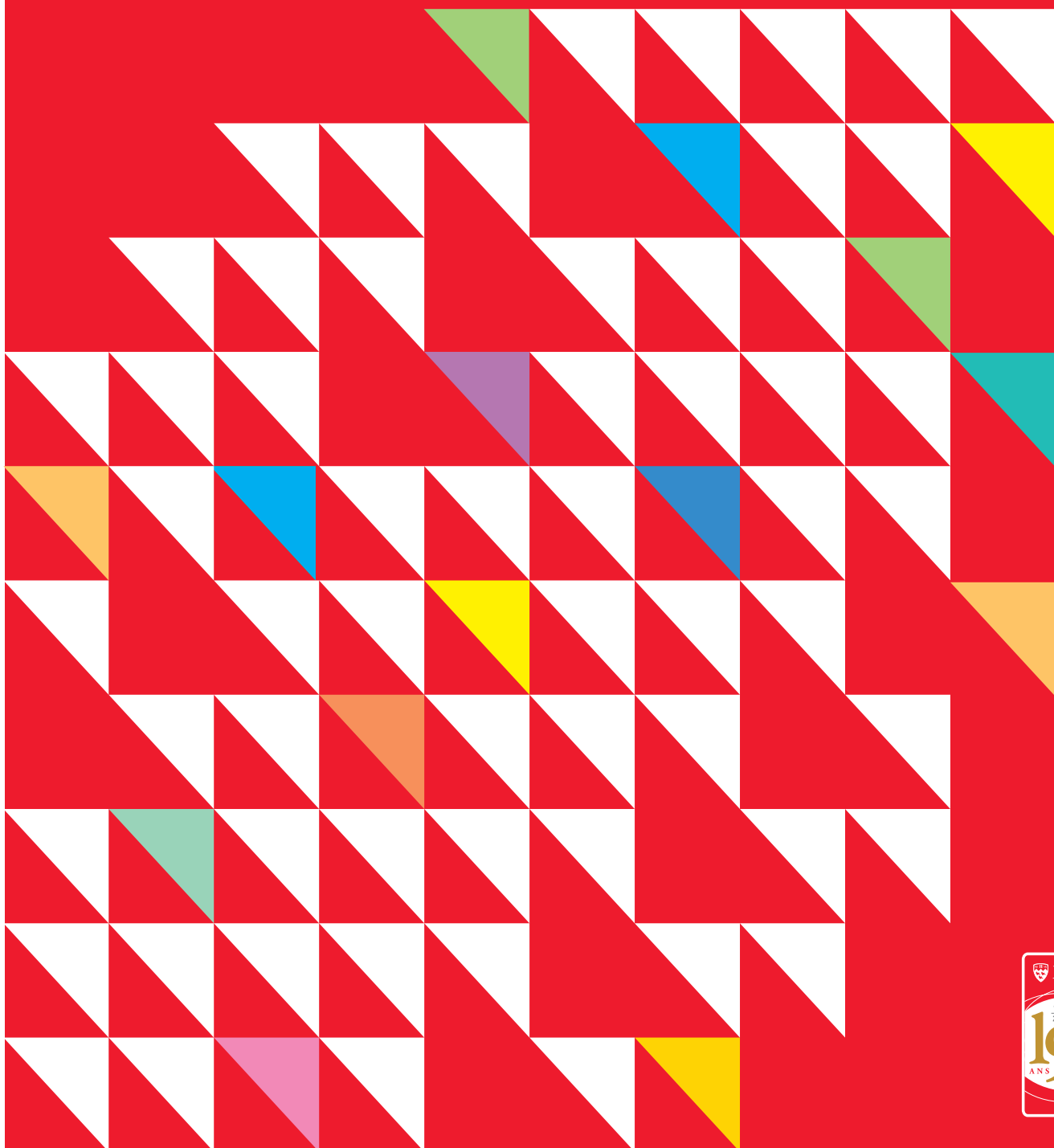




CAMPAIGN  
**McGill**

HISTORY IN  
THE MAKING

# McGill's Annual Report on Philanthropy: 2010-2011



# Message from the VP



**I**t is my pleasure to present to you this Annual Report on Philanthropy FY11, which summarizes the achievements of Campaign McGill across a broad spectrum of activities over the last fiscal year.

After a challenging couple of years, I am pleased to report that, overall, the news in FY11 was generally positive. Despite a truncated fiscal year, Campaign McGill generated \$65.1 million in gifts and pledges: an increase of 22% over the same period the previous year. Other encouraging trends included the exponential increase in the numbers of donors making gifts of \$1 million and up (from 9 in FY10 to 20 in FY11), the upswing in Major Gifts revenues (again, despite an 11-month fiscal year), our record-breaking Annual Fund results and our continued strong performance in attracting new Planned Giving commitments.

To what can we attribute these heartening outcomes? To some extent, our numbers reflect a rebound in charitable giving felt across all sectors since the calamitous depths of the most recent “great recession” (Giving USA reports that total estimated charitable giving in the US rose by 3.8% in 2010, with the education sector rising by 5.2%). This is certainly not the whole story, however.

As I have reported in the past, over the last five years, we have undertaken a top-to-bottom overhaul in our fundraising operations. From improving our fundraising metrics, enhancing our talent management practices and improving our data mining capabilities, to creating more targeted communications tools and alumni events, enriching our donor stewardship and enhancing our support for volunteers, we have created a fundraising operation that reflects the best practices of the most successful institutions in Canada and around the world. At the heart of this effort is my wonderful team at DAR, whose creativity and talent are reflected on every page of this report.

Of course, significant challenges remain. Despite some improvements in donor confidence, financial markets remain unstable and the threat of a second and even a third recession looms large. At the same time, competition for fundraising dollars is greater than ever before, with several of our sister institutions across the country launching major campaigns this year. And, of course, in the face of continued resource challenges from public and private sources, McGill’s revenue needs continue to climb.

To meet these challenges, we at DAR are continuing to refine our operations to make sure that we are making the most of our fundraising opportunities. At the same time, the university-wide Strategic Reframing Initiative is helping us define the most effective means by which we can increase revenues and improve efficiencies.

But in order to truly succeed not just in FY12 or until the conclusion of Campaign McGill, but for the long-term future, we need to think even more expansively. Successful fundraising does not just occur within the walls of an advancement division, but requires an institution-wide “culture of philanthropy” that penetrates every Faculty, every department, every administrative division and every tier of activity. This is a challenge that I have presented to my colleagues across the institution, and which I will continue to champion at every opportunity as we collectively work to build McGill’s future. It is a challenge and an opportunity that I extend to you, and which I look forward to pursuing collaboratively as we address the challenges of the year ahead.

Marc Weinstein, BA’85, BCL’91, LLB’91  
Vice-Principal (Development and  
Alumni Relations)  
November 2011





## Campaign McGill: Building McGill's Future

**S**ince the initial bequest from James McGill that established McGill University 190 years ago, philanthropy has been at the very heart of our success. Campaign McGill is just the latest manifestation of the core value of giving, which allows McGill to punch above its weight and outperform its peers year after year, across our Faculties and departments. Here are just a few examples of the impact Campaign McGill is having on our students, our Faculty and our community:

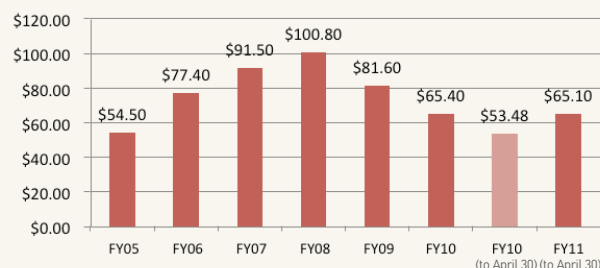
- ▶ Contributing more than \$200 million towards student support
- ▶ Creating more than 400 new scholarships, fellowships, bursaries and awards
- ▶ Funding more than 40 new endowed Chairs
- ▶ Building more than \$90 million of new teaching and research infrastructure
- ▶ Attracting the support of more than 83,000 donors

# Campaign Overview

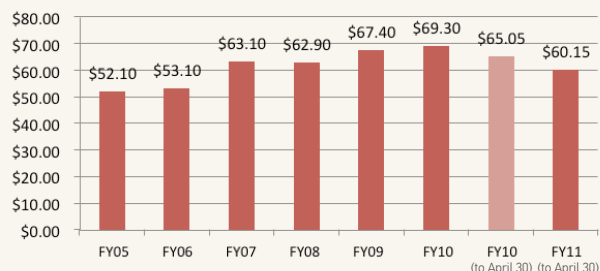
**L**ast year, Campaign McGill generated over \$65 million in gifts and pledges, despite an abbreviated 11-month fiscal year. This represents an increase of almost 22% over the same period in FY10: a positive trend that reflects both increased donor confidence and the dividends of DAR's ongoing efforts to refine and enhance its fundraising architecture. On the cash side, revenues were down slightly from the same period last year, as the effects of the financial crisis began to impact revenues from pledge payments.

In terms of where our donations originate, alumni continue to provide more than half of our Campaign gifts, suggesting the success of our engagement and communications programmes. The regional breakdown confirms yet again that our local markets—Quebec and Ontario—remain the most fruitful loci for our fundraising efforts, while the US and international pools represent important growth opportunities for the future.

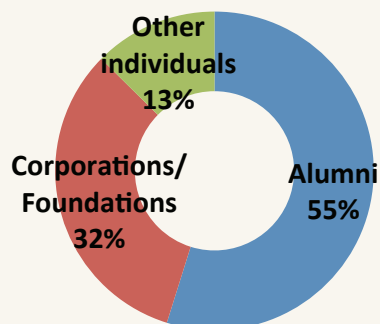
**Campaign Gifts and Pledges**  
(in millions of \$)



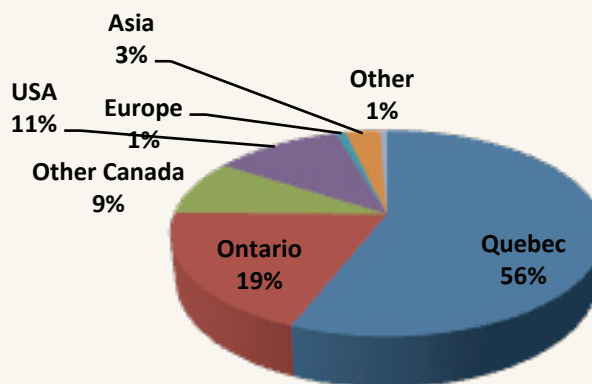
**Campaign Cash Revenues**  
(in millions of \$)



**Campaign breakdown by source (2010/ 2011)**



**Campaign breakdown by region (2010/ 2011)**





## The Healthier Societies Initiative:

A gift from McGill's Chancellor is helping build better health care systems



**I**n October of 2010, McGill announced that its Chancellor, H. Arnold Steinberg, CM, had made an extraordinary gift of \$2.4 million to kick-start a major new interdisciplinary research and teaching program aimed at creating a new road map for the future of health care delivery.

Based at McGill's Institute for Health and Social Policy, the Healthier Societies Initiative is a five-year, cross-faculty effort that will map what works and what doesn't in the health systems across the world's leading economies and then rigorously examine those systems in order to develop more effective – and affordable – health-care delivery.

"It's increasingly clear the medical delivery system is on a serious collision course," said Mr. Steinberg, a McGill alumnus (BComm '54), who became McGill's 18th Chancellor in July 2009. "We're well past the point of being unsustainable." A lifelong champion of health-care causes, Steinberg spearheaded this initiative. "I've been talking about this particular idea for several years now. It's essential that universities modify their course and training offerings to service the huge demands that health-care delivery requires."

McGill Principal Heather Munroe-Blum said she is deeply grateful for Steinberg's "outstanding generosity, his visionary leadership, and his deep commitment to addressing one of the critical issues of our time." "I know one of Mr. Steinberg's great passions is health care, and I am tremendously proud he has chosen to entrust his vision with our world-class researchers here at McGill." ▼

### Quick Facts

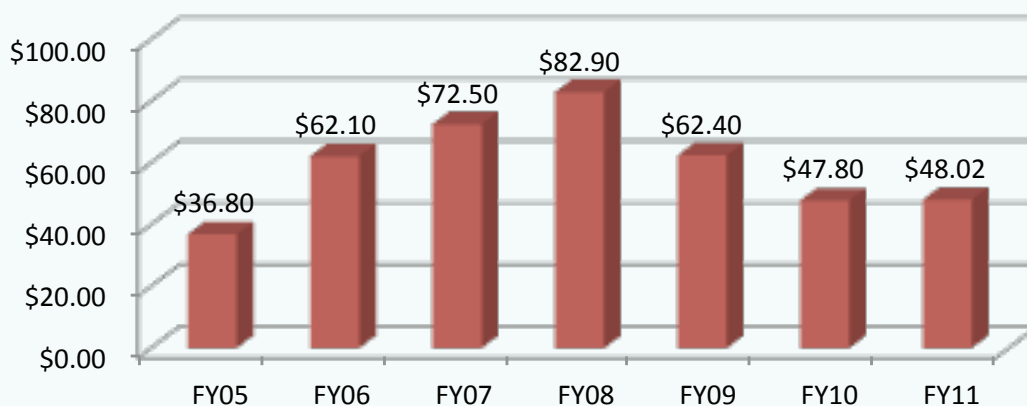
- ▼ Campaign McGill raised \$65.1 million in FY11, up almost 22% from the same period in FY10
- ▼ Almost 32,000 donors gave to the Campaign in FY11
- ▼ Cash revenues were \$60.15 million, down about 8% from the same period in FY10. This reflects the deferred impact of the financial crisis on income from pledge commitments made in earlier years
- ▼ Alumni continue to support Campaign McGill to a degree unmatched by most other institutions. More than half of Campaign revenues came from our loyal graduates
- ▼ Quebec and Ontario remain our most important markets, providing more than three quarters of Campaign revenues. International donors contributed about 16% of the total in FY11

# Major Gifts

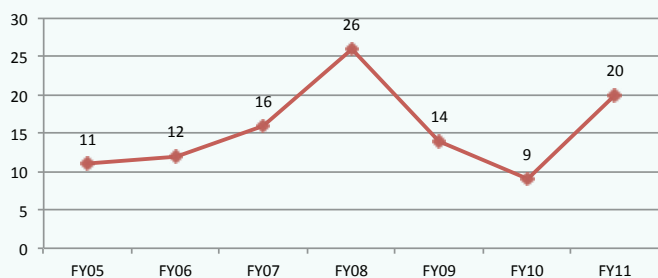
**A**t the heart of McGill's fundraising enterprise is our Major Gifts programme, representing contributions of \$100,000 and up. In FY11, Major Gifts generated \$48 million: almost three quarters of total Campaign achievements. This represents a slight increase over Major Gifts commitments in FY10 despite the shortened calculation period: in other words, we secured more dollars in gifts and pledges in less time than in the previous fiscal year.

Other promising signs in this segment included an exponential increase in the number of donors making gifts of \$1-million and over, up an exceptional 122% from FY10 (reflecting increased donor confidence as well as the success of our Primary Gifts programme). At the \$100,000 - \$999,999 level, donor numbers continue to remain relatively steady since their peak in FY08, affirming that the loyalty of our high-end donors remains strong even in the face of volatile financial conditions.

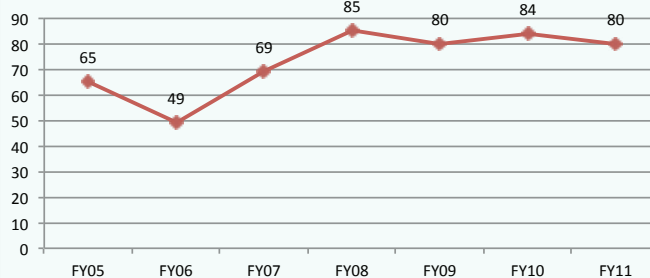
**Major Gifts by Fiscal Year  
(in millions of \$)**



**\$1 million and above donors**



**\$100K - \$999K donors**



## The Power of Partnership: \$3-million gift from three leading donors creates new Chair in Medical Education



**I**n November, 2010, The Richard and Sylvia Cruess Chair in Medical Education was publicly announced. This new endowed Chair was created by generous gifts of \$1 million each from three sets of donors: Mrs. Deirdre Stevenson and Dr. Robert Stevenson, Mr. Herbert Black, and The Molson Foundation. Named in honour of internationally recognized McGill physicians and educators Drs. Richard and Sylvia Cruess, the Chair was awarded to the McGill Centre for Medical Education's director Dr. Yvonne Steinert.

"We are overjoyed by this honour and deeply grateful to our friends who are responsible for it," said Dr. Richard Cruess. "It is exactly the type of legacy that we would both like to leave." Dr. Sylvia Cruess added: "This new Chair will ensure that the art and science of pedagogy, which has begun to make medical education so effective, will continue to have an impact at McGill and beyond. Thanks to our friends' extraordinary generosity, the field of medical education at McGill will continue to flourish, building on the work of our many McGill colleagues over the years."

Based at McGill's Centre for Medical Education since 1995, Drs. Richard and Sylvia Cruess have been recognized for their original contributions to the understanding of medical professionalism and its relationship with medicine's social contract. They have spoken around the world and published extensively on the definition of medical professionalism, as well as how to teach and evaluate it. Dr. Richard Cruess is a former Chair of Orthopedic Surgery and Dean of McGill's Faculty of Medicine. Dr. Sylvia Cruess is an endocrinologist and Professor of Medicine who served for 18 years as the medical director of the Royal Victoria Hospital.

"This is an extraordinary example of our loyal McGill community working together to realize Campaign McGill's vision of addressing critical global challenges," said Marc Weinstein, Vice-Principal (Development and Alumni Relations). ▽

### Quick Facts

- ▽ Major Gifts achievements were up slightly from FY10 despite an 11-month fiscal year
- ▽ Major Gifts constituted nearly 75% of Campaign revenues in FY11
- ▽ Numbers of donors making gifts of \$1-million and up increased by 122% from FY10
- ▽ Donor numbers at the \$100,000 - \$999,000 level remained relatively steady, as they have since 2008

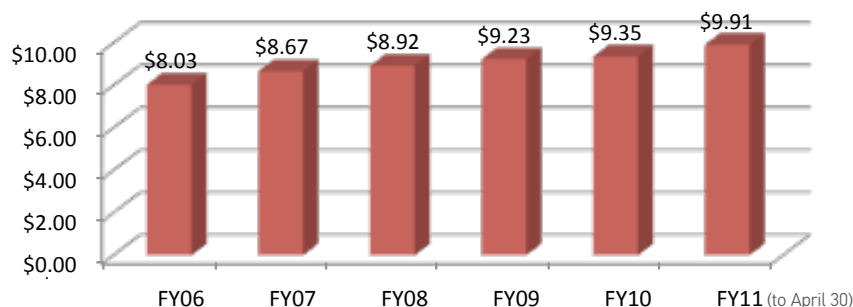


# Annual Fund

**L**ast year was another record-breaking year for the Annual Fund, which generated \$9.91 million in cash: up almost 6% from FY10 despite an 11-month fiscal year. Gifts from new donors increased by 14% and prior year donors increased their giving by 11%. All faculties except one surpassed their FY10 annual gift totals, and more than 2,000 donors made gifts of \$750 or more to the Alma Mater Fund in FY11 (the Annual Fund's largest segment); these donors increased their giving by an average 5%.

These impressive totals do not just showcase our success in attracting, nurturing and retaining loyal annual donors, but represent the pipeline that will help build the future of our Primary and Major Gifts programmes.

**Annual Fund-- cash revenues**  
(in millions of \$)



| ANNUAL FUND GIVING BY FACULTY | FY09               | FY10               | FY11               |
|-------------------------------|--------------------|--------------------|--------------------|
| Agr and Env Sciences          | \$374,478          | \$385,519          | \$471,729          |
| Arts                          | \$611,713          | \$581,663          | \$676,862          |
| Athletics                     | \$422,702          | \$348,475          | \$358,632          |
| Continuing Studies            | \$16,964           | \$32,539           | \$49,039           |
| Dentistry                     | \$302,504          | \$337,607          | \$357,051          |
| Education                     | \$125,190          | \$159,323          | \$128,141          |
| Engineering                   | \$946,084          | \$954,430          | \$1,035,070        |
| Law                           | \$606,785          | \$664,192          | \$573,716          |
| Libraries                     | \$658,640          | \$645,767          | \$627,980          |
| Medicine                      | \$1,334,426        | \$1,218,750        | \$1,356,998        |
| Management                    | \$695,531          | \$871,695          | \$880,265          |
| MNI                           | \$990,502          | \$831,970          | \$1,162,140        |
| Music                         | \$170,075          | \$211,078          | \$181,612          |
| Religious Studies             | \$9,321            | \$14,308           | \$14,807           |
| Science                       | \$550,533          | \$584,164          | \$566,615          |
| University-Wide               | \$1,419,569        | \$1,507,747        | \$1,469,174        |
| <b>TOTAL</b>                  | <b>\$9,235,017</b> | <b>\$9,349,227</b> | <b>\$9,909,830</b> |

## Helping students make a difference across the globe



For most McGill students, winter means navigating Montreal's icy sidewalks and contending with bitter cold. But for the 38 students who participated in the Canadian Field Studies in Africa (CFSIA) program last year, the winter season included the sights of elephants trumpeting in the Maasai Mara National Reserve and devastating poverty in the sprawling Kibera slums. This project was one of several supported last year by gifts to the Seeds of Change programme of McGill's Alma Mater Fund.

Professor Thom Meredith, CFSIA's program manager, believes that interacting with local communities, agencies and academics allows McGill students to gain a deeper understanding of the obstacles and opportunities facing Africans, something they simply could not glean from a textbook. Professor Meredith sees this direct involvement as essential to the program's success, emphasizing that "a good education means that we're not isolated from the environment we're in."

The Field Studies semester begins in Nairobi, where students learn about health in East Africa from the Kenyan AIDS NGO Consortium. They then visit the United Nations regional headquarters to see firsthand the institutional solutions for local health and poverty issues. Finally, participants visit the Kibale Health and Conservation Centre in neighbouring Uganda to learn about primates, ecology and health with McGill Professors Lauren and Colin Chapman.

This experiential education is complemented by serious coursework. Throughout their stay in Africa, students carry a full 15-credit load, made up of classes in areas such as Geography, Anthropology and Natural Resource Sciences, taught by dedicated professors from Canada and Kenya.

The effects of this experience linger long after students have returned to Canada, as the perspective they gain encourages them to become active supporters of sustainable development in Africa. And as CFSIA returns to the same communities year after year, Professor Meredith explains, "McGill builds bridges with the African context and gives back to those we work with." ▼

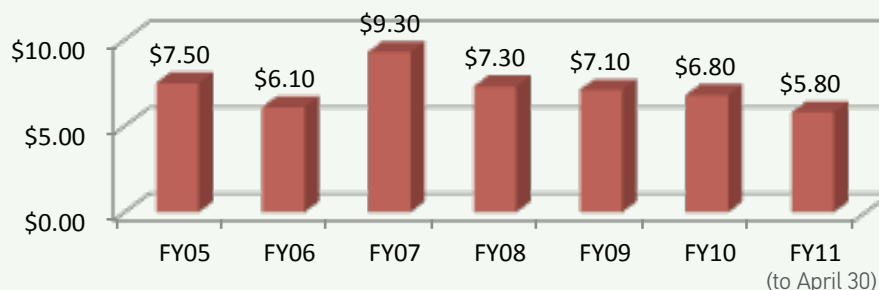
### Quick Facts

- ▼ The Annual Fund raised \$9.91 million in cash in FY11: up 6% from FY10 despite the shortened fiscal year
- ▼ A record 31,301 donors gave to the Annual Fund in FY11
- ▼ Gifts from new donors increased by 14% and prior year donors increased their giving by 11%
- ▼ Gifts to the Parents Fund broke the \$500,000 mark for the first time ever with a 24% increase from FY10, closing the year with \$541,445 raised from a record 3,821 parent donors
- ▼ More than 2,000 donors made gifts of \$750 or more to the Alma Mater Fund in FY11. Donors at this level increased their giving by 5%

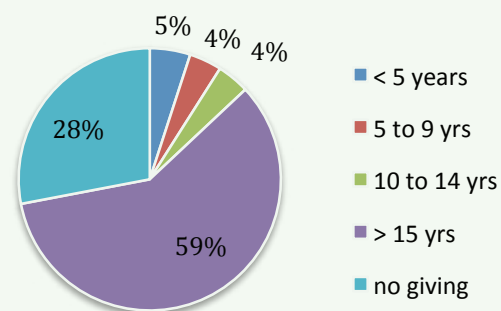
# Planned Gifts

**P**lanned Giving is a key element of McGill's fundraising programme, with realized bequests and other planned gifts generating more than \$50 million for the University since Campaign McGill began. In FY11, realized Planned Gifts were down slightly from the previous year, although, given the inherent unpredictability of this segment, such comparisons are relatively insignificant. More telling is our success in steadily increasing the number of Planned Giving commitments we secure each year. Although FY11 saw slightly fewer new commitments than in record-breaking FY10, the total of 141 new commitments still represents an increase of more than 213% from FY05. This is largely due to the increased efforts of our front-line fundraisers, for whom securing Planned Giving commitments has become a key element of their annual merit plan. Success in Planned Giving also reaffirms the importance of retaining loyal donors, as almost 60% of those who realized a Planned Gift during the Campaign had given to McGill for 15 years or more in their lifetime.

**Realized Planned Gifts**  
(in millions of \$)



**Giving Loyalty: planned gift donors**  
(entire Campaign)





## Leaving a lasting legacy



**“W**e were fortunate to have had a good education,” says Lili de Grandpré. “We have a strong belief in the importance of education, as it makes for a more fulfilling life and opens up opportunities.”

“We’ve chosen to invest in education, which has countless benefits,” adds David James. The couple has no children and made their estate plans several years ago to include the specific areas most important to them – including McGill.

The couple met in 1971 while studying journalism, and later attended McGill on separate occasions: Lili received her MBA in 1981, while David acquired a Certificate in French in 1998. David also holds an MBA from York and worked as a journalist and management consultant. Changing career paths in 1997, he is now a successful artist who creates luminous sculptures cast in glass and bold exterior works carved in stone. Lili is founder and managing director of CenCEO Consulting which designs and implements organizational performance strategies for corporate clients. Involved for many years, she was president of the McGill alumni branch in Toronto in the 1980’s and she now serves as vice-chair of McGill’s Board of Governors.

Since 1986, they have supported McGill and more recently have chosen three areas: the Desautels Faculty of Management, the McGill Institute for the Study of Canada, and the Medical Simulation Centre – through annual gifts, campaign gifts, and now a planned gift.

David points out that many people might not be aware of the risks involved with not planning ahead. “Do you know what happens if you don’t have a will?” he asks.

Lili adds, “Remember it’s just like any big decision in your life, such as getting married or buying a house. We finally overcame our inertia to make sure the decision was not made by somebody else.” ▼

### Quick Facts

- ▼ Realized Planned Gifts declined by \$1 million in FY11 when compared to the previous year
- ▼ Planned Giving commitments declined slightly in the shortened FY11 fiscal year, but remain 213% higher than in FY05
- ▼ Since the Campaign began, realized Planned Gifts have contributed more than \$50 million to the University
- ▼ Of donors whose Planned Gifts have been realized during the Campaign, almost 60% had given to McGill for more than 15 years previously
- ▼ Since the Campaign began, more than 662 Planned Giving commitments have been made, representing approximately \$70.4 million in future income



# Alumni Relations

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**A**s in previous years, our objective for FY11 was to increase the strength and breadth of our alumni engagement programs, deepening the affinity of our existing friends and supporters while bringing new constituencies into the fold. We placed a special emphasis on engaging younger alumni, both through continued promotion of our social media platforms, and through events, such as networking opportunities, targeted to new graduates. Following the comprehensive alumni survey completed in FY10, we have analyzed the results and implemented an action plan that will extend through FY12.

## Alumni Relations Highlights

### Alumni Survey

In 2010, we conducted a comprehensive online survey of McGill's alumni. About 9,000 alumni were invited to participate in the email survey and 1,801 took part, representing an excellent a response rate of approximately 18%.

- ▼ 90% of alumni say they are satisfied overall with the experience they had as students at McGill
- ▼ 86% have positive overall feelings about the University today
- ▼ 93% of alumni take pride in their McGill degree
- ▼ 77% feel McGill values its alumni

### Student Send-offs

- ▼ 45 Student Send-Offs were held around the world, with 10 new regions added this year
- ▼ More than 800 students and 900 parents attended
- ▼ For the first time, new graduate students were invited to attend the events.
- ▼ 215 students and 76 parents volunteered at the events, along with 85 alumni volunteers
- ▼ Feedback from the Send-Offs was very positive: 79.3% of students attending gave them a very positive rating, as did 89% of the parents

### Homecoming and Parents' Weekend

- ▼ 3,070 alumni attended Homecoming, making the second year in a row that numbers were down. 773 parents and family members attended Parents Weekend
- ▼ For the first time, 15 student associations of SSMU partnered with the MAA and held a reception on Saturday afternoon on the lower section of McTavish Street
- ▼ The 13 Classes Without Quizzes sessions held across both campuses attracted 916 registrants
- ▼ Muhammad Yunus delivered an inspiring address as the 2010 Beatty Memorial Lecturer

## Honouring extraordinary international alumni



**I**n January 2011, Dr. Milton K. H. Leong, BSc'66, MDCM'70, DSc'00, was the recipient of the first ever Robert Fung International Award of Distinction, Presented by the McGill Alumni Association in memory of a passionate McGill supporter – the late Dr. Robert H.P. Fung, MDCM'60 – this new award honours an individual living outside North America who has enhanced McGill's reputation through a lifetime of exceptional leadership and service.

Dr. Leong's dedication to McGill began as a student and extended through his distinguished career as a physician. Along with

his outstanding volunteerism in service to the McGill Society of Hong Kong, Dr. Leong's financial support to McGill has ranged from faculty chairs to graduate fellowships which encourage China-Canada exchanges.

The award was presented at a special ceremony in Hong Kong, and provided an opportunity to recognize not just Dr. Leong, but the thousands of alumni worldwide who work tirelessly on McGill's behalf as volunteers, ambassadors and donors. ▀



# Communications

**I**n order to engage our alumni and support our fundraising efforts, we have developed a wide range of vehicles to communicate with our friends, graduates and supporters through a variety of platforms, including print, electronic communications and innovative social media. Our exceptional communications and advancement vehicles continue to be recognized nationally: McGill won 10 Prix d'Excellence Awards from the Canadian Council for the Support of Education—the highest number in the country.

- ▼ The electronic version of our alumni newsletter the McGill News, launched in FY10, continues to increase in traffic. Two to three new articles a month are posted to the site, offering an alternative to those who are not on the mailing list or who have indicated a preference for receiving an electronic version
- ▼ Monthly electronic regional newsletters are sent to parents and alumni in key areas
- ▼ We continue to maintain a very active presence in social media channels, in particular Facebook, Twitter and LinkedIn. Facebook “likes” went from about 3,000 to nearly 4,500 in the last year, Twitter followers have climbed rapidly, to more than 1,500, and membership in our alumni LinkedIn group has increased to more than 10,500
- ▼ The Parents Newsletter is now an electronic publication only, primarily as a cost-saving measure. The last print edition of the newsletter was awarded a gold medal from the CCAE
- ▼ The Alumni Online Community (AOC) is now available for the first time in both official languages. This is an important tool to reach our growing francophone base of alumni and parents

## Making an impact around the world

- ▼ McGill's events and publications won 10 Prix d'Excellence Awards from the Canadian Council for the Support of Education – the highest number in the country.
- ▼ 90% of alumni say they are satisfied overall with the experience they had as students at McGill, 86% have positive overall feelings about the University today, 93% take pride in their McGill degree, and 77% feel McGill values its alumni
- ▼ Nearly 60,000 votes were received in the Greatest McGillians contest
- ▼ More than 4,500 Facebook “likes” were logged in FY11, more than 1,500 people follow us on Twitter, and more than 10,500 alumni are members of our LinkedIn group

Greatest

# McGillians

**W**illiam Shatner, recipient of an Honorary Doctorate at the Fall 2011 Convocation, was one of 20 finalists in the Greatest McGillians contest, launched in February 2011. More than 60,000 online votes were received in this wildly popular initiative, which was designed to highlight the accomplishments of McGill's graduates, faculty, supporters and friends on the occasion of the University's 190th anniversary. The winners were announced mid-September and celebrated at a special Homecoming brunch in October, attended by contest winner Dr. Thomas Chang. ▼



# Volunteer and Constituent Engagement

**A** significant objective for FY11 was to create a more robust volunteer management structure, and to increase the involvement of volunteers at every level of the organization. Under the direction of the newly hired Managing Director, Volunteer Partnerships, we created a comprehensive volunteer engagement plan and began phase I of its implantation. We also continued to encourage fundraisers and Deans to engage volunteers at every stage of their fundraising activities, while nurturing and expanding our robust networks of regional volunteers. In addition to volunteer engagement, we continued to expand our stewardship activities, ensuring that existing and new Campaign donors are engaged beyond the life of their gifts and past the conclusion of the Campaign.

## Volunteer engagement

In FY11 we:

- Completed a volunteer study aimed at establishing the strengths, challenges and directions of our volunteer programs
- Created a comprehensive Volunteer Engagement Plan addressing all levels of McGill's organization
- Implemented fundraiser metrics that track and reward volunteer involvement
- Held a follow-up to the Leadership Summit of 2009: "Volunteer Retreat 2.0." This brought 50 top volunteers to McGill for an afternoon conference designed to inform and re-engage them with McGill
- Worked with Deans to revitalize Faculty Advisory Boards

- Worked with the MAA to create the Robert Fung International Award of Distinction, created to recognize an outstanding international volunteer. The first award was given to Dr. Milton Leong in Hong Kong in 2011

- Continued to expand the International Alma Mater Fund Council (IAMFC). Fourteen regional co-chairs and 85 members were enlisted to recruit volunteers in key areas to assist with this special initiative. Over 600 personal asks were extended to alumni in FY11 inviting them to join the Campaign at the \$750 and above level. There are currently active committees in the following key McGill markets: Montreal, Toronto, Ottawa, Calgary, Edmonton, Vancouver, New York, and Boston

## Stewardship and constituent engagement

We have built and continue to refine a donor stewardship and recognition system that ensures that donors are continuously informed of the ongoing impact of their philanthropy. In addition to baseline stewardship at both the annual and major gift level, including acknowledgement letters, thank you calls, newsletters, and student award recipient letters, a customized stewardship program is in place for our top donors. Customized stewardship encompasses gift recognition and ongoing relationship management in an effort to engage donors, not just in the life of their gift, but also in the life of the University. In order to maintain and grow these programs Donor Relations and Stewardship has and continues to build infrastructure and systems to track and document stewardship actions. A comprehensive Constituent Engagement Plan is also being developed to ensure that friends, supporters, donors, prospects and alumni are optimally nurtured at every stage of their relationship with McGill. ▀






## Celebrating our greatest asset: Volunteer Retreat 2.0

**B**uilding on the success of the first Leadership Summit for key volunteers in 2009 – an event recognized last year with a gold medal by the Canadian Council for the Advancement of Education (CCAEE) – a second “Volunteer Retreat 2.0” was held in September 2010.

The gathering brought together 50 volunteer leaders for an afternoon conference to re-engage them and provide them with the tools they need in their work going forward for Campaign McGill.

The event focused on Graduate Studies and Research, and included a plenary session followed by “speed research,” sessions where six professors spoke about their research. They were given eight minutes with each group and then had to switch until all groups had heard from them.

“Inside McGill,” the final session of the afternoon, provided volunteers with an inside view of Research and Innovation and McGill’s Funding Model. The conference finished with a reception at the Faculty Club, where participants heard from the Principal and special guest, Nobel Peace Prize winner Muhammad Yunus. ▼



# Creating a robust fundraising architecture

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## Quick Facts

- ▶ The value of McGill's prospect pool now exceeds \$1 billion
- ▶ The number of new prospects qualified in FY11 was double that in FY10
- ▶ Compared with peer institutions, McGill's advancement operation is under-resourced at the Faculty level, yet our revenues per dollar spent are among the best in the country
- ▶ Our fundraisers generate an average of more than \$1.5 million each: more than those at UBC and the University of Alberta, and just slightly less than those at U of T

**F**Y11 saw DAR continue to refine our structures and practices in order to optimize efficiency, increase revenues and build a robust pipeline for future giving. Over the last five years, we have progressively worked to professionalize and operations at DAR, creating a structure that is in line with the best-performing institutions in North America and which has the capacity to produce the results McGill requires to remain competitive.

Having achieved this level of maturity, our efforts in FY11 involved consolidating our operations, and focusing on strategies that will generate the most revenue from our current pools while ensuring a steady pipeline of future gifts. A key element of this planning has been our work with the SRI, where we focused our attention on comprehensively benchmarking our staffing and performance against Canadian and American peers, improving the efficiency of our front-line fundraisers, and managing our workforce to generate optimal results. Detailed plans are being developed and implemented in these areas, and will continue to evolve with the SRI in FY12.

### Improving fundraiser productivity and workforce planning

Following a comprehensive benchmarking exercise with GG+A undertaken as part of the SRI, it became clear that we are notably under-resourced compared with our peers. Despite this, our revenues-per-dollar-spent are among the best in class. This analysis also made clear that we should be deploying our existing resources, along with any new ones, to our Faculties, decentralizing our operations to some extent. It also revealed the merits of

a “development associates” program, through which fundraisers are supported by associates who assist with non-fundraising tasks, while training to become the next generation of major gifts fundraisers. Through the two SRI projects focused on increasing fundraiser productivity and workforce planning, we are working to address these issues and will continue this process in tandem with the SRI through FY12. Activities and achievements in these areas include:

- Completing a comprehensive peer benchmarking study, indicating our paucity of front-line fundraisers compared with our peers, and providing guidance for where future hiring should be directed
- Increasing faculty-based fundraising cohort by moving staff from central positions, and redeploying staff from centrally-based non-fundraising roles. In FY11, three Martlet staff members were promoted to fundraising roles in the Faculties from professional support positions, and four Martlet fundraisers were redeployed to the Faculties
- Refining metrics and enhancing focus on face-to-face contacts. Face-to-face contacts increased by more than 300 per cent in FY11, from 146 to 477
- Providing mentoring and other talent management services designed to support and retain top fundraisers. In FY11 we held a town hall for all DAR employees (Martlet- and Faculty-based) to address job satisfaction and other issues. This was followed by a comprehensive employee survey, which achieved 80% participation and provided illuminating information on issues of primary concern to employees. We are developing and implementing a strategic plan to address the issues most tied to employee satisfaction and retention, and will roll this out over the coming year



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## Campaign planning

In order to achieve the greatest success in the next phases of the Campaign, we created and began to implement a tactical plan to extract the maximum revenues from our existing pools. Analysis is complete and prospects are now being deployed to our Major and Annual Fund fundraisers.

## Strengthening our gift pipeline and expanding prospect pools

FY11 saw a consolidation of the restructuring of the Prospecting and Pipeline Management Unit begun in FY10. The result has been both a much more accurate sense of the considerable potential of our prospect pool, more consistent reporting both within DAR and to Deans and Faculties, and a more successful and consistent deployment of high quality

prospects to our fundraisers. Activities and results included:

- Engaging in a comprehensive wealth and affinity screening and modelling exercise of our current prospect pools, revealing substantial untapped potential in both the Canadian and American markets (the international pool is to follow)
- Increasing the total value of our prospect pool, which reached the \$1-billion mark for the first time at the end of FY11
- Doubling the number of qualifications completed compared with FY10, with half of these completed by the Qualifications Unit
- Adding hundreds of new, high-quality prospects to the Major Gifts pool
- Supporting a prospect-management plan aimed at optimizing the potential of our current pool through targeted high-end Annual asks ▼



A blue-tinted photograph of a library interior. Tall bookshelves filled with books line the walls. In the background, a person is seated at a table, reading. The overall atmosphere is quiet and scholarly.

## Taking the long view

**F**undraising at McGill is about more than just campaigns: it is about building a solid, sustainable future for our students, faculty and the communities around the world who benefit from our extraordinary teaching, research and outreach.

To do this, we are reaching far beyond the walls of Martlet House: engaging our alumni, deepening our connections with our volunteers and working with our colleagues across the University to build a true culture of philanthropy that penetrates every level of the institution.

More than ever, McGill relies on philanthropy to help us keep pace with our peers and maintain the standard of excellence for which we are renowned. In order to do this, philanthropy must become a cornerstone of everything we do. This will require commitment and investment, both financial and human. But, as our generous supporters demonstrate year after year, the rewards are truly beyond measure. ▴



# Appendix I:

## Report on Private Giving

| TABLE IA PRIVATE FUNDING BY SOURCE |                     |             |                     |             |
|------------------------------------|---------------------|-------------|---------------------|-------------|
| SOURCE                             | 2010-2011           | % OF TOTAL  | 2009-2010           | % OF TOTAL  |
| Alumni                             | \$18,273,974        | 30.3%       | \$19,092,941        | 27.4%       |
| Corporations                       | \$18,196,813        | 30.2%       | \$27,494,318        | 39.5%       |
| Foundations                        | \$16,051,597        | 26.6%       | \$13,790,589        | 19.8%       |
| Friends                            | \$2,837,337         | 4.7%        | \$5,242,065         | 7.5%        |
| Parents                            | \$1,986,333         | 3.3%        | \$711,962           | 1.0%        |
| Associations & Other 1             | \$1,393,306         | 2.3%        | \$1,146,147         | 1.6%        |
| Student                            | \$847,333           | 1.4%        | \$1,183,127         | 1.7%        |
| Faculty & Staff 2                  | \$681,741           | 1.1%        | \$920,291           | 1.3%        |
| <b>TOTAL</b>                       | <b>\$60,268,434</b> | <b>100%</b> | <b>\$69,581,440</b> | <b>100%</b> |

| TABLE IB PRIVATE FUNDING BY SOURCE (BY PRIMARY SOFT CREDIT)* |                     |             |                     |             |
|--|---------------------|-------------|---------------------|-------------|
| SOURCE   | 2010-2011           | % OF TOTAL  | 2009-2010           | % OF TOTAL  |
| Alumni   | \$33,263,834        | 55.2%       | \$32,765,775        | 47.1%       |
| Corporations   | \$7,946,736         | 13.2%       | \$12,302,392        | 17.7%       |
| Foundations  | \$7,903,202         | 13.1%       | \$10,709,804        | 15.4%       |
| Friends  | \$7,257,798         | 12.0%       | \$9,939,600         | 14.3%       |
| Parents  | \$1,432,836         | 2.4%        | \$948,882           | 1.4%        |
| Associations & Other   | \$934,442           | 1.6%        | \$961,647           | 1.4%        |
| Student  | \$846,983           | 1.4%        | \$1,182,807         | 1.7%        |
| Faculty & Staff  | \$682,603           | 1.1%        | \$770,533           | 1.1%        |
| <b>TOTAL</b>   | <b>\$60,268,434</b> | <b>100%</b> | <b>\$69,581,440</b> | <b>100%</b> |

### NOTES

#### Table IA and IB

1. Associations & Other: Prior to FY2006, DAR recorded and reported grants from Organizations (e.g. Cancer Research Society, Muscular Dystrophy etc.) since they represented overall support of the University's teaching and research initiatives and for many years such funding was the result of the efforts of DAR staff to secure such funding. This amount has typically been in the range of approximately \$10M - \$11M. Given that these types of contributions fall under the policy of research grants, since FY2006 these grants have no longer been recorded as private support and therefore will not be included in any reports on private giving to the University. Also, prior to FY2006, provincial matching funds (on donations) totaled roughly \$1 million annually. As of FY2006 these revenues will no longer be recorded by DAR and therefore will not be included on any reports.

2. Faculty & Staff: The numbers shown represent donations made by individuals whose primary record type is Faculty/Staff and who are not alumni, parents or friends. The amounts donated by those who were both alumni (or parents, or friends) and Faculty/Staff were \$2,607,451 in FY2011 and \$2,247,513 in FY2010. Consequently, the total amount donated by Faculty/Staff regardless of other record types was \$3,289,192 in FY2011 and \$3,167,804 in FY2010.

**TABLE II PRIVATE FUNDING BY PURPOSE**

| PURPOSE                                  | 2010-2011           | % OF TOTAL  | 2009-2010           | % OF TOTAL  |
|--|---------------------|-------------|---------------------|-------------|
| Other (Program Support)                  | \$13,303,721        | 22.1%       | \$13,188,457        | 19.0%       |
| Fellowship                               | \$7,674,636         | 12.7%       | \$9,344,119         | 13.4%       |
| Research 3                               | \$7,076,221         | 11.7%       | \$4,512,308         | 6.5%        |
| Chairs                                   | \$6,048,726         | 10.0%       | \$10,327,634        | 14.8%       |
| Unrestricted 4                           | \$5,629,087         | 9.3%        | \$5,914,037         | 8.5%        |
| Construction/Renovations                 | \$3,963,648         | 6.6%        | \$3,808,614         | 5.5%        |
| Prize/Activity Award/Medal               | \$3,275,699         | 5.4%        | \$2,794,355         | 4.0%        |
| Pending 5                                | \$3,165,793         | 5.3%        | \$3,134,131         | 4.5%        |
| Scholarship                              | \$2,174,483         | 3.6%        | \$5,054,801         | 7.3%        |
| Bursary                                  | \$1,366,169         | 2.3%        | \$2,672,528         | 3.8%        |
| Equipment                                | \$1,335,343         | 2.2%        | \$1,241,566         | 1.8%        |
| Books/Collections                        | \$1,062,417         | 1.8%        | \$952,236           | 1.4%        |
| Teaching                                 | \$982,760           | 1.6%        | \$1,155,539         | 1.7%        |
| Exhibitions                              | \$821,627           | 1.4%        | \$588,376           | 0.8%        |
| Student Activities                       | \$687,803           | 1.1%        | \$575,095           | 0.8%        |
| Conference                               | \$511,883           | 0.8%        | \$250,402           | 0.4%        |
| Professorship/Visiting Professor/Scholar | \$468,072           | 0.8%        | \$3,369,201         | 4.8%        |
| Non UCSSA Award                          | \$387,076           | 0.6%        | \$281,023           | 0.4%        |
| Lectureship                              | \$216,373           | 0.4%        | \$325,412           | 0.5%        |
| Athletic Award                           | \$116,900           | 0.2%        | \$91,607            | 0.1%        |
| <b>TOTAL</b>                             | <b>\$60,268,434</b> | <b>100%</b> | <b>\$69,581,440</b> | <b>100%</b> |

**TABLE III PRIVATE FUNDING BY PROGRAM**

| PROGRAM                  | 2010-2011           | % OF TOTAL  | 2009-2010           | % OF TOTAL  |
|--------------------------|---------------------|-------------|---------------------|-------------|
| Major Gifts              | \$43,868,996        | 72.8%       | \$52,308,182        | 75.2%       |
| Annual Fund              | \$9,922,900         | 16.5%       | \$9,365,439         | 13.5%       |
| Bequests & Planned Gifts | \$4,932,107         | 8.2%        | \$6,817,964         | 9.8%        |
| Other 6                  | \$1,544,431         | 2.6%        | \$1,089,855         | 1.6%        |
| <b>TOTAL</b>             | <b>\$60,268,434</b> | <b>100%</b> | <b>\$69,581,440</b> | <b>100%</b> |

**TABLE IVA PRIVATE FUNDING BY REGION**

| REGION        | 2010-2011           | % OF TOTAL  | 2009-2010           | % OF TOTAL  |
|---------------|---------------------|-------------|---------------------|-------------|
| Quebec        | \$32,130,182        | 53.3%       | \$41,286,824        | 59.3%       |
| Ontario       | \$12,013,523        | 19.9%       | \$13,281,526        | 19.1%       |
| U. S. A.      | \$8,079,608         | 13.4%       | \$5,972,701         | 8.6%        |
| Canada Other  | \$5,385,720         | 8.9%        | \$6,489,581         | 9.3%        |
| International | \$2,659,401         | 4.4%        | \$2,550,808         | 3.7%        |
| <b>TOTAL</b>  | <b>\$60,268,434</b> | <b>100%</b> | <b>\$69,581,440</b> | <b>100%</b> |

**Table II**

3. Research: Gifts in this category do not involve contracts or deliverables.

4. Unrestricted: Gifts free of restriction, that can be applied to McGill's greatest needs.

5. Pending: Includes gifts pending designation with respect to donor wishes.

**Table III**

6. Other: Represents donations from fundraising events and institutions.

| TABLE IVB PRIVATE FUNDING BY REGION (BY PRIMARY SOFT CREDIT)* |                     |             |                     |             |
|---|---------------------|-------------|---------------------|-------------|
| REGION  | 2010-2011           | % OF TOTAL  | 2009-2010           | % OF TOTAL  |
| Quebec  | \$33,374,165        | 55.4%       | \$41,543,367        | 59.7%       |
| Ontario   | \$11,817,897        | 19.6%       | \$12,728,494        | 18.3%       |
| U. S. A.  | \$8,067,541         | 13.4%       | \$6,056,955         | 8.7%        |
| Canada Other  | \$4,293,247         | 7.1%        | \$6,404,801         | 9.2%        |
| International   | \$2,715,585         | 4.5%        | \$2,847,823         | 4.1%        |
| <b>TOTAL</b>  | <b>\$60,268,434</b> | <b>100%</b> | <b>\$69,581,440</b> | <b>100%</b> |

| TABLE V PRIVATE FUNDING BY RECIPIENT UNIT |                     |             |              |                     |             |
|---|---------------------|-------------|--------------|---------------------|-------------|
| UNIT                                      | 2010-2011           | % OF TOTAL  | STUDENT BODY | 2009-2010           | % OF TOTAL  |
| Medicine                                  | \$13,749,434        | 22.8%       | 13.3%        | \$13,195,032        | 19.0%       |
| University-Wide 7                         | \$9,374,341         | 15.6%       | N/A          | \$12,195,178        | 17.5%       |
| Management                                | \$6,552,879         | 10.9%       | 7.7%         | \$5,309,874         | 7.6%        |
| Engineering                               | \$5,368,291         | 8.9%        | 10.9%        | \$5,783,800         | 8.3%        |
| MNI                                       | \$5,125,871         | 8.5%        | N/A          | \$5,677,664         | 8.2%        |
| Arts                                      | \$4,708,963         | 7.8%        | 22.7%        | \$6,661,705         | 9.6%        |
| Law                                       | \$2,974,814         | 4.9%        | 2.2%         | \$3,555,430         | 5.1%        |
| Science                                   | \$2,784,096         | 4.6%        | 15.4%        | \$8,528,602         | 12.3%       |
| Agric & Env Sci                           | \$2,486,962         | 4.1%        | 4.9%         | \$1,387,689         | 2.0%        |
| Music                                     | \$1,653,475         | 2.7%        | 2.3%         | \$1,961,585         | 2.8%        |
| Libraries                                 | \$1,564,388         | 2.6%        | N/A          | \$1,780,752         | 2.6%        |
| Dentistry                                 | \$1,011,521         | 1.7%        | 0.6%         | \$724,792           | 1.0%        |
| Education                                 | \$874,676           | 1.5%        | 7.3%         | \$1,033,763         | 1.5%        |
| Athletics                                 | \$750,082           | 1.2%        | N/A          | \$863,878           | 1.2%        |
| Hospitals.Museums                         | \$741,453           | 1.2%        | N/A          | \$626,941           | 0.9%        |
| Religious Studies                         | \$421,107           | 0.7%        | 0.3%         | \$217,642           | 0.3%        |
| Continuing Education                      | \$126,082           | 0.2%        | 12.4%        | \$77,114            | 0.1%        |
| <b>TOTAL</b>                              | <b>\$60,268,434</b> | <b>100%</b> | <b>100%</b>  | <b>\$69,581,440</b> | <b>100%</b> |

**Table V**

7. University-Wide: Gifts that are not designated to a specific unit and are attributed to core purposes.

**\* Primary Soft Credit**

Primary Soft Credit refers to a way of totaling gifts that recognizes the individuals primarily responsible for bringing donations to McGill.

**Adjustments**

In order to present more accurately the cash collected from Foundations, Students and Friends, some donations were reclassified. Comparative figures were adjusted accordingly.

\*The University has changed its fiscal year end from May 31st to April 30th. This modification is effective for subsequent periods ending after May 31st 2010. Fiscal year 2010-2011 will thus cover 11 months and will present two months of activity (June and July 2010) in the first quarter of the year.



McGill

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