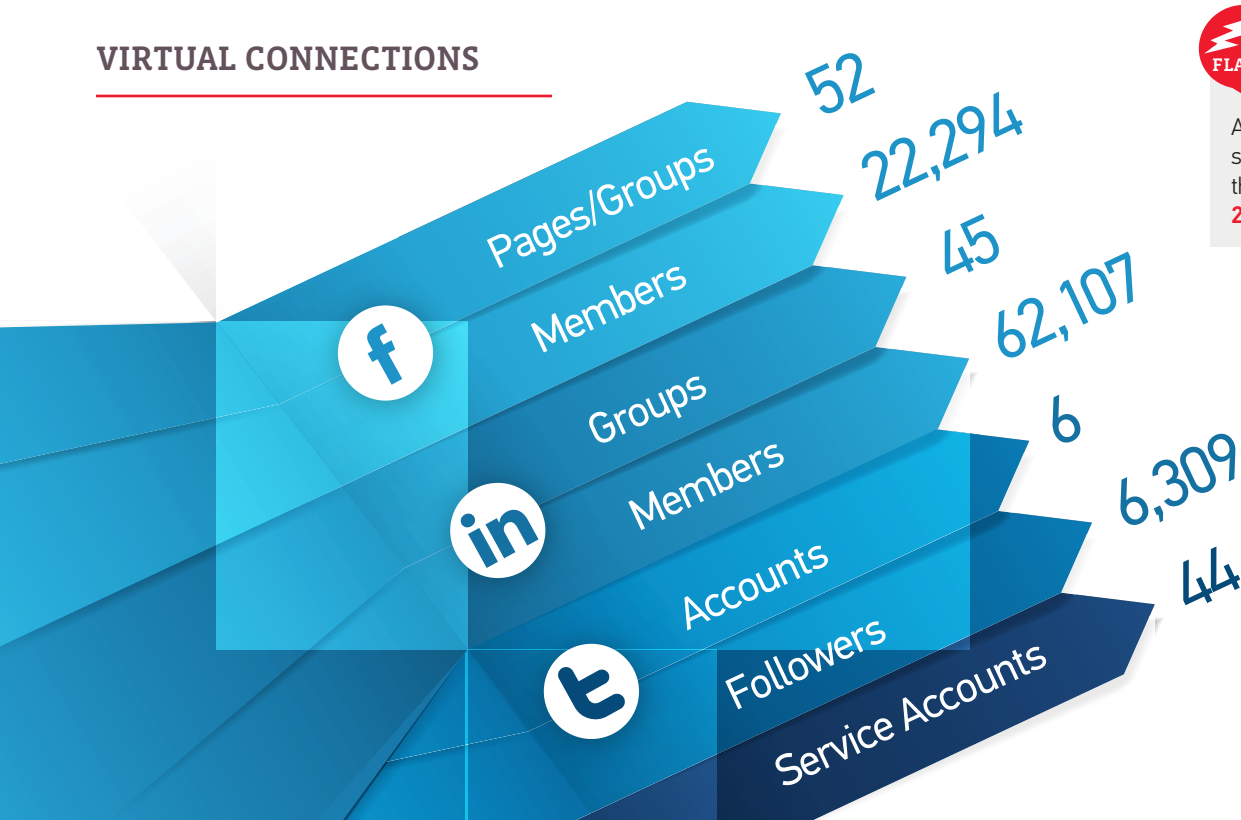
## 2015-2016 AT A GLANCE

### VOLUNTEER CONNECTIONS

Volunteers are the lifeblood of advancement work and serve as McGill's ambassadors in a myriad of ways: by participating on alumni Boards, committees and branches; by attending student recruitment events and raising McGill's profile through social media; by mentoring young alumni and sharing their expertise as advisors, and much more. Personal outreach to alumni around the world not only builds affinity, but helps us build the McGill brand worldwide.



### VIRTUAL CONNECTIONS



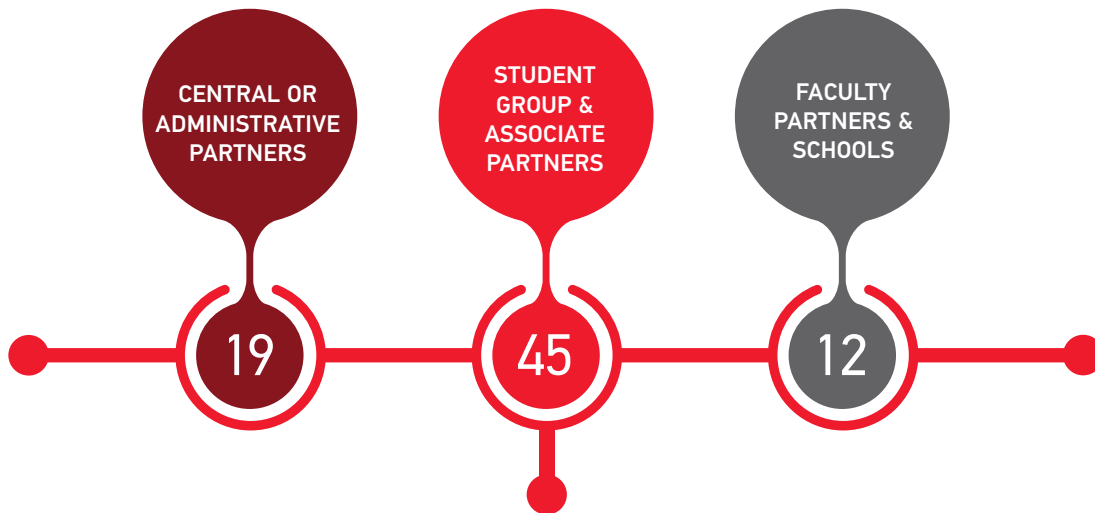
**FLASH**  
AR&AG team members submitted **30%** of all Feed the Lead forms and completed **2,674** contact reports.

# ALUMNI RELATIONS & ANNUAL GIVING

## 2015-2016 AT A GLANCE

### CAMPUS PARTNERSHIPS

Our strong campus partnerships are helping us connect with students before they graduate, creating a seamless transition to their alumni experience. Growing collaborations in areas such as yield and recruitment, mentoring and internships, career programming and entrepreneurial endeavours are just some of the ways we are working to establish lifelong relationships with our students.



### STUDENT SPONSORSHIP PROGRAM OF THE MAA

NUMBER OF STUDENT GROUP BENEFICIARIES

36

NUMBER OF APPLICATIONS

39

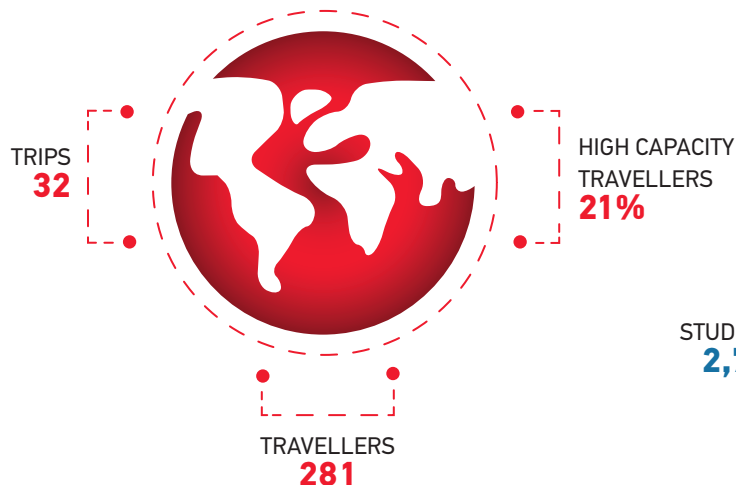
SPONSORSHIP DOLLARS AWARDED

\$16,700

### AFFINITY SERVICES

Affinity services offer alumni competitive or discounted rates on a variety of exclusive services that, in return, provide McGill with revenues in support of alumni programming priorities.

#### EDUCATIONAL TRAVEL



#### INSURANCE POLICY HOLDERS

14,339

#### CREDIT CARD HOLDERS

STUDENTS  
2,701

ALUMNI  
7,160

# ALUMNI RELATIONS & ANNUAL GIVING

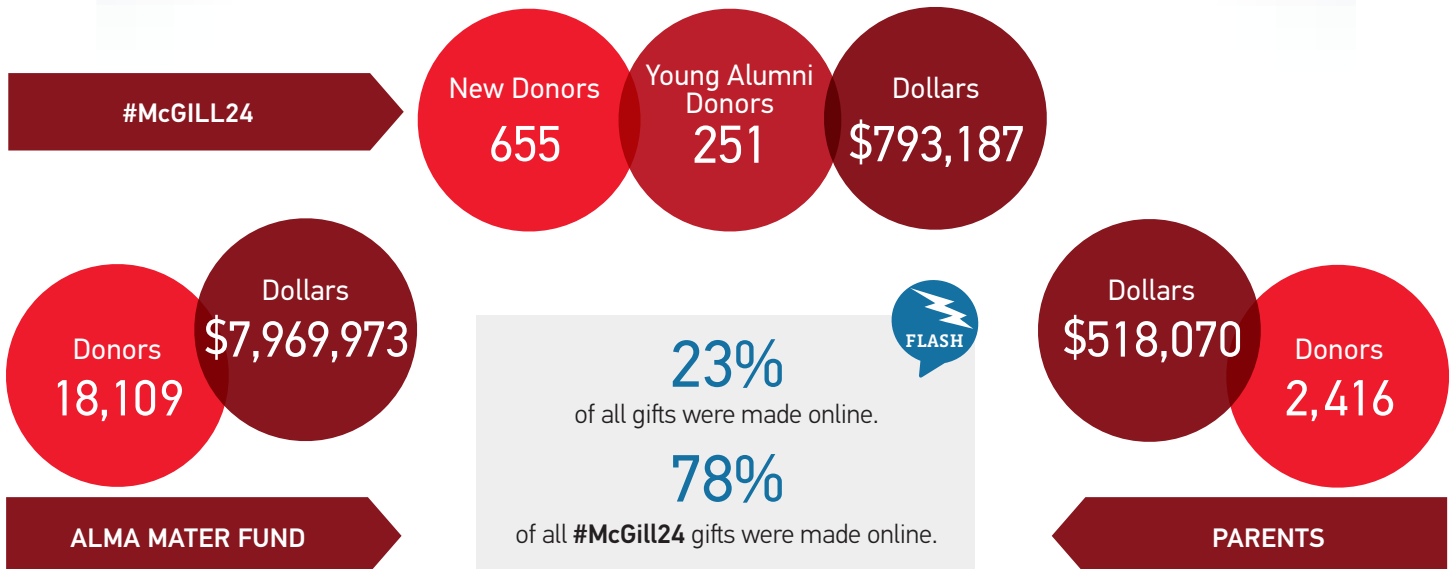
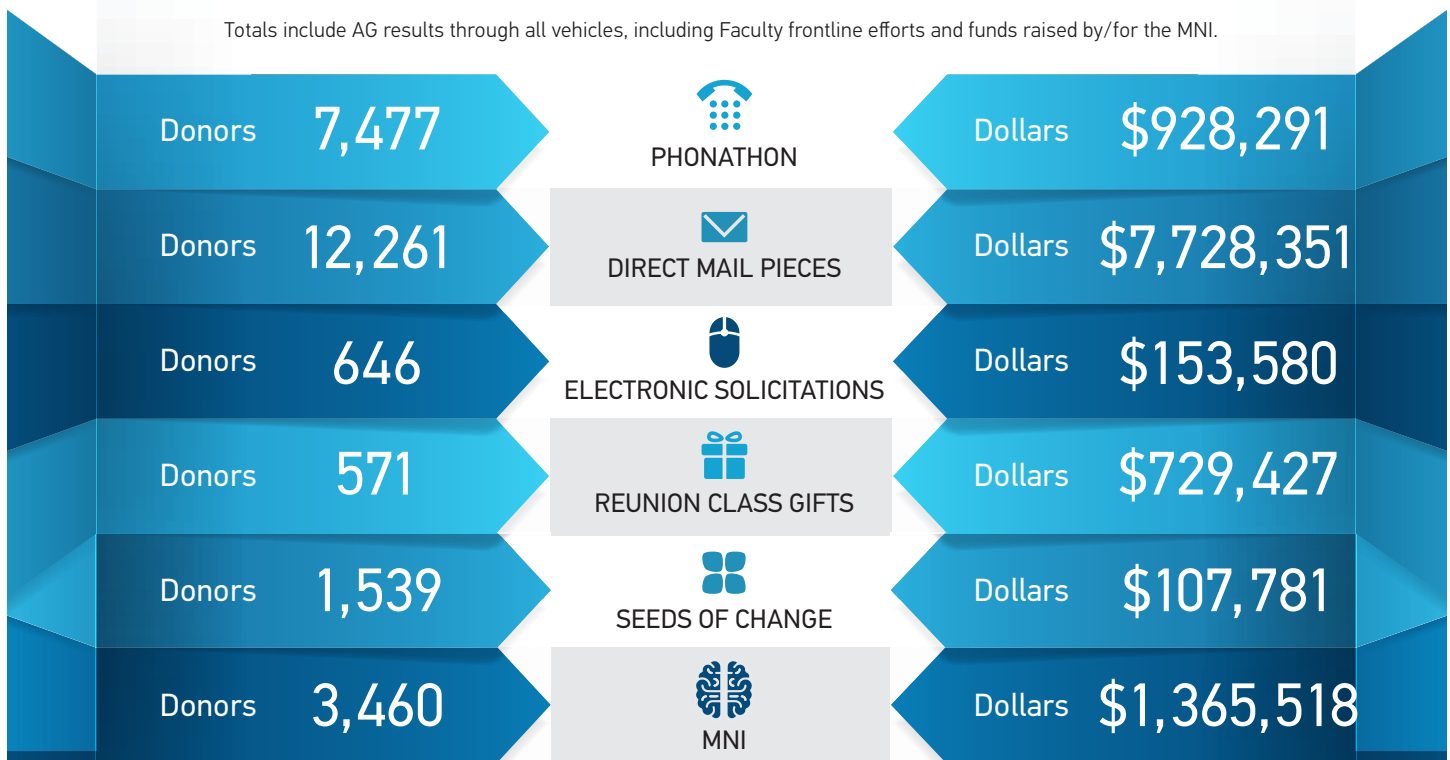
## 2015-2016 AT A GLANCE

### ANNUAL GIVING

Annual Giving is the foundation of McGill's fundraising efforts. Through a robust range of programs targeting alumni, parents and friends of all ages and stages of giving—including our innovative **Seeds of Change** crowdfunding platform, and this year's highly successful **McGill24 Day of Giving**, AG is expanding McGill's base of support while cultivating the transformative philanthropists of the future.

TOTAL DONORS **25,954** TOTAL DOLLARS **\$11,012,948**

Totals include AG results through all vehicles, including Faculty frontline efforts and funds raised by/for the MNI.



## GENERAL AWESOMENESS

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Winner of the CASE District I Alumni Relations Programming  
for All Constituencies Silver Award for Parents Tent

Winner of the CASE District I Social Media Alumni  
and Advancement Programs Bronze Award for the  
McGill Red & White Bucket List

### TEAM MEMBERS:

Gabrielle Korn (*Managing Director*), Andra Armasu, Lisa Baum, Chelsea Bell, Kathy Bowman, Olivia Brassard, Melissa Calderisi, Alvin Chung, Nathan Clinansmith, Kay Dass, Trish Duff, Melissa Forster, Anna Galati, Joella Gencher, Stephanie Hip, Ali Janjua, Tess Kelley, Pina Lanni, Lynn Mark, Véronique Marquis, Valerie Mauer, Ayesha Mayan, Hilary Morden, Jillian Pranger, Jesse Radz, Alesia Rudnitskaya, Amanda Rushton, Wendy Schilling, Jacob Spitzer, Shana Szikman, Lisa Tang, Nick Tonin, Mary Wong

### WORK-STUDY STUDENTS:

Helin Azizoglu, Deanna Duxbury, Laura Eves, Zahra Khambaty, Yu Fei Ma, Rebecca Summers, Julia Zhu

### PHONATHON STUDENTS: 65+

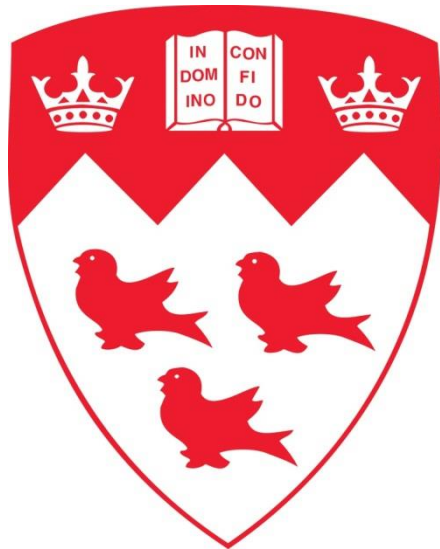
## THE FINE PRINT

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1. Event numbers include all centrally-managed activities, including those volunteer-driven branch events and Faculty-initiated functions created in MartNet. Registration is not always taken for Student & Young Alumni events.
2. Volunteer data comprises alumni association representatives, including branch, constituent and special interest groups, as well as special cohorts such as parents and digital campaign ambassadors that fall under the auspices of AR&AG. They do not include larger University-wide volunteers, such as members of PIAB or FABs.
3. Virtual outreach figures extend to social media outlets that serve the wider alumni association volunteer network as managed by the AR&AG team. They do not include UA or Faculty-specific communications tools and outlets.
4. All information as at April 30, 2016.



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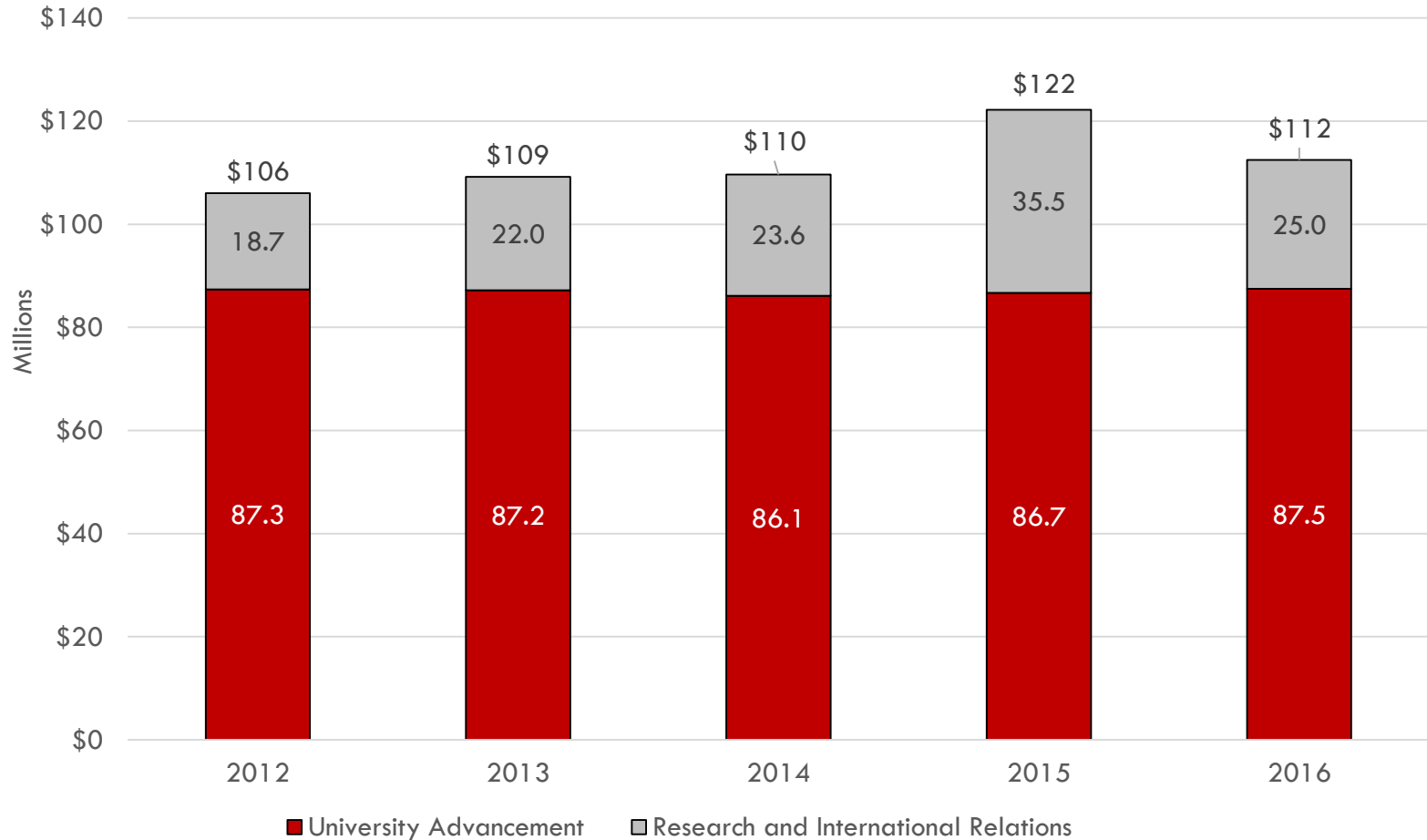


# University Advancement

## Fiscal Year 2016 End of Year Review

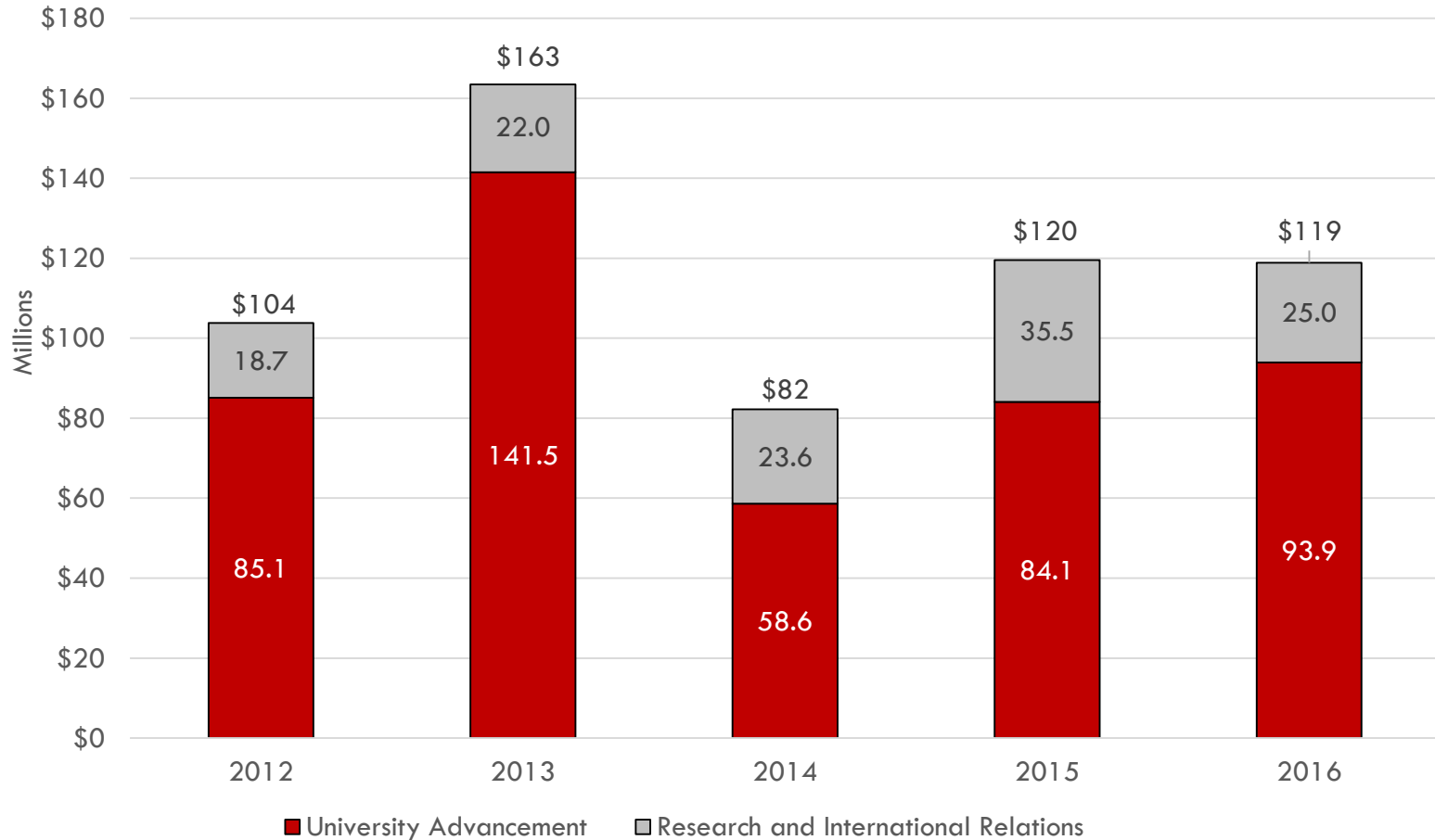


# UA Cash: 5-Year Results



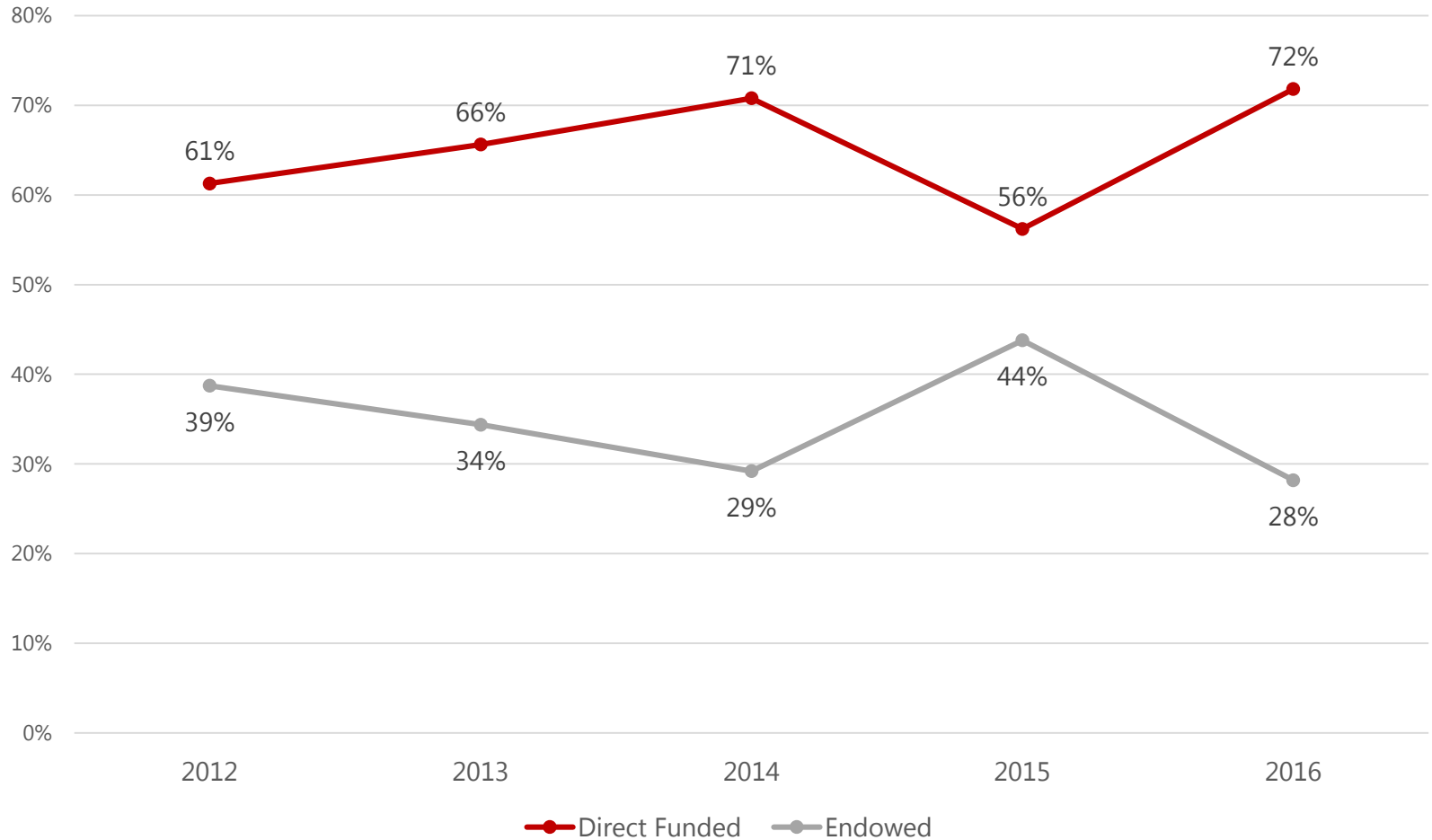


# UA Commitments: 5-Year Results





# UA Endowed vs. Direct: 5-Year Results

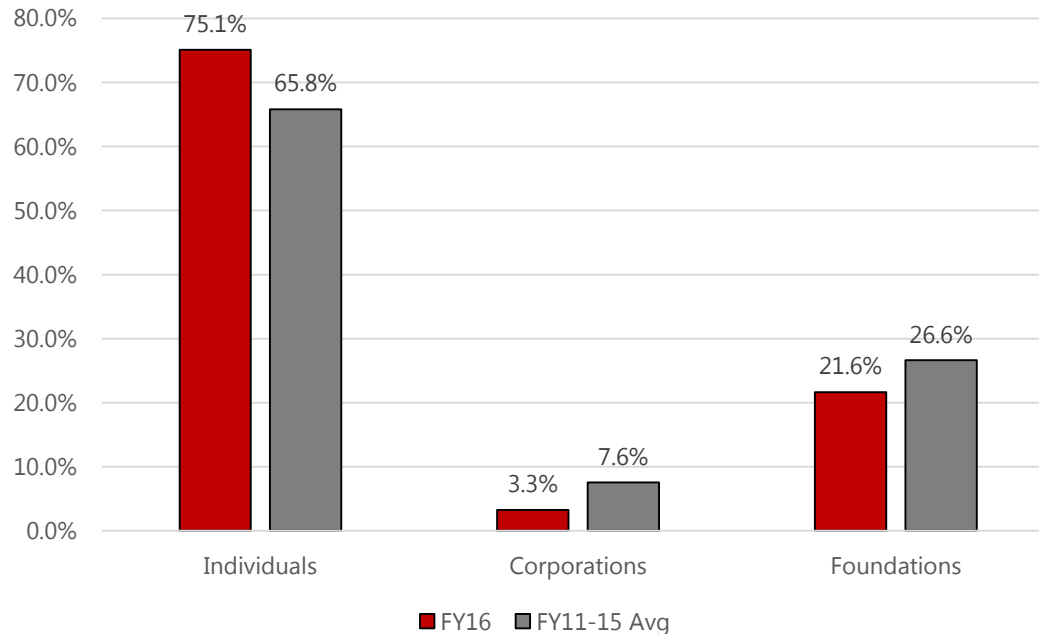


Note: Results are by commitments



# FY16 UA Commitments: by Source

| Source       | Amount        | Percentage    | FY11 – 15 Average |
|--------------|---------------|---------------|-------------------|
| Individuals  | \$70.5        | 75.1%         | 65.8%             |
| Corporations | \$3.1         | 3.3%          | 7.6%              |
| Foundations  | \$20.3        | 21.6%         | 26.6%             |
| <b>Total</b> | <b>\$93.9</b> | <b>100.0%</b> | <b>100.0%</b>     |





# FY16 UA Commitments by Individuals: Regional

| Region         | Amount        | Percentage    | FY11 – 15 Average |
|----------------|---------------|---------------|-------------------|
| Quebec         | \$43.4        | 61.6%         | 55.2%             |
| Rest of Canada | \$12.1        | 17.2%         | 25.6%             |
| International  | \$15.0        | 21.3%         | 19.2%             |
| <b>Total</b>   | <b>\$70.5</b> | <b>100.0%</b> | <b>100.0%</b>     |

