

**2003-2004**

DIVISION OF  
UNIVERSITY  
ADVANCEMENT

**Annual Report**

to Business Board

*Report ON*

**the campaign**



UNIVERSITY OF TORONTO



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## INTRODUCTION

This year's report discusses in some depth the impact of the Campaign for the University of Toronto. In addition to reaching its milestone objective of \$1 billion in December 2003, one year ahead of schedule, the Campaign has strengthened the University of Toronto's profile and positioned the University for greater long term success in private sector resource generation.

As Appendix A to this report indicates, gifts and pledges to the Campaign totaled \$1,010,645,066 on December 31, 2003; more than \$900 million was already in hand by that date. Of the total raised, \$512,399,885 was designated for endowment while \$498,245,181 was in expendable donations.

The Campaign also surpassed the parallel goal to obtain a minimum of \$200 million in future gift intentions. The importance of this achievement cannot be underestimated in terms of the ability of U of T to benefit from realized bequests in future years.

In addition, the Campaign also attracted approximately \$397 million in government funding for Campaign priorities, resulting in a total net impact in excess of \$1.4 billion.

This report analyzes the Campaign from the following three perspectives:

- The degree to which the Campaign provided the private funding required to support the academic objectives outlined in the "Planning to 2000" and "Raising our Sights" academic plans.
- The degree to which the University's public profile and alumni relations have been strengthened through the infrastructure created for the Campaign and the programs executed during the Campaign period.
- The degree to which the Division of University Advancement has built the infrastructure, management systems, and donor base that will be necessary to attract the private support required for "Stepping Up".

It continues to be a great privilege for me and my colleagues to serve our University. The Campaign would not have been successful without the hard work and commitment in every sector of the University of Toronto, from the President and Vice Presidents, to the Principals and Deans, the faculty and staff, and the students, alumni, and friends.

The success of the Campaign demonstrates that the University of Toronto community can unite in an important cause and shows that there is terrific potential to achieve even greater success in the future.

Jon S. Dellandrea  
Vice President and Chief Advancement Officer

## BENCHMARKING THE CAMPAIGN

In the spring of 1995, senior Division of University Advancement (DUA) staff met to define the course for the upcoming University of Toronto Campaign. At the time, the preliminary working goal of the Campaign had been set at a minimum of \$300 million, triple the objective of the previous U of T Breakthrough Campaign, and \$100 million more than the \$200 million goal for the campaign at McGill University, then the largest in Canadian history. An early review of the fund raising capacity at the University of Toronto, circa 1995 revealed that:

- The list of prospective donors was not sufficient to assure the success of a campaign more ambitious than the \$300 million objective.
- There had been very little connection between the academic priorities of faculties and divisions and overall University of Toronto fund raising in the previous campaign.
- The University had not devoted significant effort to stewarding the Breakthrough Campaign's donors (at the time, many universities did not devote effort and resources to stewardship).

Mindful of the need both to maximize support for the academic priorities that were being defined by the "Planning for 2000" academic planning process, and to strengthen the University of Toronto's fund raising capacity on a long-term basis, the senior staff of DUA, in consultation with the President and Vice Presidents and the Principals and Deans, defined a series of objectives for how the Campaign should be evaluated in the future:

1. The Campaign goals and objectives were servant to the academic mission of the University.
2. The stakeholders in priority-setting were integral members of the Campaign team and included the President, Vice presidents, Principals and Deans, Chairs, faculty, students, and staff.
3. We planned the Campaign appropriately, followed the plan, reviewed the plan, adjusted the plan where necessary and "got it right".
4. The Campaign made a significant difference to advancing the mission of the University of Toronto.
5. The Campaign was international and identified and secured opportunities for support on a global stage.

6. The Campaign was comprehensive and included objectives for annual giving as well as planned giving.
7. The Campaign laid a sound base for ongoing advancement and the next campaign through prospect research, cultivation, solicitation, recognition, communication, and stewardship.

The remainder of this section assesses the degree to which the Campaign achieved these objectives.

## DETAILED ANALYSIS

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### **The Campaign goals and objectives were servant to the academic mission of the University**

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One key factor which set "The Campaign" apart from previous University of Toronto fund raising programs and, indeed, from initiatives at many other universities at the time, was the degree to which the Campaign was servant to academic priorities. The academic priorities identified during the "Planning for 2000" planning process, and the iterations and additional projects that emerged during the "Raising our Sights" follow-up process, were in fact the only projects for which the Campaign sought support.

Chart I

### Translating academic priorities to fundraising objectives



All gifts solicited for the Campaign and all donor agreements were subject to the approval of the provost and to the relevant policies and guidelines of the University of Toronto. We were able to assure donors that all of the projects for which we were seeking support were top priorities for the University of Toronto, as determined by rigorous academic planning.

The academic plan that emerged from "Planning for 2000" focused on human capital as the main theme. Specifically, the "Case for Support" for the Campaign focused on the academic priorities described in the accompanying table, totaling \$720 million, an amount which was more than double the Campaign's planning goal of \$300 million.

Chart 2

Academic Priority	\$ Objective in academic plan circa 1997
Great Professors (chairs and professorships)	\$250 million
Great Students (financial aid)	\$100 million
Innovative Programs	\$200 million
A Great Place to Learn and Conduct Research	\$170 million

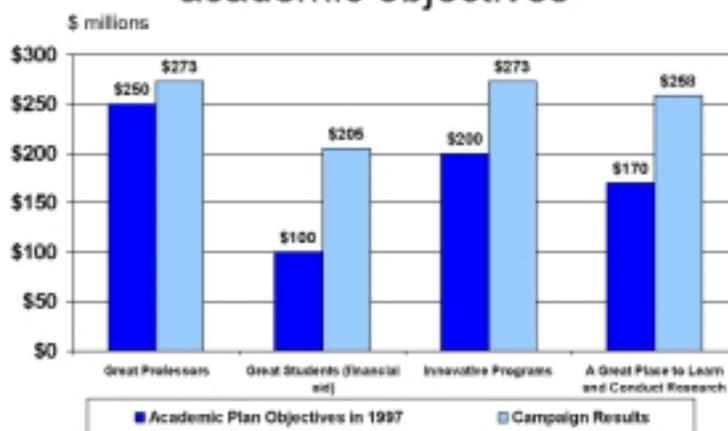
The existence of University of Toronto matching funds also helped to attract donations. For example, the University's matching chair program, which ended in June 2000, and the University's match for the first OSOTF program, as well as for OGS and OGSST created a degree of leveraging that was highly attractive to donors. Chart 3 provides an overall summary of the degree to which the Campaign obtained the support required to fund the University's academic priorities.

Ontario Graduate Scholarships in Science and Technology (OGSST)

Ontario Graduate Scholarships (OGS)

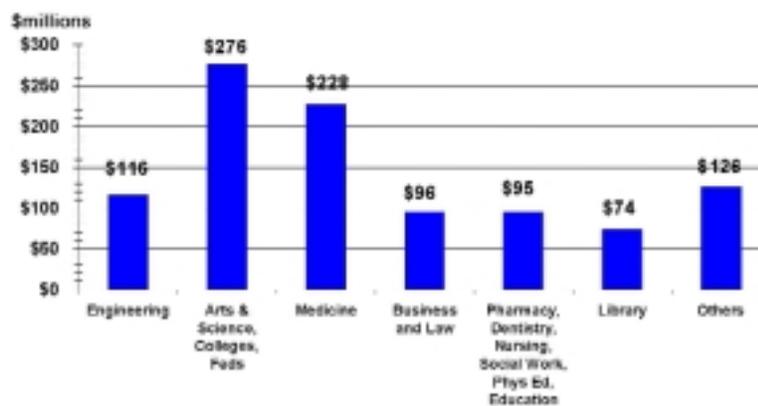
Ontario Student Opportunity Trust Fund (OSOTF)

Chart 3  
The Campaign: funds raised vs. academic objectives



Significantly, the funds raised during the Campaign were widely distributed across the University of Toronto. In many cases, prospective donors were first presented with a menu of academic priorities from various divisions, to determine areas of potential interest for further discussions. We learned that many donors were prepared to support projects that conventional wisdom would categorize as "unfundable," so long as the projects in question were

Chart 4  
Funds raised by faculty/college/ thematic area



developed as the result of comprehensive academic planning and that there was a strong consensus within the University that they were critical to the future of the relevant discipline or program.

A summary breakdown of cash and pledges by thematic area is presented in Chart 4. For the purposes of this chart, the federated universities and the undergraduate colleges are included under the category "Arts and Science" since their academic programs fall under the jurisdiction of this division. A detailed breakdown of the divisional distribution is presented as Appendix B.

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**The stakeholders in priority-setting were integral members of the Campaign team and included the President, Vice Presidents, Principals and Deans, Chairs, faculty, students, and staff**

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The University of Toronto's "top-down, bottom-up" planning has emerged as a model for other universities, and involves wide consultation in terms of academic priority-setting.

In addition, the University's internal stakeholders played a key role in campaign oversight and execution:

- The President and Vice Presidents played an active role on the Campaign Executive Committee.
- The Campaign Cabinet was composed of the Principal and Dean of each of the University's divisions, as well as the volunteer chair of each division's advisory group or campaign committee. In turn, each division's campaign team or advisory committee provided opportunities for faculty, staff, and student involvement, as determined by the relevant division's academic leadership.
- The Division of University Advancement provided briefings and updates to Governing Council; Business Board; Principals, Deans, and Chairs; the Council of Presidents; the University of Toronto Alumni Association; and divisional advisory committees and campaign groups.
- The Division of University Advancement placed a strong emphasis on integrating new academic leaders into the Campaign by conducting regular orientation sessions and by working particularly closely with newly-appointed Principals and Deans.

The academic leadership was critical to the success of the Campaign. The President, as the personification of the University, the Provost, as the link between academic planning and advancement, the Vice President Research, as the individual responsible for building research funding relationships, and Deans and Chairs, as the individuals who drive the academic aspirations of their faculties and departments, were all critical partners in the Campaign, and continue to play a key role in the University's ongoing advancement programs.

Faculty members were (and continue to be) instrumental. Some of the most remarkable gifts in the Campaign resulted from the direct involvement of members of the faculty who provided the personalized bridge to the donors. Experience teaches that relationships between faculty members and former students are often deep and lasting and serve as a powerful motivation for graduates to give back to the institution.

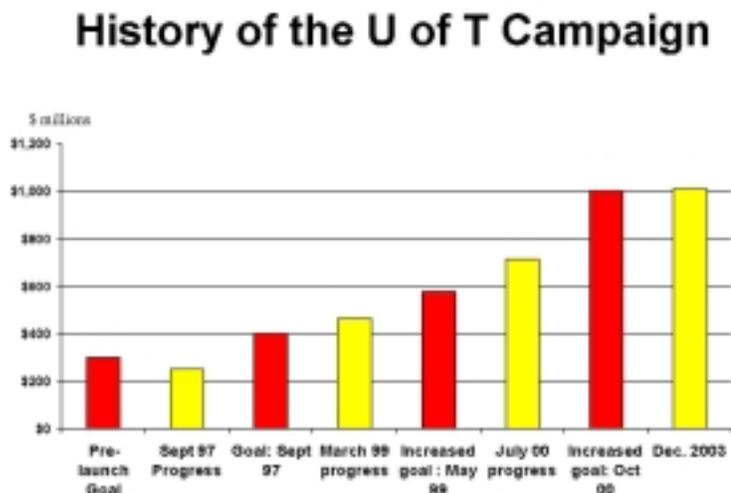
Students also played (and continue to play) a key role. We recently solicited a multi-million dollar gift from an individual in support of a new residence. He appreciated the lunch with the President, reacted well to the explanation of the Principal on why his support was important, but was visibly moved when the student we had asked to participate talked about the difference his gift would make to the lives of the students who would be living in the residence.

**We planned the Campaign appropriately, followed the plan, reviewed the plan, adjusted the plan where necessary and "got it right"**

The overall monetary objective of the University of Toronto Campaign was constantly revised, to ensure that its target reflected the University's fund raising potential as it evolved over the past decade.

As noted previously, the pre-campaign goal for the Campaign was set at the notional level of \$300 million.

Chart 5



This preliminary figure was chosen based on the University's experience during the previous "Breakthrough Campaign", the fact that U of T was raising approximately \$20 million per year in gifts and pledges at the time, and the fact that McGill University was conducting the most ambitious campaign in Canadian history with an objective of \$200 million.

By the summer of 1997, the Campaign had received \$250 million in gifts and pledges, owing largely to the success of the University's efforts to raise funds for student support through the Ontario Student Opportunity Trust Fund, and to a number of leadership gifts in the pre-campaign period, including the 1995 gift by Murray and Marvella Koffler of the Koffler Scientific Reserve at Jokers Hill, and the \$15 million contribution by Joseph and Sandra Rotman to name the Rotman School of Management. The Campaign also inspired a new generation of young alumni to make major gifts to the University. In 1996, James Mossman became the first graduate under the age of 40 to contribute the funds required to establish an endowed chair.

As a result of early success during the "pre-launch" phase, the President and the Campaign Executive set the Campaign's official objective at a minimum of \$400 million to be raised by the University's 175th anniversary in 2002. The Campaign goal was announced at a launch ceremony on Sept. 28, 1997 that culminated the "Great Minds" week at the University. The week featured a series of events organized by the Faculty of Arts and Science paying tribute to Nobel Laureates.

During the first two years of the Campaign, the University received a number of donations that helped raise the sights of philanthropists across Canada. Major contributions by the Hon. Henry N.R. Jackman, David Chu, Peter and Melanie Munk, John and Margaret Bahen, Edna Davenport, Pierre Lassonde and others, helped set the pace for the Campaign. In 1999, eBay's Jeffrey Skoll became the first individual under the age of 40 to make a multi-million dollar contribution to the University, contributing \$7.5 million to establish The Jeffrey Skoll BASc/MBA Program\*.

By the spring of 1999, buoyed by the unprecedented success of the Campaign to that point, a decision was made to increase the goal of the Campaign. It was decided to set an objective that the University was confident of achieving by the end of President J. Robert S. Prichard's term on June 30, 2000, so as not to bind the hands of his (yet to be selected) successor. Therefore, the Campaign goal was increased to \$575 million and was announced at an event to commemorate the creation of the University of Toronto's 100th chair, the Goldring Chair in Canadian Studies.

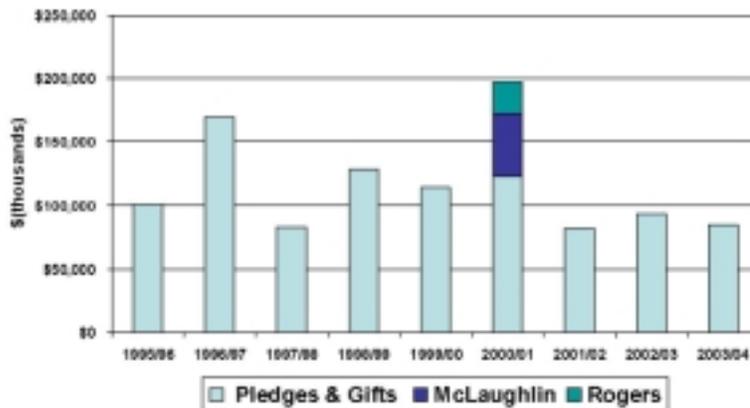
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\*Skoll recently contributed \$3.75 million to help expand enrolment in the Skoll BASc/MBA Program, which fast-tracks students combining a technical and business education. His donation will be matched by the provincial government through the Ontario Student Opportunity Trust Fund (OSOTF), to create a \$7.5-million endowment for scholarships.

Chart 6

The final year of Rob Prichard's term as President marked the most successful 12 months in the history of University of Toronto fund raising. By the conclusion of his term on June 30, 2000, total pledges and gifts to the Campaign had passed the \$700 million level. Notable achievements in the final months of the Prichard presidency

Campaign gifts and pledges per year



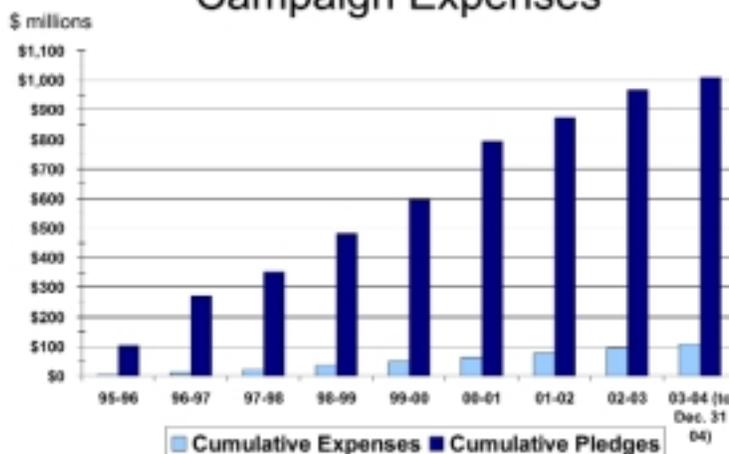
included the contribution of \$50 million by the McLaughlin Foundation to establish the R. Samuel McLaughlin Centre in Medicine, and a pledge of \$25 million by Ted and Loretta Rogers to name the Department of Electrical and Computer Engineering in memory of Edward S. Rogers Sr.

In recognition of the momentum of the Campaign and the need for the University to obtain additional private funding to support the academic priorities that were emerging through the "Raising our Sights" academic planning process, the Campaign's goal was increased to \$1 billion at the installation of Robert J. Birgeneau in October, 2000, and the Campaign was extended by two years, to December 31, 2004.

The period of President Birgeneau's presidency included the stock market decline and recession following the "dot com meltdown" and the 9/11 attacks and their aftermath. Nevertheless, total annual pledges and gifts to the Campaign remained solidly within the projected yearly range of \$80 to \$100 million per year. Noteworthy gifts during the Birgeneau presidency included Terrence Donnelly's \$13 million contribution in

Chart 7

Gifts and Pledges vs. Campaign Expenses



support of the Centre for Cellular and Biomolecular Research, the Canadian Credit Management Foundation's \$10 million gift in support of the Rotman School's Centre for Integrative Thinking, the second phase of Dr. Leslie L. Dan's \$13 million contribution in support of the Faculty of Pharmacy, and Michael Lee-Chin's contribution of \$10 million in support of the Rotman School's AIC Institute for Leadership.

The University's 175th anniversary, celebrated from March 2002 to March 2003, helped to maintain the momentum of the Campaign and to increase the profile of U of T. The 175th anniversary gave the University a new opportunity to reach out to its graduates and to highlight the contributions the University is continuing to make in the community - in Ontario, across Canada, and around the world.

On January 29, 2004, the University of Toronto celebrated the achievement of the \$1 billion objective, reached in December 2003, one year ahead of schedule.

It is important to emphasize that the Campaign attained its monetary goal without going over the budget parameters which were originally established by governance in response to a request by the Provost. Total campaign spending came in at 10.75 percent of gifts and pledges to the Campaign. This result compares favourably to the range of 11 to 13 percent that is the norm at large universities in North America. The relationship of campaign expenses to revenues is depicted in Chart 7.

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## **The Campaign made a significant difference to advancing the mission of the University of Toronto**

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The early stages of the Campaign coincided with a period of successive government cutbacks in university funding. In practical terms, these cuts meant that the University had to reduce its operating costs and most academic divisions had to reduce their faculty complement. The University badly needed something to celebrate and the Campaign provided just that.

Because the goals of the Campaign were driven by the University's academic priorities, it engaged our academic leaders and their colleagues in ways that previous campaigns had not. At a time when many of our best scholars were retiring (and in some cases not being replaced), the endowed chairs program enabled the University to attract world-class scholars in our most prominent areas. As Chart 8 illustrates, at the end of the Campaign the University of Toronto had 175 endowed chairs. Moreover, as Chart 9 illustrates, these chairs were spread relatively evenly across the University. It should also be noted that there are now an additional 85 endowed chairs at the University's affiliated teaching hospitals.

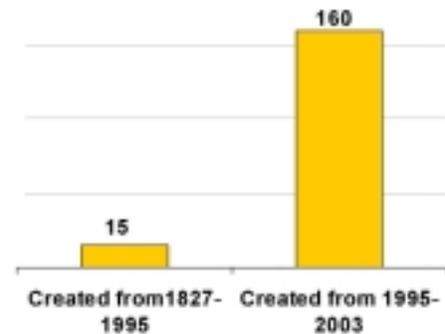
Similarly, the unprecedented success of the Campaign in attracting donations for student support, combined with matching funds from the Government of Ontario and the University, enabled the University of Toronto to maintain the University's accessibility to students from less affluent backgrounds. As Chart 10 illustrates, since 1995 we have added approximately \$430 million to the University of Toronto's endowment for student aid. As a result, U of T was the first university in Canada to guarantee as a matter of principle that no student offered admission would be unable to enter or complete his or her program due to lack of financial means. In addition, the University of Toronto now offers the most generous funding guarantee to graduate students of any Canadian university.

The funds raised by the Campaign also had a dramatic impact on the quality and scope of the University's programs. Campaign support played a critical role in strengthening the University's capacity in a wide variety of areas, from the humanities, to Jewish studies, Asia Pacific studies, and the study of the United States, to post-genomic medicine and neurodegenerative diseases, to information technology, mining, and business.

In sum, the funds raised during the Campaign provided important resources required for the University of Toronto to move forward - to truly advance - at a time when it could easily have lost ground.

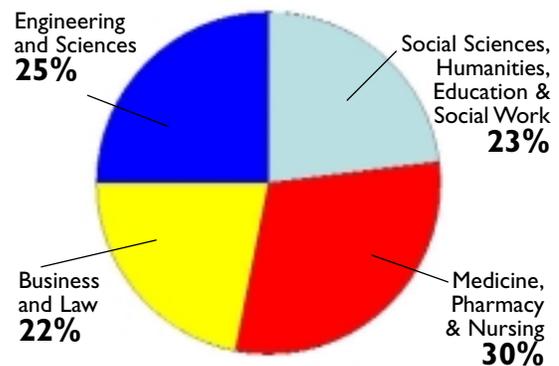
## Endowed Chairs

Chart 8



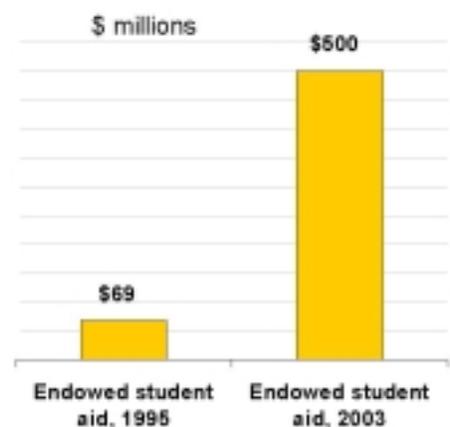
## Distribution of Endowed Chairs

Chart 9



## Endowed Student Aid

Chart 10



## The Campaign was international and identified and secured opportunities for support on a global stage

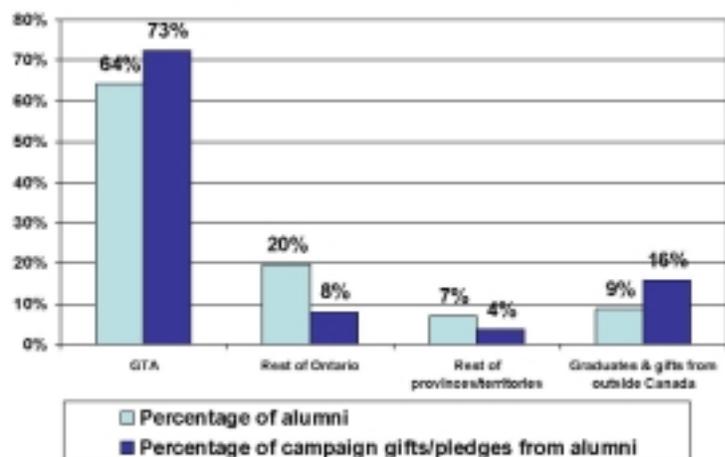
The University of Toronto strengthened its presence in a number of key international locations during the course of the Campaign, particularly in the United States and Hong Kong, where there are key concentrations of alumni.

The Campaign's international success was due largely to the following factors:

- A greater overall emphasis on alumni relations.
- A significant investment in Hong Kong over the past decade, beginning with the creation of the University of Toronto Hong Kong Foundation in 1995. The Foundation, which is largely focused on funding scholarships for Hong Kong students to come to the University of Toronto and on supporting student recruitment, played a key role in the Campaign's regional success.
- An increased emphasis by the University of Toronto on strengthening its links with alumni in key geographic constituencies, particularly in the United States.
- The University's emphasis on academic priorities with international aspirations, such as in Asia Pacific studies, Jewish and Israeli studies, the Centre for the Study of the United States, and the Woodsworth Summer Program in Siena.

Chart 11

### Geographic distribution of gifts/pledges from alumni vs. percentage of alumni

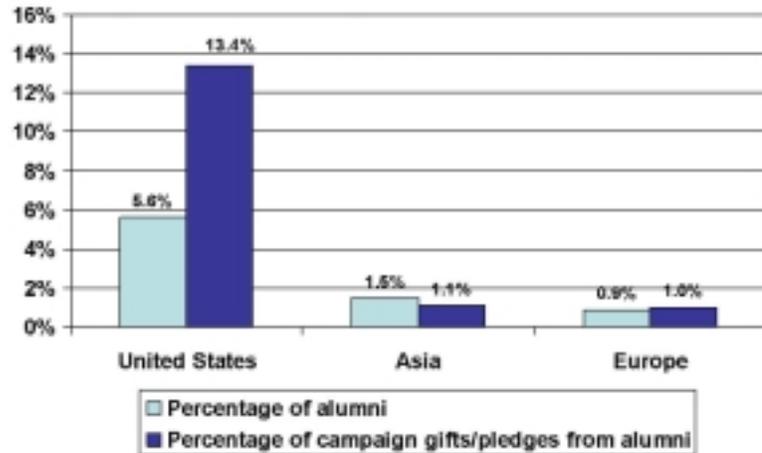


- The University's commitment to making select departments and programs at the University of Toronto competitive with those of the world's best universities. The University's plan to achieve these ambitions attracted support from a number of philanthropists in the United States and Hong Kong, who were not themselves graduates of the University of Toronto.

The results are evident in the accompanying graphs (Charts 11 and 12), which compare the distribution of the vast majority of the University's alumni with the percentage of gifts from individuals in the relevant region. In general, the distribution of gifts in the Campaign correlated reasonably closely to the international distribution of the University's alumni. In the United States, most of the support came from areas with significant alumni concentrations, particularly the Northeast and the State of California. In Asia, the vast majority of support came from Hong Kong, which is the area with the most significant concentration of alumni.

Chart 12

### Geographic distribution of gifts/pledges from alumni vs. percentage of alumni



A detailed presentation on the number of regional alumni events is presented in Appendix I.

## The Campaign was comprehensive and included objectives for annual giving as well as planned giving

The Campaign attracted gifts from more than 112,000 donors, substantially altering the face of Canadian philanthropy, and building a strong base for the future success of fund raising at the University of Toronto. In addition, by including annual giving in the Campaign, the University in effect reached out to the more than 95,000 individuals who contributed less than \$1,000, by making it possible for them to share in the University's vision and its fund raising success. Significantly, more than 50,000 of the contributors to the Campaign were first-time donors to the University of Toronto.

Faculty and Staff played a critical role in the success of the Campaign contributing almost \$48 million. The availability of matching funds for student aid was a key determinant of the success of the faculty and staff campaign. Total pledges and gifts were highest in 1996-97 and 2003-04, periods which coincide with both phases of the Ontario Student Opportunity Trust Fund; the year of the first phase of OSOTF also witnessed the highest number of faculty and staff donors over the past decade.

Gifts and pledges from the 110,525 donors whose contributions totaled \$25,000 or less during the course of the Campaign totaled approximately \$80.6 million, 97 per cent of which had been paid as of December 31, 2003.

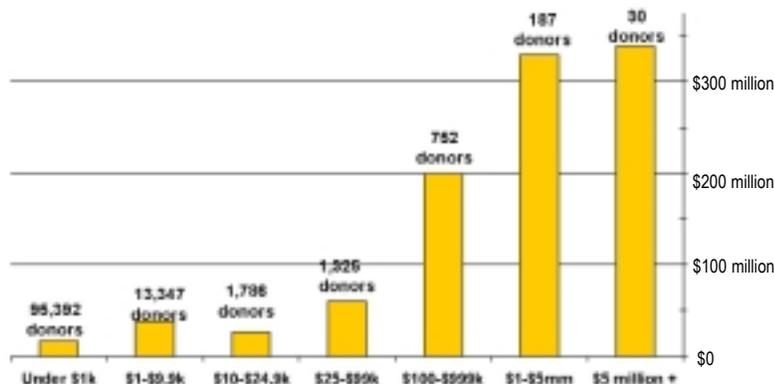
The Campaign also achieved its realized bequest objectives with over \$98 million received during the course of the Campaign.

### **The Campaign laid a sound base for ongoing advancement and the next campaign through prospect research, cultivation, solicitation, recognition, communication, and stewardship**

A decade ago, the University of Toronto was contemplating a major campaign without many of the prerequisites one would normally expect to be in place:

- The prospect research capacity of the University was somewhat limited.
- There was no structure to ensure that the cultivation and solicitation of donors was being carefully coordinated across the University's divisions. In fact, donors frequently complained that they were tired of being repeatedly contacted and solicited by faculties and colleges - sometimes on the same day - with no coordination
- There was limited infrastructure in place, and few guidelines to ensure that donors were only asked to support projects that were approved academic priorities of the University of Toronto, or to ensure that no gifts would come with conditions that could compromise academic freedom.

Chart 13  
**Distribution of campaign donors**



- The University was facing substantial challenges in its public relations. The University of Toronto was in fifth place in the 1995 *Maclean's* reputational survey. In addition, many participants in focus groups and planning study interviews commissioned by the University in the

late 1980s and early 1990s felt the University's overall profile did not match the standing of its key divisions.

- There was no comprehensive marketing program for the University, nor were there consistent design standards.
- The University had allowed its relations with donors to weaken since the completion of the Breakthrough Campaign. Many members of the Campaign staff had left at the end of the appeal, and there was no systematic program to steward donors, nor to report on the impact of their philanthropy.

The University's decision to launch a major campaign servant to its academic priorities provided the impetus to address these challenges. The decisions taken by the academic leadership and by governance a decade ago enabled the Division of University Advancement to execute the most successful campaign in Canadian history, while building the organizational and programmatic basis for U of T's next major advancement initiative.

- The University has built what is arguably Canada's strongest **prospect identification and research system**. This has been accomplished by building a team of highly experienced researchers and data mining specialists with comprehensive access to commercial databases, electronic media, and information in the public domain. This has dramatically increased our ability to identify potential new supporters and volunteers, and to identify new opportunities for potential partnerships with current donors.

The University has built a **prospect management system** that ensures that donor relationships are well-managed and provide maximum benefit. The system is based on the concept that all contacts with donors and prospects should be undertaken in a highly strategic manner. The system ensures that donors are not bombarded with requests for support, and that all contacts with donors, from their first identification as potential supporters, through their cultivation and solicitation, to their ongoing post-gift contact, are carefully coordinated, and incorporate the concerns and interests of all University divisions.

- As noted previously in this report, the Division has developed a number of systems to ensure that **all requests for support are based on the University's academic priorities**, as defined by academic planning. The University's Prospect Clearance system does not allow projects to be discussed with prospects or donors unless they are approved academic priorities. In addition, as noted previously in this report, all proposals require the approval of the relevant Principal or Dean as well as the Provostry before they are submitted for consideration to a prospective supporter. There are no exceptions. All proposals and agreements comply fully with the **Provost's Guidelines on Donations** and with all policies established by governance. In addition to

meeting the requirements of the University for the preservation of academic freedom and the promotion of academic aspirations emerging from academic planning, this system ensures that donors are fully confident they are being asked to support projects which are fully endorsed by the academic leadership. The combination of academic planning and prospect management has helped increase donor confidence and arguably has helped to increase the levels of giving to the Campaign.

- The branding theme that was developed to promote the University and the Campaign, “**Great Minds for a Great Future**” captured the Campaign's emphasis on human capital, and the imagination of many members of the University of Toronto community. Many divisions chose to utilize the Great Minds theme and its associated graphics for their own promotional materials. The result is that for the first time in recent memory, an overall "look" has emerged for University of Toronto publications, and a set of consistent messages are being communicated to the University's internal and external constituencies. The "great minds" branding also provided a key marketing tool for differentiating the University from its academic competition. This differentiation has been critical to virtually every aspect of the University's advancement, from recruiting the best faculty and students, to attracting private and government support for specific academic priorities.
- The Campaign provided an opportunity to talk to faculty, staff, students, alumni, and the community about the University of Toronto's aspirations and to **communicate U of T's vision for the future**. The University has become significantly more proactive in the generation of media releases, and the University's communications vehicles have received considerable acclaim. Initiatives such as the *Campaign Quarterly*, the redesigned *University of Toronto Magazine*, the development of the Banner Program, the ongoing redesign of the University web site, and the communications programs that were executed for the Campaign launch and the 175th anniversary all combined to raise the University of Toronto's profile. One benchmark of the progress made since the launch of the Campaign is the fact that the University of Toronto rose from fifth place in 1995 in the *MacLean's* reputation survey, to first place in 1998, a position it has held consistently since that time. In addition, the Campaign communications program received numerous awards from the Council for the Advancement and Support of Education, the Canadian Council for the Advancement of Education, the International Association of Business Communicators and the Canadian Public Relations Society.
- The University of Toronto has emerged as a leader among universities in terms of the attention it pays to **donor stewardship**. This marks a key change from the University's position as it entered the Campaign. From 1995 through 1996, the Division of University Advancement mounted a "thank you

campaign" in which a senior representative of the University met personally with the major donors to the previous campaign, to explain the impact of their support. There was a direct correlation between the outcomes of these meetings and the early success of our major gifts program. We now expect our development staff to devote approximately one-half of their time to stewardship, and we have built systems and deployed staff to ensure that all major donors are regularly informed of the ongoing impact of their philanthropy. Given the dramatic growth in the number of major donors to the University of Toronto, it is reasonable to expect that our emphasis on donor stewardship will continue to pay substantial dividends in future years.

- Finally, we have built a **human resources framework** for advancement that emphasizes accountability, transparency, and return on investment. A significant percentage of total compensation for senior advancement professionals is "at risk" if specific performance measures are not met. In addition, all salary agreements for senior staff in the advancement area are subject to a review process chaired by the Vice President, Human Resources with the advice of the Vice President and Chief Advancement Officer, and of senior members of the academic community. This ensures that the academic leadership of the University is fully consulted about the return on investment on senior advancement staff. In addition, every week a report is sent to principals and deans listing all contacts to be made with prospective donors at the University, detailing the name, position, and division of the responsible staff member. Every academic leader knows not only what his or her development staff is doing, but equally important, what the development staff is doing in other divisions. Under these open conditions, any potential issues regarding lack of performance are quickly identified.

## CONCLUSION

The Campaign did far more than raise the private funds required to support the academic objectives that were identified in the "Planning to 2000" and "Raising Our Sights" academic planning processes.

- By strengthening our relationships with long-term supporters and providing an opportunity to attract more than 50,000 first-time donors, the Campaign has greatly strengthened the University of Toronto's long term potential to obtain private support.
- By building a University-wide emphasis on donor stewardship, and by involving the academic community in all aspects of institutional advancement, the Campaign has built the basis to maintain and enhance relationships with current and future supporters.
- By providing a rationale for the University to strengthen its communications programs and to talk about its accomplishments to alumni, supporters, and governments, the Campaign has greatly strengthened public awareness of the University's capabilities as well as of the importance of its mission.
- By strengthening the University's advancement infrastructure, the Campaign has provided the University with a team of dedicated professionals who have the experience and the resources required to continue playing a key role in revenue generation and profile-building.

The University of Toronto has undoubtedly raised the bar for the generation of private support in Canada. Our success has already inspired other institutions and organizations to raise their sights, and to reach for their true potential. Going ahead, the challenge facing the University of Toronto is a simple one: to continue to raise its aspirations, while maintaining the determination and focus that made this Campaign such an unprecedented success.

# Appendix A

## FINAL CAMPAIGN RESULTS

<b>A</b>	<b>Donations</b>	<b>Pledged</b>
	Pledges & Gifts	\$ 796,835,917
	Realized Planned Gifts	98,949,080
	Gifts-in-kind	114,860,069
	<b>Total Campaign to Date</b>	<b>\$ 1,010,645,066</b>
<b>B</b>	<b>Government Funds Related to the Campaign: CFI, ORDCF, OIT, SuperBuild, OSOTF, OGSST, OGS</b>	
	Total from government*	\$ 397,317,324
<b>C</b>	<b>University Matching Funds Triggered for Campaign Gifts</b>	<b>\$ 340,047,868</b>
<b>D</b>	<b>Private Research Investment Related to Campaign Gifts</b>	<b>\$ 10,818,697</b>
<b>E</b>	<b>Future Bequest Intentions and Other Deferred Gifts</b>	<b>\$ 208,557,039</b>
<b>F</b>	<b>Gifts to Teaching Hospitals and Affiliated Institutions Supporting Education and Research at U of T which are Not Counted in Campaign Totals</b>	<b>\$ 7,166,844</b>

\* Includes OSOTF II matching earned up to December 31, 2003.

## Appendix B

### DIVISIONAL CAMPAIGN ACHIEVEMENT BY AREA OF SUPPORT

Division	Great Faculty	Great Places	Great Programs	Great Students	Total
Applied Science and Engineering	33,251,053	22,894,964	17,053,325	42,892,695	116,092,037
Architecture, Landscape and Design	1,162,649	1,307,985	631,553	854,072	3,956,258
Arts & Science	39,051,043	21,453,830	21,778,384	22,391,481	104,674,737
Dentistry	2,021,260	2,035,278	3,320,496	658,558	8,035,592
Emmanuel College	2,300	500	273,491	1,957,862	2,234,152
Forestry	435,000	75,668	461,072	584,314	1,556,054
General University*	4,137,789	19,843,737	28,541,993	18,449,205	70,972,724
Graduate Studies/Graduate Institutes & Centres	2,453,490	6,042,670	6,291,547	5,485,167	20,272,874
Hart House		1,354,998	1,498,806		2,853,805
Information Studies			2,164,767	467,420	2,632,187
Innis College	4,750	311,019	714,021	1,039,790	2,069,579
Institute of Child Study	75,965	70,248	86,587	77,826	310,626
Joseph L. Rotman School of Management	47,821,632	5,363,601	12,563,598	4,576,068	70,324,898
Law	11,645,180	2,036,434	5,228,042	6,491,392	25,401,048
Leslie Dan Faculty of Pharmacy	3,088,239	20,814,130	5,364,906	5,784,247	35,051,523
Library**	140,620	13,036,584	60,448,228		73,625,432
Massey College			4,466,755	37,300	4,504,055
Medical Alumni Association				578,877	578,877
Medicine	104,665,022	6,214,179	72,765,968	43,860,639	227,505,808
Music	3,755,846	140,597	3,697,526	4,739,995	12,333,964
New College	1,370	346,265	1,222,142	659,329	2,229,106
Nursing	1,003,600		1,412,852	2,611,865	5,028,318
OISE/UT	3,596,257	678,019	2,754,850	2,401,215	9,430,341
Physical Education & Health	46,583	134,596	3,345,330	1,121,374	4,647,883
School of Continuing Studies		18,200	200,100	30,000	248,300
Social Work	5,800,187	105,904	6,411,599	1,961,934	14,279,624
Student Affairs	6,700	511,141	1,257,419		1,775,260
Student Services			873,940		873,940
Transitional Year Programme		128,425	318,482	1,028,121	1,475,028
Trinity College	372,007	21,070,298	4,682,952	4,701,539	30,826,795
U of T at Mississauga	2,000,650	10,167,405	1,440,979	1,095,199	14,704,233
U of T at Scarborough	108,782	1,640,130	5,449,450	1,810,159	9,008,521
UTS	300,000	5,576,505	5,261,172	5,155,737	16,293,414
University College	2,570,632	16,709,920	7,257,673	5,224,393	31,762,618
University of St. Michael's College	8,873,039	7,789,276	16,042,069	3,939,017	36,653,401
Victoria College	154,503	13,236,793	15,710,493	6,726,778	35,828,568
Woodsworth College	501,525	4,915	644,154	5,012,422	6,163,016
Wycliffe College			1,147,400	133,250	1,280,650

\* General University includes: Fields Institute, Knox College, Research, Student Awards, President's Fund, Teaching Hospitals, UoT Press and Jokers Hill

\*\* Library total includes \$60,161,502 in Gifts in Kind

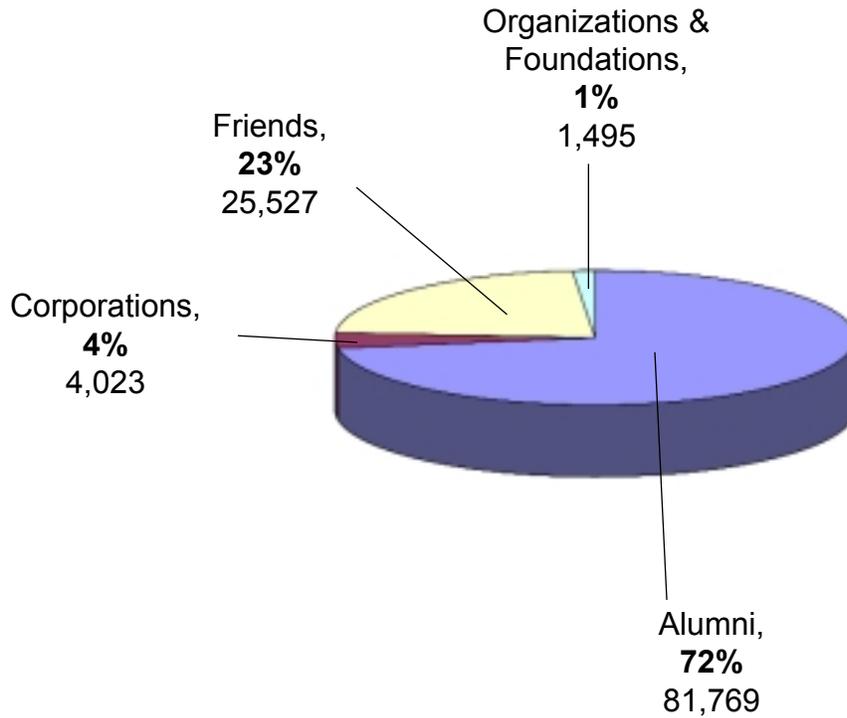
## Appendix C

### The Campaign Source of Donations As at December 31, 2003 \$1,010,645,066



## Appendix D

### The Campaign Number of Donors As at December 31, 2003 112,814



## Appendix E

### CAMPAIGN EXECUTIVE COMMITTEE

F. Anthony Comper, Chair	Norman Jewison, Chair, Annual Fund
A. Charles Baillie	Murray B. Koffler
Robert J. Birgeneau, President	Doris Lau
Wendy M. Cecil	James Mossman
George E. Connell, President Emeritus	Peter Munk, Chair, U of T Foundation
The Hon. William G. Davis, Honorary Counsel	The Hon. David R. Peterson, Honorary Counsel
Jon S. Dellandrea	J. Robert S. Prichard, President Emeritus
John R. Evans, President Emeritus	The Hon. Robert K. Rae, Honorary Counsel
The Hon. J. Trevor Eyton	Joseph L. Rotman,
Shari Graham Fell	Susan M. Scace
Al Flood	Lionel H. Schipper
Ira Gluskin	Thomas H. Simpson
Bonnie Gottlieb	Mary Alice Stuart
The Hon. Henry N.R. Jackman, Chancellor Emeritus	Richard E. Venn
	Rose Wolfe, Chancellor Emerita

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Rose Wolfe, Vice-Chair	<i>Officers Of The Foundation</i>
Allan Beattie	Jon S. Dellandrea, President
Elfrieda Heinrichs	Louis Charpentier, Secretary
Mr. Justice Frank Iacobucci	Felix P. Chee, Treasurer
Anthony MacFarlane	W.G. Tad Brown, Assistant Treasurer
Bill McLean	

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## Appendix F

### CAMPAIGN CABINET

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*Science and Engineering*

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Co-Chairs

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*Faculty of Architecture,*

*Landscape, and Design*

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*of Management*

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J. Spencer Lanthier, Former Co-Chair

*Faculty of Law*

Maureen Kempston Darkes and Brian

Levitt, Co-Chairs

*University of Toronto Library*

George Connell, Chair

George Kiddell, J. Peter McDonnell,

Donald R. Wilson, and Moses

Znaimer,

Vice-Chairs

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Mark M. Tanz, Chair, CRND

Lionel H. Schipper, Vice-Chair, CRND

*Faculty of Music*

John B. Lawson,

Chair

Elfrieda Heinrichs,

Vern C. Heinrichs, and

Mary Alice Stuart,

Honorary Co-Chairs

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Richard Rooney and Luke A. Vanneste,

Co-Chairs

Carol Stephenson,

Honorary Chair

*Faculty of Nursing*

Jeannie Butler, Chair

*OISE/UT*

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The Hon. Douglas Frith,  
Former Co-Chair  
David R. Bloom,  
Former Honorary Chair

*Faculty of Physical Education and Health*

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Chair  
Kay Worthington,  
Former Co-Chair

*St. Michael's College*

Joseph Sorbara, Chair  
Robert G. Kearns, Chair,  
the Campaign for Celtic Studies

*School of Continuing Studies*

H. Corey Jack and Brian O'Riordan,  
Co-Chairs

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Martha Cohen,  
The Hon. Margaret Norrie McCain,  
Dr. The Hon. Dame Rosanna Wong  
Yick-Ming, Honorary Patrons

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George Fierheller,  
Former Chair

*University College*

Robert Brown, Chair  
C. Warren Goldring,  
Former Honorary Chair  
The Hon. Robert K. Rae, Former Chair

*University of Toronto at Mississauga*

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Honorary Chair  
Ignat Kaneff, Chair,  
Student Centre Campaign  
Ron Nolan, Chair,  
Academic Priorities

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*Victoria University*

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Alan Dean, Former Chair  
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## Appendix G

### GROUP OF 175

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John Bahen  
Margaret Bahen  
A. Charles Baillie  
James C. Baillie

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Paul Bates  
Brent S. Belzberg  
Avie Bennett  
Paul F. Black  
David R. Bloom

Mark S. Bonham  
Harvey Botting  
Michael Bregman  
Paul M. Cadario  
Brendan A. Calder  
David M. Campbell  
Vivian Campbell  
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Gordon Cheesbrough  
Agnes Chiu Lee  
Grace Y.K. Chum  
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F. Anthony Comper  
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Leslie L. Dan  
C. William Daniel  
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Marvelle Koffler  
Murray B. Koffler  
Bruce Kuwabara  
J. Spencer Lanthier  
Pierre Lassonde  
Doris Lau  
John B. Lawson  
Harry Harold Levine  
Brian Levitt  
Wilfred G. Lewitt  
Willard J. L'Heureux  
Rita Liu  
Che Anne Loewen  
Robert E. Lord  
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Leila Joy MacKenzie  
Judy Matthews  
Wilmot Matthews

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Hilary V. Nicholls	Toby Tanenbaum
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Ted Rogers	Peter G. White
Joseph L. Rotman	Glynn Williams
Sandy Rotman	Rose Wolfe
Michael J. Sabia	Annie Wong
Raymonde Sacklyn	Stephen M.S. Yow
Anne M. Sado	Adam H. Zimmerman
Gedas Sakus	

## Appendix H

# UNIVERSITY OF TORONTO HONG KONG FOUNDATION

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Dr. Stanley Ho

### *Chair*

Dr. Patrick Y.B. Fung

### *Past Chair*

Dr. The Hon. Dame Rosanna Wong Yick-Ming

### *Governors*

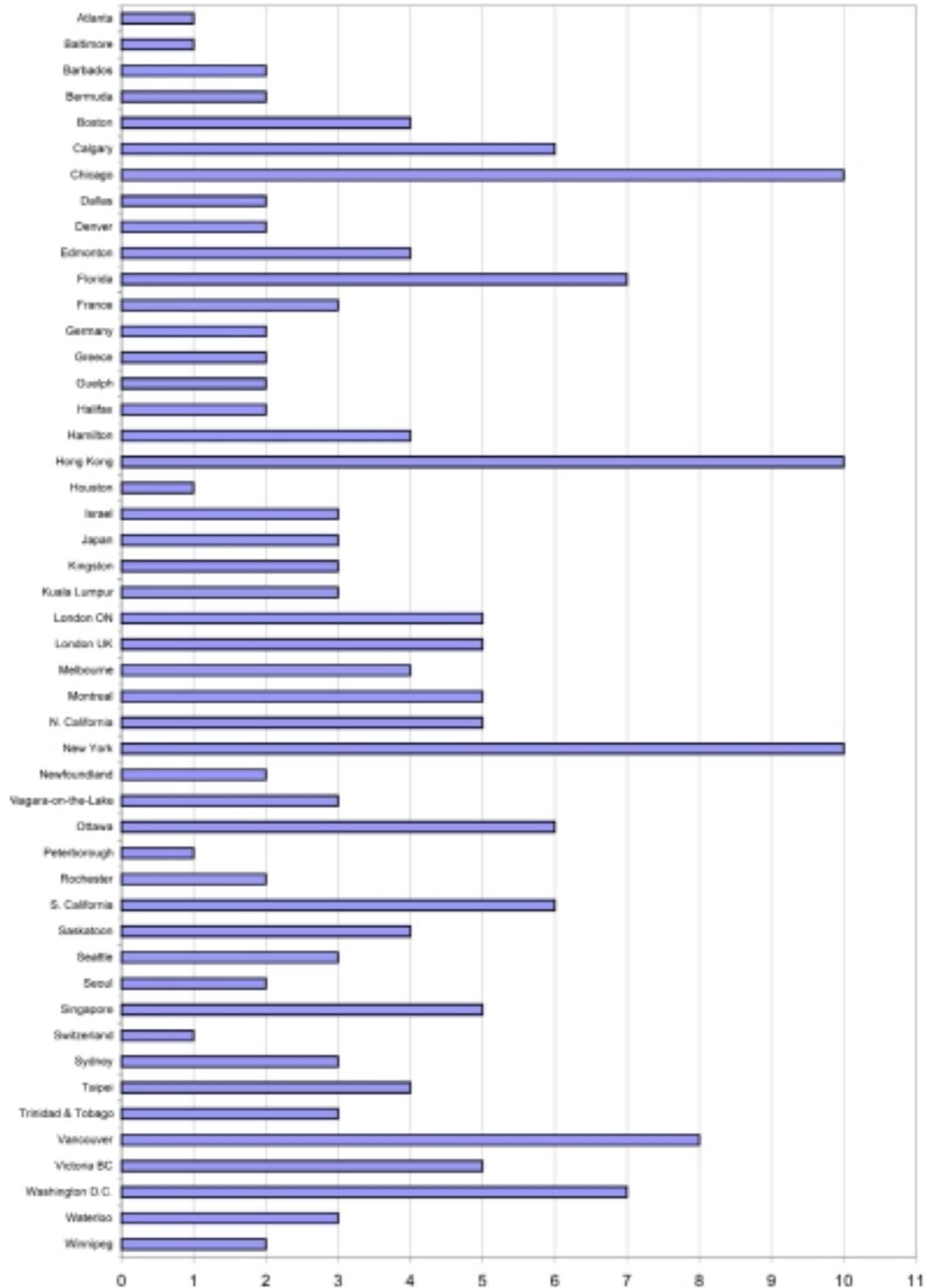
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William W.H. Doo  
Dr. Anthony Y.W. Ho  
Daisy C.F. Ho  
Patti Ho  
Wendy Kwok  
Rita Liu  
Kenneth Lo  
Dr. Dexter Man

### *Directors*

Anson Chan  
Johnny K.M. Chan  
Kevin K.C. Chan  
Vincent Cho  
Fred Kan  
Benjamin Lee  
Andrew Lo  
Dr. Evelyn Man  
Dr. Harry Pang  
Tommy Y.W. Tse  
Laetitia Yu

# Appendix I

## NUMBER AND LOCATION OF REGIONAL EVENTS 1995-2004



# REPORT ON PERFORMANCE VS. 2003-04 DIVISIONAL OBJECTIVES

This section provides a summary of the progress that DUA made on achieving the objectives presented to Business Board in the 2002-03 Divisional Report

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## **1. Reach the \$1 billion goal and celebrate the success of the Campaign**

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As outlined in the overall Campaign analysis, the \$1 billion milestone was surpassed in December 2003, one year ahead of schedule.

The University's success was celebrated by 500 supporters and members of the U of T community at a reception held at the MacMillan Theatre on January 29th, 2004. The event was billed as a "surprise announcement" and reception.

The communications around the achievement of the \$1 billion goal emphasized that the University had reached an important milestone instead of focusing on the completion of the Campaign. President Birgeneau spoke about the critical role played by the University in Toronto, in Ontario, in Canada, and around the world. He also announced that the University requires a minimum of \$1 billion in additional contributions and strong support from the federal and provincial governments over the next decade.

In addition to achieving the Campaign milestone, we reached our annual goal of raising between \$80 and \$100 million per year. (Appendix 1)

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## **2. Execute a successful initiative in response to the Ontario Student Opportunity Trust Fund**

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We made significant progress toward our \$114 million goal for the OSOTF II program. Unfortunately, in July, 2004 the provincial government announced that the continuation of the matching program beyond 2004-2005 would be reconsidered in the context of the Rae review of Ontario's postsecondary education system. As such, the government established a ceiling on the amount of matching funds available for each institution. As it currently stands, the University has raised \$16 million more than the revised matching ceiling of \$18,558,249. Lobbying efforts through the Council of Ontario Universities are underway to convince the Ontario government to reinstate matching for student

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support, or at the very least to honour all donor commitments made to the date that the announcement became effective. The University will be addressing this concern in its official response to the Rae commission.

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### **3. Build awareness of the University's emerging academic priorities and aspirations**

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The priorities emerging from the "Stepping Up" academic planning process were featured on the University's website, in a *Bulletin* insert, and discussed extensively at alumni events. A major communications strategy is being developed to be rolled out over the next fiscal year.

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### **4. Build a new structure for advancement volunteers**

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We are continuing to steward campaign volunteers and donors, and to identify potential new supporters and volunteers among the University's alumni and friends. We will develop a new structure for advancement volunteers once the timeframe and objectives of the University's next major advancement initiative have been determined.

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### **5. Build a new structure for alumni volunteers**

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The first assembly of the President's International Alumni Council was convened in May of 2004 with 34 of 56 members in attendance for three days of presentations and discussions with the senior leadership of the University. The assembly was followed by the launch of a members' website through which delegates remain apprised of University initiatives and developments. In addition, several PIAC members have taken on active volunteer roles over the summer months by hosting or facilitating regional events and "U of T Bound" events for new students and their families. The creation of this group has provided a valuable new forum for volunteer engagement with the University.

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### **6. Identify and involve the next generation of major supporters and volunteers**

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As outlined above, the process of identifying the next generation of supporters is well underway. We are actively engaged in identifying the top 400

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prospects from the larger pool of known prospects for consideration as part of the next Advancement effort.

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## **7. Enhance the University of Toronto's national and international positioning through effective communications**

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During 2003-04 the advancement communications program was largely focused on supporting the completion of the Campaign, communicating the Campaign's success, and communicating the fact that reaching the \$1 billion milestone did not mean that the University no longer requires additional private and public support. In terms of broader communications, the Department of Public Affairs focused on promoting the University's accomplishments and working with the academic leadership and with faculty and staff on issues management. The University is currently conducting a major review of all aspects of its communications and public relations programs.

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## **8. Build a more effective corporate and foundations relations program**

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Over the past year, progress has been made in improving the effectiveness and efficiency of corporate and foundation relations. As a result of discussions with the Vice President, Research, a staff position to facilitate and increase university and corporate interaction has been created.

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## **9. Assist with student recruitment**

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The Division continued to facilitate student recruitment initiatives through the strategic use of alumni in post offer receptions, school visits and the "U of T Bound" program. A significant initiative in the past year was the creation of the University of Toronto Singapore Foundation. Formally incorporated in May 2004, the Foundation's Management Committee is in place with alumnus Philip Yeo serving as Chairman. This foundation will seek to emulate the success achieved through the University of Toronto Hong Kong Foundation in identifying and recruiting exceptional students and supporting their studies at the University.

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## **10. Enhance Annual Giving Programs**

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We have made significant strides in setting the stage for ongoing improvements in the performance of our annual giving programs. A space at 89 Chestnut Street has been secured for a new call centre that, upon completion, will be the largest University based calling centre in North America. Even before the completion of the new call centre, we have expanded our calling program with appreciable results that point to the unfulfilled potential to be tapped.

We raised \$12,640,883 through annual giving programs in 2003-2004 from more than 26,500 donors, compared to \$12,637,848 in 2002-03. We aligned advertising and marketing across the University's divisions and increased coordination across the University. In addition we created an online giving option for the first time, which attracted more than \$25,000 in donations during December 2003, with no corresponding marketing expenses.

As DUA continues to invest and enhance its annual giving efforts, several positive trends in the areas of donor retention and donor reactivation are beginning to emerge, pointing to continued future successful engagement of our alumni.

We will continue to focus our investment on donor acquisition and donor retention. We will also utilize new market research techniques, to allow for more personalized approaches to alumni.

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## **11. Enhance our successful Planned Giving Program**

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Over the past year the University attracted \$9,664,637 in realized bequests and secured \$17,741,361.60 in new future bequest intentions.

We have expanded our outreach and marketing to potential and current deferred gift donors with some encouraging results. For example, a recent direct mail invitation to consider gift planning was sent out to 15,000 donors in January 2004 over the signature of Chancellor Emeritus Hal Jackman. To date, we have received 12 confirmed bequest intentions totaling \$1,061,863, requests for more information from 19 individuals, and interest in arranging a gift at a later time from an additional 40 respondents.

## **12. Maintain the intensity of the University's Stewardship Programs**

---

Stewardship has become a fundamental part of the Advancement culture at the University of Toronto; both the donor outreach and the systems required to facilitate it contribute significantly to the sustainability and potential growth of the Advancement program beyond the Campaign.

We have made tremendous progress in our stewardship practices over the course of the Campaign. Over the past year, 950 major donors received both quantitative and qualitative reports on the status of their endowment contributions. Advancement staff across the University logged over 5,600 stewardship contacts with major donors including meetings, phone calls, and personal correspondence.

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## **13. Begin to plan the next Campaign**

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A summary of our key strategies is provided in the following section of this report.

## 2004-2005: PREPARING FOR THE NEXT PHASE OF U OF T ADVANCEMENT

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**Note: This section is based on a submission that was made at the President and Vice Presidents planning retreat on August 31, 2004**

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During the upcoming year, DUA will build on the achievements of the past decade, most notably the University's record-breaking Campaign, which surpassed its \$1 billion objective one year ahead of schedule. Our overriding goal for the coming year is to maximize our contribution to resource generation at the same time as we engage in a change analysis of DUA's structure and operations in preparation for a new major advancement initiative to be launched in 2007 or 2008.

In this regard, DUA's activities over the coming year will be defined by the following five priorities:

- Develop the Case for Support for "Stepping Up" by working with the academic leadership to translate academic objectives into priorities for private funding.
- Build the basis for a refocused communications strategy and revitalized institutional marketing and promotion program, aimed at strengthening the University's profile with the media and among current and prospective students and faculty, staff, government, alumni, donors, friends, corporations (national and international), foundations (national and international) and community groups.
- Maintain the intensity of donor stewardship, cultivation, and solicitation, to ensure that the University continues to raise \$80 million to \$100 million per year in gifts and pledges, while building the donor relationships that will be essential to meeting U of T's fund raising potential. This will be critical to the success of University's next major advancement initiative.
- Ensure that the UTAA, the President's International Alumni Council and divisional alumni groups continue to evolve as effective means for

alumni to build and maintain meaningful relationships with their University. Our alumni have the potential to play a key role in student recruitment, government relations and resource generation. In addition, the size of our alumni body will enable DUA to continue developing new services for alumni (affinity programs, sponsorship, tours, etc.) beyond its current base of 50,000 participants.

- Restructure the Division of University Advancement to build on the Campaign's success. We will establish the structure and organizational model that will best prepare us for the next major advancement initiative. By continuing to enhance the Division's effectiveness, we will strengthen our ability to generate private support and increase our ability to raise the University's profile.

The remainder of this submission discusses these overarching priorities in greater detail.

## **1. DEVELOP THE CASE FOR SUPPORT FOR "STEPPING UP"**

- Work with the Provost to develop the overall Case for Support that will emerge from the Academic Plan.
- Develop a communications strategy to roll out the final Academic Plan to faculty, staff, alumni, friends, and government.
- Work in conjunction with the Provost and with Principals and Deans to develop descriptions of the next generation of academic priorities for which private support will be sought.
- Work with the Vice President-Government and Institutional Relations to ensure that the messages contained in the Case for Support and in overall communications are consistent with the University's government relations strategy.
- Work with the Vice President-Research and Associate Provost to ensure that the Case for Support is helpful in building research relationships with corporations and foundations.

## 2. BUILD THE BASIS FOR A REFOCUSED COMMUNICATIONS STRATEGY AND REVITALIZED INSTITUTIONAL MARKETING AND PROMOTION PROGRAM TO INCREASE THE UNIVERSITY'S PROFILE

We will work with the Interim President to facilitate a review of all facets of the University's communications program. This comprehensive review will build the basis for the University's communications activities and strategies. As part of the review process, the following key points will be considered:

- The requirements of the President and the Vice Presidential portfolios in the development of a series of comprehensive internal and external communications objectives and strategies for the University of Toronto.
- The degree to which the University's current communications program meets those objectives, both in their own regard, and in comparison to best practices at peer institutions.
- The best organizational structure to achieve the University's communications objectives.
- What constitutes the best branding strategy for the University.
- Considerations for the development and implementation of the best Internet strategy to raise the University's profile.

During the timeframe of the review, DUA will continue to mount a communications program supporting the University's key objectives. In addition to our ongoing activities, we will

- Utilize the new metrics being developed by the Vice President-Research to heighten awareness of the University's accomplishments and potential.
- Work collaboratively with the Vice President-Research to develop communications strategies for research and philanthropic partnerships.
- Work collaboratively with other Vice Presidential portfolios to develop communications strategies for the academic plan, government relations, and human resource related issues, among others.

- Review and revise our donor and alumni communications programs in preparation for the next major advancement initiative by the University.
- Work collaboratively with key portfolios to increase the University's profile in key geographic locations in support of student and faculty recruitment and resource generation.
- Develop post-campaign communications vehicles for alumni and donors.
- Review the effectiveness and impact of the Bulletin as the University's primary internal communications vehicle.

### **3. MAINTAIN THE INTENSITY OF DONOR STEWARDSHIP, CULTIVATION, AND SOLICITATION TO ENSURE THAT THE UNIVERSITY CONTINUES TO RAISE \$80-\$100 MILLION PER YEAR IN GIFTS AND PLEDGES**

It is clear that the University's prospect pool has been substantially strengthened by the Campaign, and that there is solid potential for long-term growth.

- The Campaign attracted gifts from more than 112,000 donors, 50,000 of whom were first-time donors to the University.
- Equally important, the Campaign attracted gifts of \$1 million or more from 217 donors.
- Nearly 200 of these donors were making their first-ever gift of \$1 million or more to the University of Toronto.

Over the coming year, the restructuring of the Division of University Advancement will be largely focused on preparing for an ambitious initiative to be launched in 2007 or 2008, while maximizing the degree to which the University can generate immediate financial resources.

Our program will consist of the following key areas:

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## **Transforming gifts**

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There are a number of individuals and foundations with the potential to give very significant gifts to the University of Toronto, provided we can continue to enhance our relationships with them, and are able to develop funding proposals that capture their imaginations sufficiently to attract a "once in a lifetime gift." One of the key factors differentiating institutions executing \$1 billion campaigns from institutions raising \$2 billion or more is the degree to which they attract gifts above \$50 million.

Our activities in this area will play a disproportionate role in defining our overall success.

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## **Major Gifts**

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Approximately 85 percent of the funds committed to the Campaign came from the approximately 0.9 percent of the donors who contributed \$100,000 or more.

Over the coming year, we will:

- Continue the University's intensive donor stewardship program. This will be the most important determinant of the success of the University's future advancement efforts.
- Continue to identify new prospects through data mining and media research.
- Work closely with divisional Senior Development Officers to help them cultivate, solicit, and steward major donors in support of divisional academic priorities.
- Provide special assistance to newly-appointed Principals and Deans in the area of major gifts.
- Continue to refine prospect management and the development of specific donor management strategies.
- Effectively utilize the time of the Interim President to assist in top-level gift solicitation.

- Capitalize upon the completion of "Stepping Up" and the development of the Case for Support as a cultivation opportunity with previous donors and emerging prospects.
- Complete the "Top 400" list (Top 400 individuals with particular emphasis on the next generation of donors potentially capable of making a gift of \$1M or more) which will be the foundation for the next advancement initiative.

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## **Gift Planning**

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The Campaign also exceeded its \$200 million objective for future gift intentions. Realized bequests over the past three years have averaged \$12.7 million per year. Given the fact that many alumni, faculty and staff are approaching their retirement years, gift planning will play an increasingly important role in private revenue generation.

Over the coming year, we will:

- Intensify prospect identification at the central and divisional levels
- Step up programs aimed at informing faculty and staff about gift planning opportunities
- Strengthen the promotion of gift planning to current annual fund and major gift supporters as well as to our alumni
- Strengthen the stewardship of donors to confirm and reinforce their future gift intentions.

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## **Annual Giving**

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The Campaign attracted support from more than 112,000 donors, most of whom were alumni whose giving came through the University's Annual Giving programs. The Division of University Advancement has made a significant investment in its Annual Giving operation over the past 12 months, including the construction of a new telephone call centre at 89 Chestnut Street.

Our overarching objective for 2004/05 is to increase total support from annual gifts by a minimum of 10 percent over the 2003-04 performance of \$12,640,883. This is the first stage in a three year plan to achieve a minimum of a 10 percent annual increase in dollars and donors.

Over the coming year, we will:

- Commence full scale operation of the largest university-based student call centre in North America. The new call centre will have 60 stations, tripling our ability to ask alumni for their support.
- Continue to increase cooperation with the divisions in preparation for a comprehensive, fully-integrated annual giving program that addresses divisional funding needs. Our objective is to create a predictable source of revenue for the divisions.
- Launch a new leadership giving program focusing on increasing annual fund gifts of \$1,000 or more by 10 percent.
- Improve the communications materials supporting annual giving - both electronic and traditional, including e-solicitation.
- Increase the annual fund's emphasis on donor stewardship.
- Enhance our level of service and responsiveness to annual donors.
- Launch a new program to ask the parents of students for philanthropic support – similar programs have been effective at other universities.

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## **Alumni Programs**

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The University of Toronto currently has over 400,000 living graduates. Our alumni have the potential to play a key role in resource generation, student recruitment, and government relations. Over the next year, we will take the following key steps to enhance our ability to motivate and involve our alumni:

- Continue to build on the success of the inaugural meeting of the President's International Alumni Council and facilitate opportunities for the Council members to interact with and support the Interim President

- Increase efforts to identify, recruit and support appropriate alumni volunteers for Governing Council, the UTAA and the President's International Alumni Council.
- Step up implementation of our strategies for increasing alumni participation after reviewing the scope and quality of programming, communications and service we provide to alumni.
- Continue to grow Canada's largest non-philanthropic revenue program (affinity programs, sponsorship, tours, etc.) beyond its current base of 50,000 participants.
- Expand our campus-based merchandising programs into the public retail environment.

#### **4. RESTRUCTURE THE DIVISION OF UNIVERSITY ADVANCEMENT**

The current structure, program design, and staff deployment in the Division of University Advancement are based on the fact that we have been actively preparing for or executing a major Campaign since January 1995. Over the coming year, we will reorganize the Division of University Advancement in consideration of the following realities:

- We are leaving the Campaign with a donor base that has roughly tripled and an average annual level of support that has roughly quadrupled since the pre-Campaign period. Our current administrative structures and programs were devised in the pre-Campaign phase and modified as required during the Campaign. We need to redeploy our resources, modify our business processes, analyze our systems requirements and restructure our operations to better reflect post-Campaign donor expectations, the evolving nature of our donor and prospect pools, and the University's changing requirements for private and public support.
- The restructuring process we are initiating will ensure we have sufficient capacity to launch a major advancement effort in 2007 or 2008.

# Appendix 1

## *Reconciliation Between University of Toronto Audited Financial Statements & Annual Fundraising Achievement*

*May 1, 2003 - April 30, 2004*

### **Audited Financial Statements 03/04**

Monetary Gifts	\$62,907,214	
Gifts-in-kind	<u>8,390,328</u>	<b>\$ 71,297,541</b>

### **Overall Fundraising Achievement 03/04**

<b>University of Toronto:</b>		
Monetary Gifts	\$62,907,214	
Gifts-in-kind	<u>8,390,328</u>	\$71,297,541
<b>Federated Universities:*</b>		
Massey	773,175	
St. Michael's	3,303,593	
Victoria	2,307,886	
Trinity	<u>2,945,461</u>	9,330,115
Total Overall Fundraising Achievement **		<u>\$80,627,656</u>

\*These figures include those donations receipted by the University of St. Michael's College, University of Trinity College, Victoria University and Massey College.

\*\*Annual Fundraising achievement does not include pledges - total includes cash + gifts in kind.

## Appendix 2

### Realized Bequests

<u>Year</u>	<u>Donors</u>	<u>Total Bequests</u>
1997-1998	131	\$10,700,250
1998-1999	138	\$12,515,727
1999-2000	121	\$12,726,017
2000-2001	121	\$10,394,773
2001-2002	111	\$8,905,291
2002-2003	127	\$19,584,147
2003-2004	111	\$9,664,637

## Appendix 3

# AWARDS RECEIVED BY THE DIVISION OF UNIVERSITY ADVANCEMENT

MAY 2003 - APRIL 2004

### **CASE District II Accolades Awards**

Gold	<i>The Campaign Quarterly</i> for four colour newsletter with a per issue cost greater than \$20,000
Silver	<i>U of T National Report</i> for individual institutional relations publications
Silver	<i>U of T National Report</i> for publications/special purpose website
Silver	<i>University of Toronto Magazine</i> for best articles of the year

### **CASE Circle of Excellence**

Gold	U of T's 175th Anniversary video for best video development feature
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### **CCAE PriX d'Excellence Program**

Gold	University College's Transforming the Student Experience proposal for best fundraising proposal
Silver	<i>The Campaign Quarterly</i> for best newsletter
Bronze	U of T Giving Website for best department or program site in the World Wide Web

## Appendix 4

### REGIONAL PROGRAMMING

MAY 2003 - APRIL 2004

#### May

Hamilton/St. Catharine's, ON	Trinity College Alumni Reception	1-May
Los Angeles, CA	All Canadian Alumni Reception	10-May
Calgary, AB	Post-Offer Reception	21-May
Victoria, BC	Post-Offer Reception	21-May
Victoria, BC	Alumni Annual General Meeting	22-May
Vancouver, BC	Post-Offer Reception	22-May
London, ON	Trinity College Alumni Reception	27-May
Atlanta, GA	Alumni Reception	29-May

#### June

Winnipeg, MB	Alumni Reception	5-June
St. John's, NF	Alumni Reception	9-June
Ottawa, ON	Post-Offer Reception	9-June
Kingston, ON	Post-Offer Reception	10-June
Thunder Bay, ON	Forestry Alumni Lunch	10-June
Dryden, ON	Forestry Alumni Dinner	10-June
Vancouver, BC	Annual SOAR Barbeque	14-June
London, UK	Alumni Reception	17-June

#### July

Bangkok, Thailand	Canada Day Celebration	1-July
Victoria, BC	Annual Family Picnic	12-July
Shanghai, China	U of T Bound	24-July
Hong Kong	U of T Bound	26-July
Taipei, Taiwan	U of T Bound	28-July
New York, NY	U of T Bound	29-July
Seoul, South Korea	U of T Bound	29-July

#### August

Singapore	U of T Bound	4-Aug
Ottawa, ON	U of T Bound	5-Aug
Barrie, ON	U of T Bound	5-Aug
Trinidad	U of T Bound	5-Aug
Edmonton, AB	U of T Bound	5-Aug
Guelph, ON	U of T Bound	6-Aug

UNIVERSITY OF TORONTO

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Rochester, NY	U of T Bound	9-Aug
Kitchener/Waterloo, ON	U of T Bound	11-Aug
Kingston, ON	U of T Bound	12-Aug
St. Catharines, ON	U of T Bound	12-Aug
Boston, MA	U of T Bound	18-Aug
Hamilton, ON	U of T Bound	18-Aug
Washington, DC	U of T Bound	19-Aug
Vancouver, BC	U of T Bound	19-Aug
Calgary, AB	U of T Bound	20-Aug
Montreal, PQ	U of T Bound	21-Aug
Saskatoon, SK	U of T Bound	21-Aug
Halifax, NS	U of T Bound	21-Aug
Winnipeg, MB	U of T Bound	21-Aug
Santa Rosa, CA	Alumni Event	24-Aug
Windsor, ON	U of T Bound	25-Aug
Peterborough, ON	U of T Bound	26-Aug
London, ON	U of T Bound	26-Aug

**September**

Chicago, IL	U of T Reception	12-Sept
Chicago, IL	All Canadian Alumni Event	12-Sept
Hong Kong	U of T Reception	18-Sept
New York, NY	Rotman Alumni Reception	18-Sept
New York, NY	All Canadian Alumni Event	25-Sept

**October**

Seattle, WA	4th Annual Canada Gala	3-Oct
Kuala Lumpur	Terry Fox Run	5-Oct
Edmonton, AB	Alumni Reception	8-Oct
Vancouver, BC	Alumni Reception	9-Oct
Niagara-on-the-Lake, ON	Alumni Reception	16-Oct
Montreal, PQ	Alumni Reception	19-Oct
Halifax, NS	Alumni Reception	20-Oct

**November**

New York, NY	Alumni Reception	5-Nov
Trinidad/Tobago	Alumni & Student Recruitment Reception	12-Nov
Windsor, ON	Alumni Reception	13-Nov
Waterloo, ON	Alumni Reception	17-Nov
Barbados	Alumni & Student Recruitment Reception	19-Nov
Hamilton, ON	Alumni Reception	24-Nov

**December**

Hong Kong	Convocation Ceremony	7-Dec
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Hong Kong	Alumni Reception	9-Dec
Singapore	Alumni Reception	11-Dec

**January**

Ottawa, ON	Alumni Reception	20-Jan
London, ON	Alumni Reception	27-Jan
Victoria, BC	Trinity Alumni Reception	28-Jan

**February**

Kingston, ON	Victoria University Alumni Reception	5-Feb
San Francisco, CA	Rotman Alumni Reception	10-Feb
Jupiter, FL	Alumni Reception	19-Feb
Hong Kong	Victoria Alumni Luncheon	20-Feb

**March**

Montreal, PQ	Victoria University Alumni Reception	8-Mar
London, ON	Alumni Reception	11-Mar
Calgary, AB	Alumni Reception	13-Mar
Tokyo, Japan	Study In Canada Education Fair	14-Mar
Seattle, WA	Alumni Reception	16-Mar
Ottawa, ON	Local Alumni Reception	25-Mar
Windsor, ON	Local Alumni Reception	28-Mar

**April**

Los Angeles, CA	All Canadian Alumni Event	17-Apr
Washington, DC	All Canadian Alumni Event	17-Apr
New York, NY	Student Reception	22-Apr
New York, NY	Alumni Reception	22-Apr
New York, NY	UC Alumni Reception	22-Apr
Chicago, IL	Alumni Reception	22-Apr
Los Angeles, CA	SMC Alumni Reception	25-Apr
London, UK	Alumni Reception	26-Apr
Peterborough, ON	Trinity College Alumni Reception	27-Apr
Paris, France	Alumni Reception	28-Apr

## Appendix 5

### REGIONAL CONTACTS

#### **Alumni Contacts Across Canada**

*Barrie, Ontario*

Donald Dowds (BASc 1953)

*Halifax, Nova Scotia,*

Bruce Russell (Juris Doctor 1979)

*Hamilton, Ontario*

Tia Geminiuc (BSc 1993 UTM)

*Montreal, Quebec*

Susan Darlington (BLS 1970)

*Muskoka/Bracebridge, Ontario*

Catherine Cherry (Med 1984 OISE)

*Newfoundland*

Ashley Morton (Engineering 1993)

*Vancouver, British Columbia*

Benjamin Garfinkel (BCom 1992  
UTM)

*Victoria, British Columbia*

Beverley Straub Watkins (BA 1967  
VIC)

*Windsor*

Jo Anne Foote (HBA 1996 UTSC)  
Winnipeg, Manitoba  
Douglas Hutchings (BA 1950 VIC)

#### **Alumni Contacts Across the U.S.A.**

*Atlanta, Georgia*

Philip Roberts (BASc 1990)

and

Nancy Bock (BA 1987 UTSC)

*Boston, Massachusetts*

Tami Kaplan (BA 1985 UC)

*Denver, Colorado*

Brian Matsumoto (BA 1977 UTSC)

*Florida*

Ken Evans (BASc 1946)

*New York, New York*

Gary Kaufman (UC)

*Northern California*

Berkeley area:

Kit Soo (Hon. BSc 1995 UTSC)

*Northern California*

Bodega Bay area:

Mary Louise Riley (BA 1948 TRIN)

*Phoenix, Arizona*

Bill Aziz (BASc 1987)

*Seattle, Washington*

Ben Dehghan (BASc 2000)

*Southern California*

Susan Brauch (BA 1974 TRIN, BED  
1975)

*Tucson, Arizona*

David Loynd (BCom 1984 WDW)

*Washington, D.C.*

Paul Cadario (BASc 1973)

and

Jean van der Tak (BA 1948 UC)

## **Alumni Contacts Around the World**

### *Argentina*

Gustavo Rochwerger (MEng 1997)

### *Australia*

Brisbane - Elizabeth Parker (BA 1973  
WDW, MSW 1975, DEd 1991)

Melbourne - Judith Walker (BSW  
1964)

### *Bermuda*

Richard Butterfield (BA 1951 TRIN)

### *China*

Gigi Pang (BA 1993 UTSC)

Hong Kong Office - Jeremy Woodall  
(Hon. BA 1999 INNIS)

Shanghai - Vincent Cho (BLA 1994)  
and

Cesare Ruggiero (Hon. BA 1999 VIC)  
and

John Kielty - Shanghai Canadian  
Alumni Network

### *England*

Michael Lucas Klosowski (BA 1993  
TRIN)

### *France*

Mark Adam (BLA 1985)

### *Germany*

Mary Kwok (Hon. BSc 1995 WDW)

### *Israel*

Stephen Glazer (BA 1968 UC)

### *Japan*

Mr. Shiro Kiyohara (BA 1960 UC)  
and

Ms. Miki Tomoeda (BSc 1989 UC)

### *Korea*

Simon Moon (ThM 1987, MA 1989,  
PhD 1996)

### *Macau*

Fred KC Kan (BASc 1964, LLB 1967)

### *Malaysia*

Kuala Lumpur - Jean-Philippe Linteau  
(MSc 1996 Geography)

### *Mauritius*

Jerry Ng Tin Sze (BASc 2002  
Electrical)

### *Mexico*

Ian Jarvie (BA 1993 TRIN)

### *New Zealand*

Kimberley Powell (BA 1983 VIC)

### *Philippines*

Genandrialine L. Peralta (MASc 1994,  
PhD 1997)

and

Francis Uy (BASc 1989)

*Saudi Arabia, Bahrain, Qatar, Oman,  
United Arab Emirates*

Raj Malik (BASc 1981)

and

Dubai - Aseem Aziz (MEng 1990)

### *Singapore*

BC Lee (MASc 1997)

and

Keff Tang (BSc 1986 UTSC)

and

Evelyn S. Wong (BSc 1972 NEW, MBA  
1974, MIR 1980)

*Taiwan*

Queenie Lo (Hon. BSc 1999 UC)

*Thailand*

Winse Lam (BASc 1995)

*Trinidad*

Angini Mohammed (BA 1994 VIC)

and

Anthony Smart (BA 1968 UC)

*Turkey*

John McKeown (ArtD 1983, BEd  
1987, MA 1995)

*Vietnam*

Mr. Linh Phan (Hon. BA 1996 INNIS)

## Appendix 6

# THE ASSOCIATES OF THE UNIVERSITY OF TORONTO, INC.

### *Members And Directors*

Paul M. Cadario, President

Ambassador Kenneth D. Taylor, Vice-President

Tad Brown, Vice-President

Rivi Frankle, Secretary

Gary Kaufman, Treasurer

Bonnie Fuller, Member

Ernest Goggio, Member

Jon S. Dellandrea, *ex officio*

## Appendix 7

### UTAA BOARD OF DIRECTORS

*Honorary President*

The Honourable Vivienne M. Poy

*Chancellor Emeritus*

The Honourable H.N.R. Jackman

*President*

Brian Burchell

*Past-President*

Barbara Thompson

*President-Elect*

Wendy M. Cecil

*Vice-President, Governance*

*Chair, College of Electors*

Michael Deck

*Honorary Vice-President*

Dr. Robert J. Birgeneau

*Directors*

Paul M. Cadario

Frederick Kan

Poonam Puri

Eira M. Thomas

Evelyn Wong

*Honorary Directors*

Donald Burwash

Betty Carter

Margo Coleman

George E. Connell

John Evans

Martin L. Friedland

Douglas Kingsbury

Rev. Robert J.F. Madden, CSB

Malcolm McGrath

J. Robert S. Prichard

Adel Sedra

David Strangway

Ilmar Talvila

*Honorary Member*

John Kirkness

## **Appendix 8**

### ALUMNI GOVERNORS

Robert M. Bennett

Inez N. Elliston

Susan Eng

Shirley Hoy

John P. Nestor

Jacqueline C. Orange

Timothy Reid

Amir Shalaby

## Appendix 9

### President's International Alumni Council

Rosalie Abella	Chao-Shiuan Liu
Richard Alway	Kathleen MacMillan
Geoffrey Bannister	Audrey McLaughlin
W. Ian C. Binnie	Joseph A. Medjuck
Harvey Botting	Paul Martin Meyer
Brian Burchell	David Miller
Paul M. Cadario	James J. Mossman
Mel Cappe	David Mulroney
Wendy M. Ceci	Rose Patten
Agnes Chan Miling	Julie Payette
Michael Cobden	Gordon W. Perkin
David Crane	Poonam Puri
Philip J. Currie	John P. Rochon
Elizabeth M. Davis RSM	Ellen B Roseman
Michael C. Deck	Peter J. Sahlas
Edward Doolittle	Anthony Isidore Smart
Bonnie J. Fuller	Yijun Song
Patrick Y. B Fung	Catherine Swift
Blake Goldring	Kenneth D Taylor
Brian Greenspan	Eira Thomas
Michael G. Ignatieff	Barbara Thompson
Sandra Irving	Kim Vicente
Richard Ivey	Vaira Vike-Freiberga
Norman Jewison	Evan H. Walker, AO
F. Ross Johnson	Bruno J. Wall
Frederick K.C. Kan	Paul Weiler
Tae Jin Kang	Evelyn Wong
Yasuji Kasuya	Dame Rosanna Wong Yick-ming
V. Maureen Kempston Darkes	Philip Yeo
Michael Kergin	
Walter Kohn	