



# Memorandum

Office of the Vice Principal (UA)  
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**TO:** Senate

**FROM:** Mr. Marc Weinstein, Vice-Principal (University Advancement)

**SUBJECT:** University Advancement Annual Report (2013-2014)

**DATE:** January 21, 2015

**DOCUMENT #:** D14-34

**ACTION REQUIRED:**  INFORMATION  APPROVAL/DECISION

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**ISSUE:** The University Advancement Annual Report (2013-2014) provides an overview of philanthropic results and activities.

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**BACKGROUND & RATIONALE:** The presentation provides a brief overview and analysis of philanthropic results for FY2014, and a look ahead at University Advancement's short- and mid-term strategic objectives.

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**MOTION OR RESOLUTION FOR APPROVAL:** N/A

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**PRIOR CONSULTATION:** Senior Administration  
Presentation to the Finance Committee of the Board of Governors

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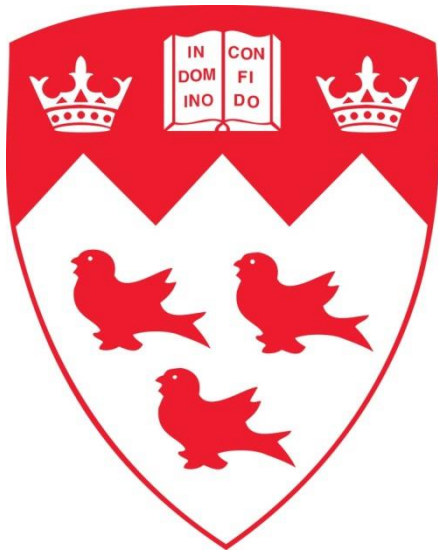
**NEXT STEPS:** Submission to the Board of Governors on February 2, 2015 for information.

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**APPENDICES:** Appendix A: University Advancement Annual Report (2013-2014)  
Appendix B: McGill's FY2014 Report on Private Giving

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# **BUILDING A ROBUST PHILANTHROPIC FUTURE**

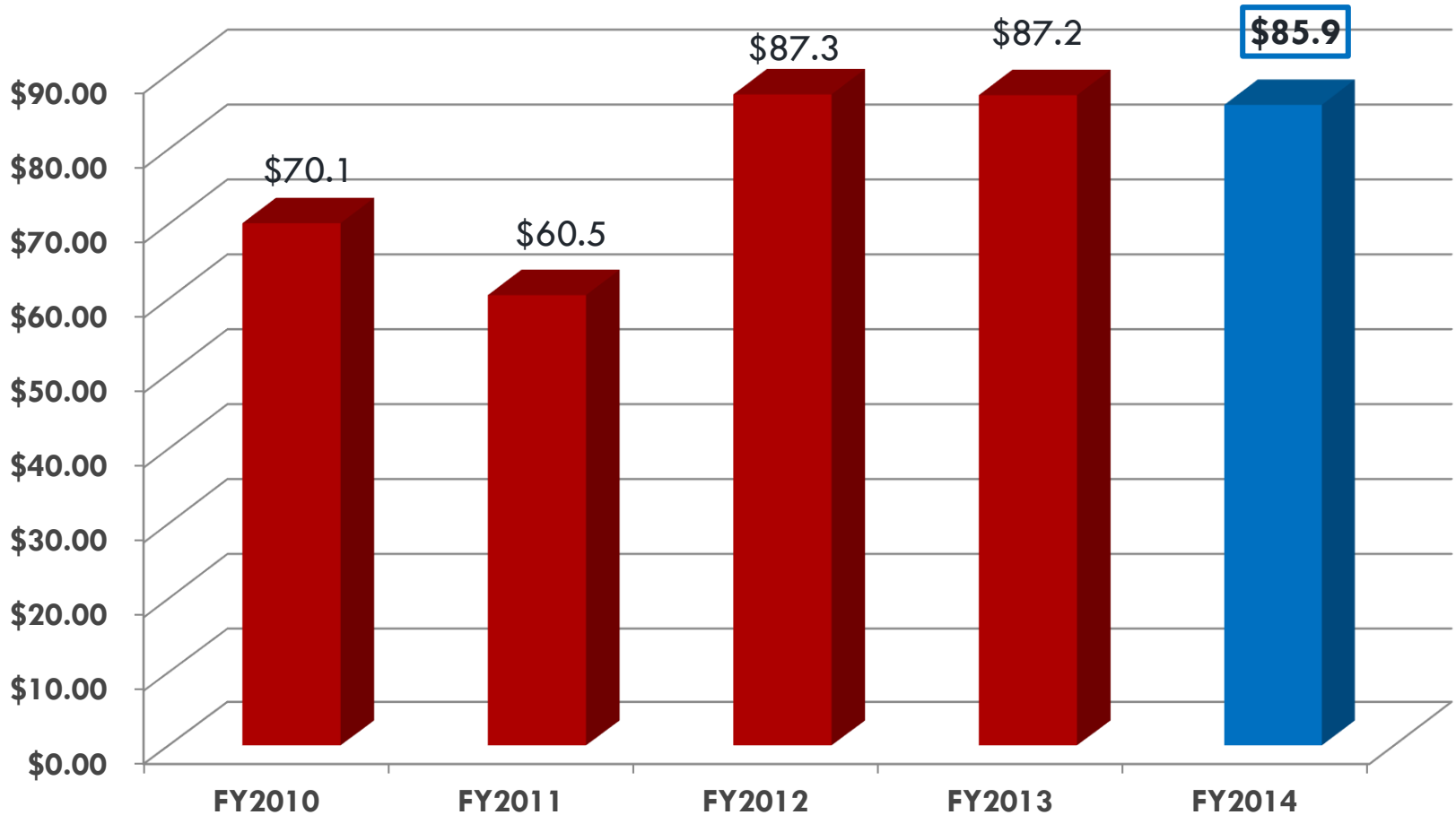
***A PRESENTATION TO SENATE  
BY MARC WEINSTEIN  
VICE-PRINCIPAL, UNIVERSITY ADVANCEMENT***



# I: FY14 FINANCIAL RESULTS

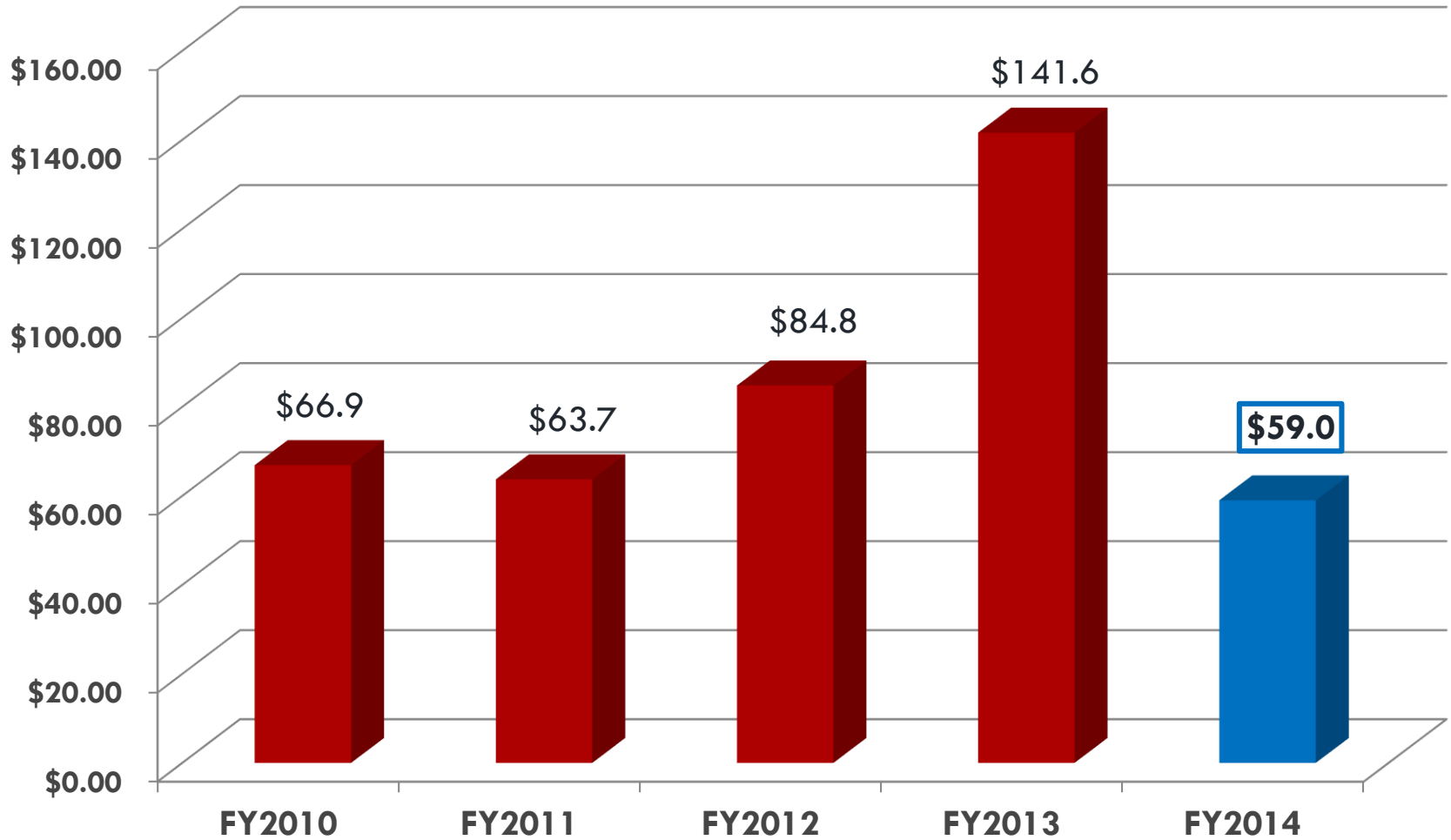


# CASH (IN MILLIONS)



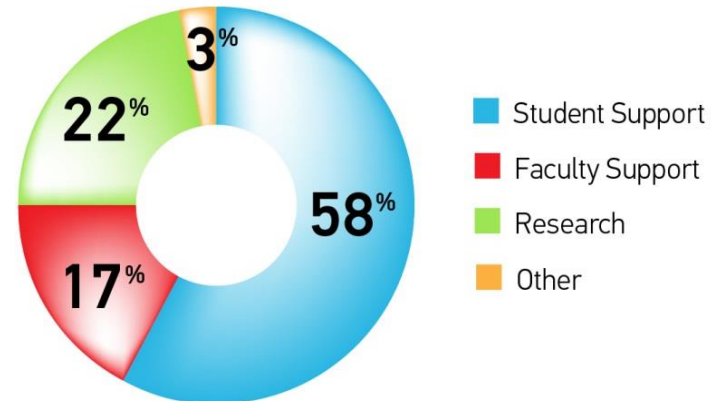
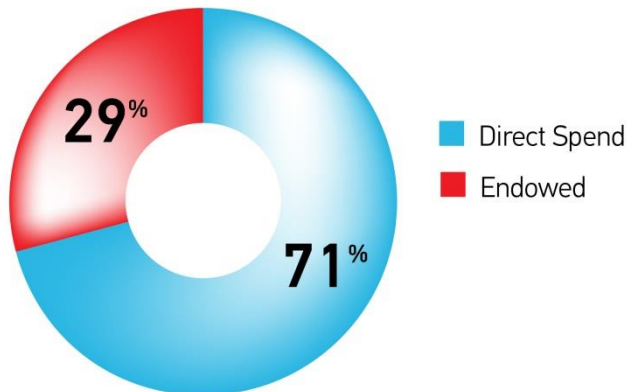
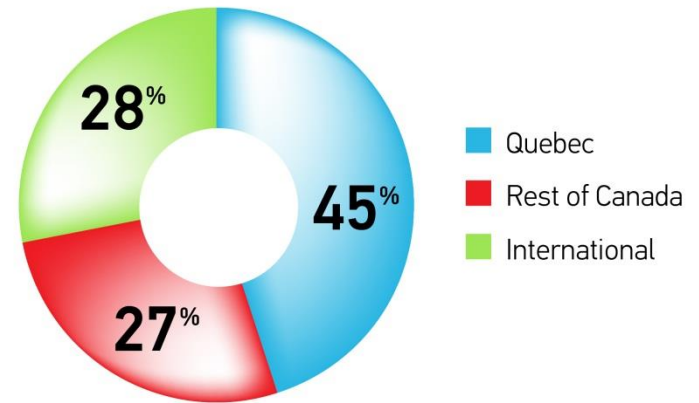
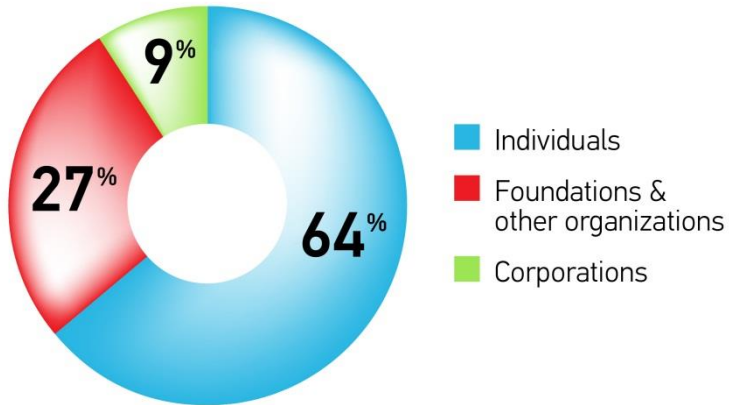


# ACHIEVEMENTS (IN MILLIONS)





# FURTHER ANALYSIS: FY14 GIVING





## II: BUILDING FOR THE FUTURE



# FY15-FY17 Strategic Planning Process

- Beginning in May 2014, we engaged in a comprehensive strategic planning process aimed at:
  - Ensuring full integration of our Development and Alumni Relations missions (reflected in our new name)
  - Identifying our key priorities, and developing the tactics and strategies to get us there
  - Making sure we are in the strongest possible position to rally our community around McGill's bicentennial



# FY15-FY17 Strategic Planning Process

## ▣ **Six overarching objectives:**

- Raise \$100M in cash per year
- Increase number of \$5M+ donations
- Ensure alumni are fully integrated partners in McGill's mission
- Complete 200<sup>th</sup> anniversary planning
- Build one Advancement team around common values
- Strengthen engagement with students and young alumni

## □ Two key performance indicators

1. Revenues from donations and fundraising activities
2. Annual number of individuals and organizations who engage meaningfully with McGill by:
  - ✓ Making a gift
  - ✓ Participating in an engagement activity
  - ✓ Updating their contact information (address, email, phone number)
  - ✓ Engaging in a substantive contact with a McGill staff member or volunteer
  - ✓ Engaging in a volunteer activity
  - ✓ Clicking through on an Advancement-generated email



# Top priorities

- ▣ On the fundraising side:
  - Focusing on Primary Gifts
  - Strengthening donor stewardship
  - Enriching our volunteer cohort
  - Generating support for the McGill Commitment and other key priorities



# Top priorities

- ▣ On the engagement side:
  - Building new digital platforms to engage all alumni, particularly younger cohorts
  - Working with student leaders to develop new programs to connect alumni with students
  - Finding new ways for alumni to support McGill, such as recruitment and yield activities
  - Our new crowdfunding site: Seeds of Change



# Seeds of Change

McGill Seeds of Change

OPEN PROJECTS FUNDED PROJECTS ABOUT CONTACT

**Elimu Community Library Online Tutoring Program**  
 Together with the Elimu Community Library in Kenya, McGill students would like to establish an online tutoring program for Kenyan high school students. This program will allow both Kenyan and McGill students to gain exposure to new people and environments.

Seeding is Believing. Finding new ways to do good.

We're about small grassroots initiatives, often run by McGill students, that directly improve the lives of people. These are also some of the smartest, coolest and most innovative projects around. So get ready to be impressed and moved - and get ready to give to the cause that speaks to you.

Because even the most amazing project needs your help

- 1** Pick a cause. (or three)
- 2** Give a little. (your time, your voice, your money)
- 3** Change a life. (and get yourself on the back for helping)

**Featured projects**

**Michael Soles Football Award**  
 Honour Michael Soles' career and commendable dedication to McGill both on and off the field by helping us establish an endowment fund in his name to create the Michael Soles Football Award.

**McGill's Varsity Swimming**  
 Help McGill's Varsity Swim program find its rightful place in the school's history by becoming the most successful team in the program's 105 year existence.

**Sustainability Internship Project**  
 Help sustainability at McGill grow by funding a life-changing internship opportunity for a student with the McGill Office of Sustainability.

**Peer Support Network**  
 With your partnership, the PSN team is ready and willing to continue their mission to care for students in need, and have capped their funding goal to meet the huge impounding of support.

What started as a class project proposed by three McGill students has blossomed into a complete plan to help rebuild the business sector of Lac-Mégantic in partnership with local leaders.

**SEE ALL OPEN PROJECTS**

McGill Seeds of Change is an initiative of McGill University, changing the world one donation at a time and creating a virtual community of people connected through philanthropy.

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- \$260,000 raised
- More than **900** gifts to date
- **10** projects completely funded
- Almost **50%** of donors to the platform have never given to McGill before



# Final thoughts

- We have spent a lot of energy over the last year working to become the most effective Advancement unit we can be
- This is more critical than ever when we know that our ambitions far exceed our operating budget
- BUT: we can't— and shouldn't— operate in isolation
- **We need your full partnership** to help us reach our goals





# Final thoughts

## □ **How can we work together?**

- Collaborate with us to help involve your colleagues and peers in philanthropy
- Embrace opportunities to share your enthusiasm with alumni and donors
- Help us understand your needs and priorities, and develop exciting projects to engage our donors
- Tell us your success stories: we want to spread the word about what our amazing students, faculty and staff members are doing to improve their communities



# And remember...

## The clock is ticking!

T-minus **2,172 days** until January 1<sup>st</sup>, 2021

**52,128** hours

**3,127,680** minutes

**187,660,800** seconds...





Questions? Comments?



**Table Ia Private Funding by Source**

<b>Source</b>	<b>2013-2014</b>	<b>% of Total</b>	<b>2012-2013</b>	<b>% of Total</b>
Foundations	\$38,250,008	44.5%	\$37,503,614	43.0%
Alumni	\$20,652,606	24.0%	\$25,237,938	28.9%
Corporations	\$15,137,873	17.6%	\$14,624,521	16.8%
Friends	\$5,171,193	6.0%	\$4,941,569	5.7%
Associations & Other <sup>1</sup>	\$4,251,498	4.9%	\$1,394,138	1.6%
Student	\$1,142,897	1.3%	\$1,261,484	1.4%
Parents	\$909,352	1.1%	\$1,132,839	1.3%
Faculty & Staff <sup>2</sup>	\$399,978	0.5%	\$1,101,922	1.3%
<b>Total</b>	<b><u>\$85,915,404</u></b>	<b><u>100%</u></b>	<b><u>\$87,198,025</u></b>	<b><u>100%</u></b>

**Table Ib Private Funding by Source (by Soft Credit) \***

<b>Source</b>	<b>2013-2014</b>	<b>% of Total</b>	<b>2012-2013</b>	<b>% of Total</b>
Alumni	\$44,941,272	52.3%	\$42,145,439	48.3%
Foundations	\$16,966,142	19.7%	\$24,564,765	28.2%
Friends	\$10,233,987	11.9%	\$8,717,910	10.0%
Corporations	\$6,931,421	8.1%	\$6,865,508	7.9%
Associations & Other	\$3,966,104	4.6%	\$1,127,278	1.3%
Parents	\$1,222,296	1.4%	\$1,424,616	1.6%
Student	\$1,142,897	1.3%	\$1,261,484	1.4%
Faculty & Staff	\$511,286	0.6%	\$1,091,027	1.3%
<b>Total</b>	<b><u>\$85,915,404</u></b>	<b><u>100%</u></b>	<b><u>\$87,198,025</u></b>	<b><u>100%</u></b>

## Report on Private Giving FY2014

Summarized from official results at the close of fiscal years

### Table II Private Funding by Program

Program	2013-2014	% of Total	2012-2013	% of Total
Major Gifts	\$66,300,713	77.2%	\$65,541,141	75.2%
Annual Fund	\$10,881,806	12.7%	\$10,564,049	12.1%
Bequests & Planned Gifts	\$7,106,893	8.3%	\$8,898,195	10.2%
Other <sup>3</sup>	\$1,625,993	1.9%	\$2,194,641	2.5%
<b>Total</b>	<b><u>\$85,915,404</u></b>	<b><u>100%</u></b>	<b><u>\$87,198,025</u></b>	<b><u>100%</u></b>

### Table IIIa Private Funding by Region

Region	2013-2014	% of Total	2012-2013	% of Total
Quebec	\$45,641,073	53.1%	\$42,842,406	49.1%
Ontario	\$20,266,753	23.6%	\$24,507,330	28.1%
U. S. A.	\$9,810,337	11.4%	\$7,911,397	9.1%
International	\$6,512,749	7.6%	\$7,507,308	8.6%
Canada Other	\$3,684,493	4.3%	\$4,429,585	5.1%
<b>Total</b>	<b><u>\$85,915,404</u></b>	<b><u>100%</u></b>	<b><u>\$87,198,025</u></b>	<b><u>100%</u></b>

### Table IIIb Private Funding by Region (by Soft Credit) \*

Region	2013-2014	% of Total	2012-2013	% of Total
Quebec	\$46,121,340	53.7%	\$43,360,698	49.7%
Ontario	\$18,538,277	21.6%	\$24,019,620	27.5%
U. S. A.	\$9,651,517	11.2%	\$7,864,819	9.0%
International	\$7,980,895	9.3%	\$7,578,176	8.7%
Canada Other	\$3,623,375	4.2%	\$4,374,713	5.0%
<b>Total</b>	<b><u>\$85,915,404</u></b>	<b><u>100%</u></b>	<b><u>\$87,198,025</u></b>	<b><u>100%</u></b>

## Report on Private Giving FY2014

Summarized from official results at the close of fiscal years

**Table IV Private Funding by Recipient Unit**

<b>Unit</b>	<b>2013-2014</b>	<b>% of Total</b>	<b>Student Body</b>	<b>2012-2013</b>	<b>% of Total</b>
Medicine	\$22,186,922	25.8%	13.9%	\$11,476,248	13.2%
University-Wide <sup>4</sup>	\$11,163,293	13.0%	N/A	\$23,854,551	27.4%
Engineering	\$10,769,530	12.5%	11.5%	\$11,938,844	13.7%
Arts	\$10,612,711	12.4%	22.3%	\$9,048,721	10.4%
Management	\$8,575,458	10.0%	7.6%	\$7,849,899	9.0%
Science	\$4,485,308	5.2%	15.2%	\$4,101,792	4.7%
MNI	\$4,420,390	5.1%	N/A	\$4,001,903	4.6%
Law	\$2,908,182	3.4%	2.2%	\$2,279,123	2.6%
Agric & Env Sci	\$2,048,337	2.4%	4.9%	\$2,371,944	2.7%
Dentistry	\$1,779,793	2.1%	0.6%	\$1,257,480	1.4%
Athletics	\$1,637,022	1.9%	N/A	\$1,862,331	2.1%
Music	\$1,524,454	1.8%	2.2%	\$2,042,043	2.3%
Libraries	\$1,429,805	1.7%	N/A	\$2,119,089	2.4%
Religious Studies	\$887,259	1.0%	0.3%	\$949,636	1.1%
Hospitals-Museums	\$720,607	0.8%	N/A	\$512,344	0.6%
Education	\$660,992	0.8%	7.5%	\$1,298,961	1.5%
Continuing Education	\$105,342	0.1%	11.8%	\$233,117	0.3%
<b>Total</b>	<b><u>\$85,915,404</u></b>	<b><u>100%</u></b>		<b><u>\$87,198,025</u></b>	<b><u>100%</u></b>

**Report on Private Giving FY2014**

Summarized from official results at the close of fiscal years

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**NOTES****Table Ia and Ib**

1. Associations & Other: This report does not include the cash received by Research and International Relations in support of research considered philanthropic in nature by the Council for Advancement and Support of Education Reporting Guidelines.  
Such donations amount to \$23,561,472 in FY2014 and \$21,977,410 in FY2013.
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 \$2,887,797 in FY2014 and \$2,389,174 in FY2013.  
Consequently, the total amount donated by Faculty/Staff regardless of other record types was \$3,287,775 in FY2014 and \$3,491,095 in FY2013.

**Table II**

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

**Table IV**

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

**\*Soft Credit**

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