

2005-2006

DIVISION OF  
UNIVERSITY  
ADVANCEMENT

## ANNUAL REPORT *to* BUSINESS BOARD



UNIVERSITY  
*of* TORONTO



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## Introduction

This year's report to the Business Board from the Division of University Advancement illustrates the Division's success in maintaining the momentum generated by the Campaign. During the 2005-2006 fiscal year, the University secured \$101.6 million in new gifts and pledges compared to \$84.9 million the previous year—more than in any year since 2000-2001. In achieving this result, we exceeded one of the primary objectives set out in the early stages of campaign planning: to sustain the level of post campaign support by generating \$80 to \$100 million per year.

In addition to meeting current revenue generation targets, DUA made significant progress in laying the groundwork for the next campaign by:

- Maintaining the intensity of donor stewardship and prospect identification initiatives;
- Refining and improving our annual giving programs;
- Strengthening our ties with alumni; and
- Investing in divisional collaboration and support.

DUA also played a major role in providing support and direction for the Strategic Communications unit pending the creation of the position of Assistant Vice-President, Strategic Planning and leading up to the hiring of Judith Wolfson as the Vice-President, University Relations.

For the first time, as part of our commitment to better inform the Business Board about university-wide alumni activity, this report includes sections on Divisional Alumni Programming, Events, Communications and Volunteer Involvement and Recognition. These sections describe initiatives undertaken by more than 30 colleges, faculties and departments of the University.

On behalf of my colleagues at DUA, it remains a great privilege to work with students, faculty, staff, alumni and friends for the advancement of the University of Toronto.

RIVI FRANKLE

Interim Vice-President and Chief Advancement Officer  
University of Toronto

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## ANALYSIS OF 2005-2006 PERFORMANCE AGAINST OBJECTIVES

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### Development, Objectives and Performance

*1. The Division will maintain its commitment to build on the post-campaign plateau of raising \$80 to \$100 million per year in support of the University's academic priorities.*

The Division exceeded this objective in 2005-2006 by securing \$101.6 million in gifts and pledges overall compared to \$84.9 million in 2004-2005. This total includes:

- \$15.6 million in planned gifts (realized bequests, annuities, trusts and insurance policies).
- \$14.3 million in annual gifts and pledges from more than 29,000 donors. Of this total, \$1,065,604 in gifts and pledges was received from 11,056 donors through the call centre, compared to \$697,836 from 7,557 donors in 2004-2005. The average gift generated by the call centre in 2005-2006 was \$96, compared to \$92 in 2004-2005.

The University's historic and current advancement activity yielded \$88.4 million in cash and gifts in kind for the University in the 2005-2006 fiscal year. Please see appendix E for the reconciliation between the audited financial statements and this result.

*2. Work with the Divisions to develop the new Advancement Catalogue of approved academic priorities.*

DUA worked with the Provost and Principals and Deans to develop the new Advancement Catalogue of approved academic priorities. This project will be completed by the end of the calendar year, 2006. The Advancement Catalogue is an ongoing project that evolves continuously in response to shifting institutional priorities, new matching programs, and changes in divisional academic leadership.

*3. Expand the list of top prospects by 25 per cent from 400 to 500 individuals, corporations, foundations, and organizations.*

DUA has achieved the objective, expanding the list of top prospects to 501. The identification of the next generation of potential top donors, and of current supporters with the potential to either renew or increase their support, is critical to the success of the next campaign. A top prospect is one who is deemed to have the potential to give \$1 million or more.

*4. Integrate the President into the cultivation, stewardship, and solicitation of major donors, as appropriate.*

The President met with 30 prospects and donors between October and April 30. Strategies for the President's involvement with the top 500 prospects are being developed and refined.

*5. Provide personalized stewardship to major donors and generally intensify stewardship efforts across all giving areas.*

DUA provided detailed stewardship reports to 1,152 donors in 2005-2006, an increase of almost 17% over the previous year. Stewardship is critical to the ongoing success of the University's advancement program as well as to the next campaign. Financial and qualitative accountability to our major donors will help to ensure their continued support.

DUA continued to provide major donors with highly personalized correspondence, invitations, and copies of articles and annual reports specifically tailored to their areas of interest at the University of Toronto. Close to 300 personalized communications of this type were generated in 2005-2006. In addition, six donors were presented with highly detailed "Impact Reports" highlighting the tangible effects of each contributor's support on students, researchers, teaching, and campus life.

*6. Maximize support for student financial assistance through the Ontario Trust for Student Support (OTSS) and the Graduate Student Endowment Fund (GSEF) matching program.*

The University's efforts in this area are ongoing. As of April 30, 2006 the University had raised \$3.6 million under GSEF, which will result in 72 new graduate scholarships. In addition, \$11.3 million was secured through the OTSS program.

*7. Complete a new Awards Reference Guide.*

In November 2005, DUA completed a new Awards Reference Guide for staff across the University who work with donors to student awards. The guide is a training tool and a resource that includes policies, procedures, best practices and templates.

*8. Increase the value of new confirmed future bequest and other deferred gift intentions by 10 per cent.*

DUA increased its deferred gifts by 25 per cent: \$25.3 million in deferred gifts were secured compared to \$20.2 million in 2004-2005. To achieve this objective, DUA produced new promotional materials targeting planned giving prospects and donor advisors, including advertising and a brochure distributed to more than 8,000 prospects. Prospect visits by Gift Planning staff increased to 170 from 121 in the past year with an additional increase in visits initiated by the colleges and faculties.

*9. Increase the number of donors and the level of annual giving by 10 per cent.*

Annual Giving results remained close to 2004-2005 totals despite setbacks in the fall solicitation that serves as the cornerstone of the program. Since then, a new manager of annual giving has been named and the program is regaining momentum.

Qualifying levels for the President's Circle were reviewed and will be increased to \$1,827 as of January 2007 to coincide with the 30<sup>th</sup> anniversary of the recognition society. A letter was sent to 4,976 current Presidents' Circle members in January 2006 explaining the change. The mailing did not contain a solicitation but it generated \$36,000 in new gifts.

*10. Work with the University's academic leadership to develop a framework for the establishment of an advancement program that targets the parents of students.*

DUA continued to work with the University's academic leadership to develop a framework for a program aimed at the families of students. Programs of this nature have been established at universities in Canada and the United States. They increase family affinity and provide a valuable source of support.

*11. Review the University's Naming Guidelines to ensure both their consistency and their ability to serve institutional objectives.*

As part of a review of current policies and procedures, DUA examined the University's Naming Guidelines. In September 2006, a revised document was produced after the completion of an audit of peer institutions comparing our guidelines and costs of naming chairs, professorships, named scholarships, faculties, schools, departments, and capital projects.

## Alumni Affairs, Objectives and Performance

*1. Undertake a comprehensive review of our alumni programs, both across the institution and in DUA, to determine the most appropriate structure and programming to enhance the University's relationships with its 400,000 plus alumni.*

In June 2005, in response to Vice-Presidential transition and the Stepping UP planning process, DUA initiated a review of alumni affairs both centrally and in the divisions. One aspect of this review was an external audit carried out by Dan White, a consultant and former director of alumni affairs at Princeton.

The results of these reviews point to the need for a university-wide strategy for alumni affairs leading to the development of a longer term plan encompassing the objectives and tactics of both DUA and the colleges and faculties.

*2. Complete the construction of a new web site for alumni and friends.*

DUA has taken a leadership role in carrying out the review, analysis and sourcing of suppliers of software for the alumni and friends' web site and an online alumni community on behalf of the colleges and faculties. The new software should be in place by spring 2007.

*3. Build on the momentum created by the President's International Alumni Council (PIAC) assemblies in 2004 and 2005 to utilize PIAC members in support of the University*

The third PIAC assembly was held in May of 2006 under the leadership of President David Naylor. Most previous assembly attendees returned for the third time this past year and contributed to the rich and dynamic agenda that invited member comment on the University's brand and on the balance between free speech and human rights on campus. In total, 29 members were in attendance this year, 26 of whom had attended at least once in the past. Going forward, PIAC members will be engaged with issues such as student recruitment, community relations, and advocacy.



*4. Establish a full service secretariat to support the work of the University of Toronto Alumni Association and the President's International Alumni Council.*

DUA has been facilitating the UTAA's efforts to support the University's alumni volunteer leadership. DUA has supported the UTAA's Constituency Relations Committee, which is taking the lead on senior volunteer outreach and training.

As part of our ongoing efforts to provide professional support for the UTAA, the Director of Operations for DUA, a certified accountant, has been designated as the financial director for the UTAA.

DUA continues to facilitate the work of the Senior Alumni Association in its efforts to deliver lectures for alumni and volunteer resources for the University. DUA also supports the Soldiers' Tower Committee members in their work on the Remembrance Day Service and the ongoing maintenance of the Soldiers' Tower Memorial.

In addition, a staff member has been designated to research, monitor and recommend potential alumni volunteers for various committees and roles across the University.

*5. Continue to acquire new clients for our Affinity Marketing Programs and ensure that alumni receive competitively priced, high quality products and services, which also generate revenue for the University.*

DUA continues to operate the affinity programs on behalf of the Colleges and Faculties providing a high level of service to more than 65,000 client accounts, an increase of 8.5% from 2004-2005. The travel program saw an increase of almost 20 per cent over 2004-2005 with 355 participants.

Revenues from these programs continue to provide financial support for college and faculty alumni activities. Specifically, \$90,000 in credit card program proceeds was transferred to more than 30 divisions and \$300,000 in affinity sponsorship revenue was made available for a number of student and alumni related programs across all three campuses for athletic activities, leadership development, and cultural and recreational initiatives. Divisions are invited to apply for sponsorship revenue each fall and granting takes place before calendar year end. Additional affinity revenue is transferred to the UTAA and contributes to the Association's operating funding.

To ensure long-term revenue stability, we initiated the process of moving all affinity partnership agreements to multi-year contracts. Both insurance programs now have 10-year agreements and the MasterCard agreement is also based on a 10-year contract.

*6. Harmonize the many disparate communications vehicles and messages alumni receive from the University.*

DUA created the "You are ALUMNI" communications campaign to better unify the look and feel of alumni communications materials and to highlight the value and importance of all graduates to the University. The campaign was initiated with the graduating class of June 2006 who received a number of electronic invitations and messages. Responses to this outreach have been very positive.

DUA continued to coordinate, edit and distribute electronic communications on behalf of the colleges and faculties. DUA facilitated more than 164 e-communications in 2005-2006.

In addition, DUA continued to distribute *E-News* on a monthly basis to approximately 100,000 alumni. *E-News* includes information about research, teaching, students and alumni activity and has an “unsubscribe” rate of less than 0.5%

We prepared more than 1,200 personalized letters of congratulations and condolence for alumni facing milestones in their lives.

In addition to the above, DUA also carried out the following initiatives:

- The Shaker series for young alumni was expanded to include world-wide events coinciding with spring reunion festivities. Events were held concurrently in London, England, Vancouver, and Toronto, and were completely sold out.
- The University created two new awards in honour of outgoing Vice-Presidents Carolyn Tuohy and Jon Dellandrea. These new awards were added to the Awards of Excellence program bringing the total number of awards to nine.
- The University continued to recognize outstanding student and alumni volunteers through the Cressy and Arbor Awards: 170 Cressy Awards and 101 Arbor Awards were presented in 2005 – 2006.
- The annual university-wide spring reunion alumni event attracted more than 1,500 alumni to both central and class specific events. DUA, in cooperation with the UTAA, hosted special events for the 25<sup>th</sup>, 50<sup>th</sup>, 55<sup>th</sup> to 70<sup>th</sup> anniversary years. This past year, 186 alumni who graduated 55 years ago or more received the Chancellor’s medal.
- Regional programming outside of the greater Toronto area is included in **Appendix G**. A notable regional event was the sixth Hong Kong Convocation in April, 2006 with Chancellor Poy and President Naylor in attendance. The event attracted close to 100 graduates from across the Asia-Pacific region, as well as 700 family members and friends.
- The Asia-Pacific Advancement Office in Hong Kong held a series of welcome receptions in the summer of 2006 in the following locations:
  - Singapore, July 29, 2006: 100 students, alumni and parents attended a reception at the Regent Hotel.
  - Shanghai, July 29, 2006: 52 new students and parents joined in an all-Canadian welcoming reception co-presented by the University of Toronto, held at Shanghai Jiaotong University.
  - Guangzhou (China), August 3, 2006: 18 new students and alumni attended an informal dinner at Senses Restaurant.

- Hong Kong, August 5, 2006: 172 students, parents and alumni joined in an afternoon reception at Madison's Restaurant and Bar.
- Beijing, August 7, 2006: 63 new students, parents and alumni attended the first-ever U of T Bound event in Beijing, held at the Beijing Traders Hotel.
- Seoul, August 12, 2006: 151 new students, alumni and parents attended an afternoon reception at Seoul's well-known Lotte Hotel.

### ***Divisional Alumni Programming:***

Divisional programming represents the most significant proportion of the University's outreach to alumni. Alumni have multiple opportunities for engagement with their University through their colleges, faculties, academic departments, and through athletics.

Over the past year, DUA initiated a process to capture more divisional alumni-related activity on our database with the goal of analyzing alumni attendance and participation patterns as well as the demographic profiles of attendees. While not yet complete, this analysis will help the University to better track alumni initiatives. In addition, it will help the Division to target alumni programming and communications more effectively.

### ***Alumni Events:***

Based on the total number of alumni events *for which attendance statistics were reported*, almost 300 divisionally based alumni related events took place in 2005-2006 with total *reported* attendance of 16,500 alumni. Most of these events brought alumni back to campus (77 per cent). The events focused on alumni outreach (26 per cent); involving alumni in campus life (24 per cent); educational events (18 per cent); and reunions (11 per cent).

Our analysis demonstrated that events which brought alumni back to campus had the highest average attendance (101 attendees). Educational and young alumni events were a close second with an average of 89 and 83 attendees respectively.

### ***Communications:***

Almost every division produced and distributed at least one alumni-targeted publication in 2005-2006. More than 348,000 alumni received at least one divisional print publication over the past year in addition to the *University of Toronto Magazine*.

### *Alumni Volunteer Involvement and Recognition:*

Almost half the Divisions reported holding at least one award ceremony or recognition event for alumni volunteers or distinguished alumni over the past year.

The majority of divisions reported at least one forum for alumni volunteers including: 21 Advisory Boards or Committees, 25 alumni associations, 35 event committees and 18 alumni-student mentorship programs.

## **Divisional Engagement, Objectives and Performance**

The success of our advancement efforts in future will depend on collaboration with and support of the University's divisionally based advancement offices. To that end, DUA's objectives for the past year focused on continuing to support divisional advancement efforts. DUA continued to provide services such as prospect identification and research, assistance with the preparation of proposals and donor communications materials, assistance with gift planning and annual gifts, student and alumni volunteer recognition, convocation communications, young alumni programming and advancement-specific professional development.

- 1. Review the mechanism for the allocation of advancement budgets and staff to the divisions in consultation with the Provost in time for the 2006 budget process.*

This process is ongoing.

- 2. Hire senior advancement staff for the divisions.*

During the past fiscal year, five new Senior Development Officers were hired, for Forestry, Architecture, School of Graduate Studies, Engineering, the University of Toronto at Scarborough, University College and the School of Continuing Studies.

- 3. Organize an internal conference for the 300 DUA and constituency-based advancement staff members in January 2006.*

The conference was held on January 24 and 25 with more than 135 Advancement staff from across the University in attendance. The conference featured staff and faculty speakers and received overwhelmingly positive reviews from the staff members in attendance.

In addition, monthly professional development and training opportunities are in place for the 300 advancement staff across the University. Offerings include web based conferences and workshops offered by staff members with a particular area of expertise.

These initiatives complement the extensive orientation and training process offered to all new advancement staff members, and the online advancement reference guide that provides the latest information about advancement best practices and internal policies and procedures. Monthly meetings with senior advancement staff from key divisions are held to discuss current issues and long term strategy.

In addition, a bi-weekly electronic newsletter, *UPDATE*, is generated and distributed by DUA to keep all the Divisions apprised of the latest advancement news and developments.

*5. Continue active collaboration on communications materials with divisionally-based advancement units and Vice-Presidential portfolios.*

DUA prepared new collateral material for use by colleges and faculties for use in annual and planned giving as well as for Spring Reunion. DUA continued to provide strategic assistance to Divisions on the translation of academic priorities into funding priorities and continued to work with the colleges and faculties on proposals for major prospects.

## **Administrative Review, Objectives and Performance**

Over the past year, DUA carried out an administrative review in anticipation of the next campaign and the changes in Public Affairs.

*1. Review DUA's staffing structure.*

The review was carried out and several additional interim staffing changes were confirmed, including the appointment of an Interim Assistant Vice-President. Preparations were made for the staffing changes resulting from creation of the Strategic Communications unit and its eventual separation from DUA.

*2. Review technical infrastructure.*

The review of technical infrastructure continued, as did the expansion of online reporting to facilitate information sharing with the Divisions and to enhance our ability to track quantitative and qualitative results. Efforts to capture donations data from affiliated institutions such as the Toronto School of Theology, Knox College, Wycliffe College, and Massey College are in progress.

DUA also developed a strategy for more proactive acquisition of home and business addresses, phone numbers, e-mail and employment information for alumni, donors and friends on our database. We recently completed a successful project in collaboration with Engineering, which involved extensive updating and researching of address information. During the coming year, DUA will continue to seek out these partnerships with various divisions to work on address improvement.

*3. Contribute to a proposal for the review of the Advancement Professional (AP) staff member classifications that includes consistent criteria for assignment of the AP designation.*

This review is currently underway with the Vice-President, Human Resources and Equity.

*4. Review Advancement practices and policies to ensure compliance with new provincial privacy legislation and regulations, FIPPA.*

DUA continues to play a leadership role in determining and communicating FIPPA compliance requirements to advancement staff across the University.

*5. Create a national disclosure service for universities that sell collegiate apparel.*

DUA took a lead role in creating this service.

*6. Work with the Provost's office to determine the method of allocating Advancement costs as part of the new budget model.*

This process is ongoing.

*7. Review accounting standards for donations in preparation for the next campaign.*

DUA is examining the most recent standards prepared by the Council for the Advancement and Support of Education (CASE) as well as participating in a survey comparing counting standards of G10 Universities.

*8. Review the effectiveness of Advancement programs outside Canada.*

Evaluation of the Asia Pacific office will take place as part of an overall International Strategy for the University.

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## CONCLUSION

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In order to meet the ambitious objectives of Stepping UP, the University of Toronto will be required to further enhance its ability to attract private support, broaden its public profile, and build closer relations with its alumni.

Over the next year, the Division of University Advancement will continue to work with academic and volunteer leaders and divisional advancement staff to enhance alumni and community relations by providing meaningful opportunities for engagement. We will also continue to meet our revenue generation targets and lay the groundwork for the next Campaign.

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## DUA OBJECTIVES FOR 2006-2007

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As was the case for the priorities which we set for 2005-06, our overriding goal for the coming year is to maximize our contribution to resource generation at the same time as we prepare for the next major campaign. We will also work proactively to continue strengthening the University's alumni relations programs, and will work closely with the other members of PVP on the achievement of presidential objectives.

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

- Continue to raise \$80-\$100 million per year in support of the University's academic priorities.
- Build the strategic framework for the next campaign and prepare for its launch by executing its "quiet phase."
- Raise the profile and calibre and broaden the scope of the University's alumni initiatives.

### *1. Continue to raise \$80-\$100 million per year in support of the University of Toronto's academic priorities*

In 2005-06, the University of Toronto secured \$101.6 million in new gifts and pledges. This represents both an increase of 20% over the \$84.9 million received in 2004-05, and the University of Toronto's strongest fundraising performance since the 2000-2001 fiscal year.

Over the coming year:

- We will continue to work with divisional SDOs to develop their ongoing capacity to cultivate, solicit, and steward major donors, and provide special assistance to newly-appointed Principals and Deans. In this regard, we are organizing a Development for Deans workshop in October, 2006.
- We will continue to support the President in his work with top prospects and donors.
- We will continue to identify new prospects through data mining and research.
- We will maintain the University's intensive donor stewardship program. This will be the most important determinant of the success of the University's future advancement efforts.
- We will increase overall annual giving revenue by approximately 10%.



- We will seek to increase the average gift obtained by the Call Centre to \$100 from \$96.
- We will seek to raise \$50,000 in new online giving, and will increase our efforts to obtain corporate matching gifts.
- We will also aim to increase the value of confirmed gift intentions by a minimum of 10%.
- We will work with the Vice-Provost, Students to design a family program that will include a solicitation component; the goal for this year is \$500,000.

***2. Build the strategic framework for the next campaign and prepare for its launch by executing its “quiet phase”.***

We will undertake the following key initiatives in 2006-2007 to prepare for the next Campaign:

- We will continue to identify top prospects and potential volunteers, and develop a pre-campaign program for their cultivation by the President and the academic leadership.
- Build the Case for Support. This includes working with the Vice-President and Provost and with the Principals and Deans to complete the translation of academic priorities to campaign priorities, and to reconcile the list of campaign priorities in each division with the known prospect base as a reality check.
- Build the strategic framework for the campaign. We will determine the need for and make a recommendation to the President on the selection of campaign counsel. The planning activities for 2006-2007 will also include the finalization of the campaign counting methodology, the review of advancement policies and procedures, and a review of the information technology requirements of the campaign.
- Develop strategies for the solicitation of a nucleus of truly transformative gifts by the President over the next few years.

### ***3. Raise the profile and calibre and broaden the scope of the University's alumni initiatives***

Our priorities will be to:

#### **a) Develop a new framework for the relationship between DUA and the divisional alumni staff.**

- In conjunction with our divisional colleagues we will establish overall objectives and university wide benchmarks for success in alumni relations.
- We will systematically collect and track alumni activity carried out by the colleges and faculties and present this information for demographic analysis and for annual accountability reports (Business Board).
- We will work with Principals and Deans to establish optimum working relationships with Divisional ADO's.

#### **b) Raise the profile of alumni activities**

- Establish a timetable for the creation of a more appropriate location for the alumni offices on the first floor of 21 King's College Circle.
- Complete the hiring of the full staff complement in alumni affairs.
- Focus intensively on the redevelopment of the alumni and friends web space. By fall 2007, we will ensure that on line community software has been selected and thoroughly tested in consultation with faculty and college alumni staff. We will develop a marketing and promotional plan to accompany the launch of the online community.
- Engage the UTAA in initiatives that will enhance their role, relationship and visibility with divisional and other U of T alumni volunteer leaders.
- Revamp Spring Reunion planning, programming and promotion to ensure that the program has greater visibility among alumni and the University community.
- Continue to implement the regional programming plan based on identification and analysis of target locations and regional alumni and donor populations and behavior. Revitalize the regional alumni volunteer network in support of the plan.

**c) Provide a high level of service for the alumni population at large and alumni volunteer leaders**

- Provide strategic direction and support for those colleges and faculties requiring assistance with their alumni relations portfolios.
- Work with the UTAA in supporting its efforts to revitalize the Council of Presidents and help the association to play a leadership role with alumni volunteers.
- Continue to enhance the services available to alumni as part of the Affinity Marketing and Licensing Unit; continue to offer high calibre affinity products and services and maximize revenue and client base; explore the idea of providing not for profit services for alumni which will in turn encourage greater affinity and engagement.
- Refocus alumni convocation communications to emphasize services available to recent graduates.
- Expand young alumni programming
- Continue to build on Toronto and Ontario focused alumni programming;
- Revitalize programming and volunteer structures outside the greater Toronto area.

**d) Ensure alumni programming and initiatives are aligned with and advance the University goals**

- Ensure that alumni programming supports and intersects with all the Vice-Presidential portfolios when and where appropriate.
- Take the University's current focus on the quality of the student experience into consideration in all alumni initiatives. Where and when possible, alumni initiatives will support this preeminent objective. To that end, re-establish connections between the UTAA and the student leadership – coordinate and host meetings and events that bring together the student leadership with the alumni volunteer leadership. Support orientation activities and other student initiatives through the pillar sponsorship fund.
- Introduce alumni programming to current students and with particular focus on students in their final year.
- Facilitate the expansion of alumni mentorship programs at the colleges, faculties and departments.

- Contribute to the Convocation Review process to ensure that the alumni perspective is represented in the committee's deliberations.
- In cooperation with the Vice-President, Human Resources and Equity, launch a new UTAA sponsored award of excellence to recognize outstanding staff members.
- Collaborate with the School of Continuing Studies for alumni involvement opportunities.
- Ensure that regional alumni initiatives are synchronized with U of T's international strategies for fundraising, student recruitment and exchanges, research opportunities and government relations, working closely with the Vice-President, University Relations and the Vice-Provost, Students.
- Continue to support the President's International Alumni Council as it evolves into smaller working groups in support areas of the University's agenda.
- Support the University's advocacy agenda where alumni involvement is deemed to be helpful.

# Appendix A

## ANNUAL FUNDRAISING

### ACHIEVEMENT FOR FISCAL YEAR 2005-2006

Pledges & Gifts	\$74,639,959
Realized Planned Gifts	\$15,615,564
Gifts-in-kind	\$11,437,129
<b>Total</b>	<b>\$101,692,652</b>

<b>Government Funds:</b>	
OGSST	\$1,580,000
OGS	\$6,351,270
OTSS*	\$11,336,369
<b>Total</b>	<b>\$19,267,637</b>

<b>Unrealized Planned Gifts</b>	<b>\$25,359,751</b>
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\* Due to differences in the provincial government's fiscal year-end (March 31) and the University's year-end (April 30), \$3,995,451 of the government's 2006-2007 OTSS allocation was received by the University before April 30, 2006.

# Appendix B

## DIVISIONAL ANNUAL FUNDRAISING ACHIEVEMENT FOR FISCAL YEAR 2005-2006

Applied Science and Engineering	7,575,443
Architecture, Landscape and Design	278,265
Arts & Science	16,158,041
Dentistry	1,652,267
Forestry	261,173
General University*	4,735,187
Graduate Studies	1,346,672
Hart House	310,885
Information Studies	111,345
Innis College	111,612
Institute for Christian Studies	3,000
Institute of Child Study	1,046,039
Joseph L Rotman School of Management	5,081,195
Law	3,071,845
Leslie Dan Faculty of Pharmacy	1,820,022
Library**	12,618,446
Medical Alumni Association	2,300
Medicine	12,745,541
Music	1,000,831
New College	231,256
Nursing	831,896
OISE/UT	126,077
Physical Education & Health	805,247
School of Continuing Studies	1,625
Social Work	781,290
Student Affairs	3,672,339
Student Services	409
Toronto School of Theology	15,385
Transitional Year Programme	810,394
Trinity College	4,145,994
U of T at Mississauga	4,660,158
U of T at Scarborough	4,179,308
University College	3,271,397
University of St Michael's College	2,512,498
UTS	612,324
Victoria College***	4,833,052
Woodsworth College	271,897
<b>Total</b>	<b>101,692,652</b>

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

\*\*Library total includes  
\$9,129,005 Gifts in Kind

\*\*\* Victoria University  
includes Emmanuel  
College

## Appendix C

### ANNUAL FUNDRAISING ACHIEVEMENT - DONORS BY SECTOR 2005-2006

<b>Donor Group</b>	<b>Donor Count</b>	<b>% of Total</b>
Alumni	26,495	83.64 %
Friends	4,242	13.39 %
Corporations	610	1.93 %
Organizations & Foundations	325	1.03 %
Other	5	0.02 %
<b>Total</b>	<b>31,677</b>	

## Appendix D

### ANNUAL FUNDRAISING ACHIEVEMENT - DONORS BY SECTOR 2005-2006

<b>Donor Group</b>	<b>Pledge Total</b>	<b>% of Total</b>
Alumni	\$42,025,655	41.3 %
Friends	\$24,215,553	23.8 %
Corporations	\$13,831,070	13.6 %
Organizations & Foundations	\$18,570,374	18.3 %
Other	\$3,050,000	3.0 %
<b>Total</b>	<b>\$101,692,652</b>	

# Appendix E

## RECONCILIATION BETWEEN UNIVERSITY OF TORONTO AUDITED FINANCIAL STATEMENTS & ANNUAL CASH AND GIFTS RECEIVED

**May 1, 2005 - April 30, 2006**

### Audited Financial Statements:

Monetary Gifts	\$68,960,052	
Gifts-in-kind	6,009,492	<b>\$74,969,544</b>

### Cash and Gifts Received:\*

#### University of Toronto:

Monetary Gifts	68,960,052	
Gifts-in-kind	6,009,492	74,969,544

#### Federated Universities:\*

University of St. Michael's College	2,153,374	
Victoria University	4,774,319	
University of Trinity College	4,332,315	11,260,009

#### Other Affiliated Institutions:\*\*

Massey College	120,000	
University of Toronto Schools (UTS)	615,823	
Fields Institute	75,550	811,373

**Other donations\*\*\*** 1,356,371

**Total** **\$88,397,297**

The above figures include payments on campaign pledges.

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

\*\* These figures include donations received by the University of Toronto on behalf of UTS and Fields Institute.

\*\*\* These figures include the following donations received by University but not counted in the audited financial statements:

City of Mississauga	\$700,000
Foundation gift to Faculty of Law	374,300
Payment made directly to student in Hong Kong	251,521
TST donations	28,050
Miscellaneous	2,500



## Appendix F

### CURRENT ALUMNI COUNTS

<b>Group</b>	<b>Total Count</b>	<b>Living Count</b>
Graduate	430,549	380,190
Alumnus/a (non-graduate)	39,315	23,218
Diploma/Certificate Holder	20,876	16,556
<b>Totals</b>	<b>490,740</b>	<b>419,964</b>

### ALUMNI COUNTS BY PRIMARY GRADUATION YEAR DECADE

<b>Graduation Decade</b>	<b>Total Count</b>	<b>Living Count</b>
2000	71,115	71,062
1990	88,850	88,434
1980	78,134	77,240
1970	71,520	69,337
1960	33,510	30,878
1950	24,255	18,654
1940	18,498	10,098
1930	11,745	2,587
1920	8,020	547
1910	4,310	154
1900	2,893	82

# Appendix G

## DUA ALUMNI PROGRAMMING AND UNIVERSITY-WIDE REGIONAL PROGRAMMING

### May 2005

New York City, NY	Cello Recital	May 15
Hong Kong	UTAA (HK) May Happy Hour	May 20
Victoria, BC	Annual General Meeting	May 24
Washington, DC	Smithsonian Event	May 25 – 26
Hong Kong	UTAA (HK) Charity Event	May 28
Toronto, ON	Convocation gift distribution	end May-early June

### June 2005

Hong Kong	U of T/UBC Alumni Dragon Boat Race	June 1
Toronto, ON	SHAKER – Spring Reunion Edition	June 2
Minneapolis, MN	All Canadian Alumni Reception	June 9
Hong Kong	Woodsworth Summer Prog Alumni Walk	June 19
Vancouver, BC	Annual SOAR Barbecue	June 25

### July 2005

Victoria, BC	All University Alumni Picnic	July 9
Hong Kong	UTAA (HK) July Happy Hour	July 15
Hong Kong	UTAA (HK) Summer Boat Cruise	July 17
Hong Kong	VIC Alumni Lunch with Prof. Paul Gooch	July 21
Hong Kong	U of T Bound Reception	July 23

### August 2005

Ottawa, ON	U of T Bound Reception	August 2
Vancouver, BC	U of T Bound Reception	August 4
Seoul, South Korea	U of T Bound Reception	August 6
Guangzhou, China	U of T Bound Reception	August 11
Singapore	U of T Bound Reception	August 13
Toronto, ON	Rogers Cup Tennis	August 18
Toronto, ON	Movie Night on Back Campus	August 18
Hong Kong	UTAA (HK) August Happy Hour	August 19
Shanghai, China	U of T Bound Reception	August 21
Toronto, ON	SHAKER – Tropical Oasis	August 24

### September 2005

Hong Kong	UTAA (HK) September Happy Hour	September 16
New York City, NY	U of T & McGill Alumni Baseball Game	September 25
New York City, NY	All Canadian Alumni Reception	September 29

**October 2005**

Seattle, WA	6 <sup>th</sup> Annual Canada Gala	October 7
Toronto, ON	SHAKER – West	October 12
Shanghai, China	U of T Shanghai Alumni Happy Hour	October 21
Hong Kong	UTAA (HK) Bi-annual Meeting and Social	October 21
London, UK	Alumni Reception	October 26

**November 2005**

Toronto, ON	NHL Legends Game	November 6
Chicago, IL	All Canadian Alumni Reception	November 9
Toronto, ON	Convocation Gift Distribution	Nov 14 - 17
Toronto, ON	SHAKER – Anniversary Event	November 24
Hong Kong	U of T (HK) Foundation AGM	November 30
Toronto, ON	Toronto Raptors Basketball	various in Nov

**December 2005**

Beijing, China	U of T Open House at Canadian Embassy	December 1
Victoria, BC	Annual Seasonal Celebration	December 1
Shanghai, China	Alumni Reception	December 8
Hong Kong	U of T Engineering Reception	December 12

**January 2006**

Hong Kong	UTAA (HK) Annual Dinner	January 15
Miami, Florida	Alumni Reception	January 31

**February 2006**

Beijing, China	U of T Beijing Happy Hour	February 22
Hong Kong	UTAA (HK) Bowling Night	February 23

**March 2006**

Hong Kong	UTAA (HK) Happy Hour	March 17
Toronto, ON	SHAKER – Turn it up	March 23

**April 2006**

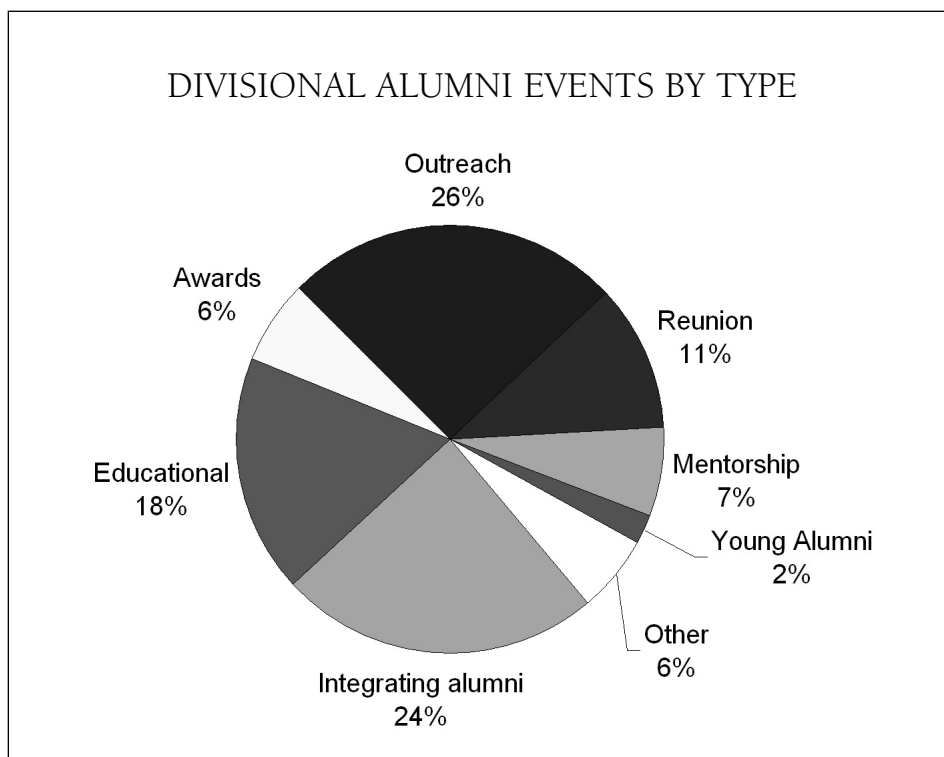
Boston, MA	All University Alumni Reception	April 4
Washington, DC	All Canadian Alumni Reception	April 8
Hong Kong	Hong Kong Graduation Ceremony	April 9
Hong Kong	Alumni Reception	April 10
Singapore	Alumni Reception	April 11
Shanghai, China	Alumni Reception	April 12

## Appendix H

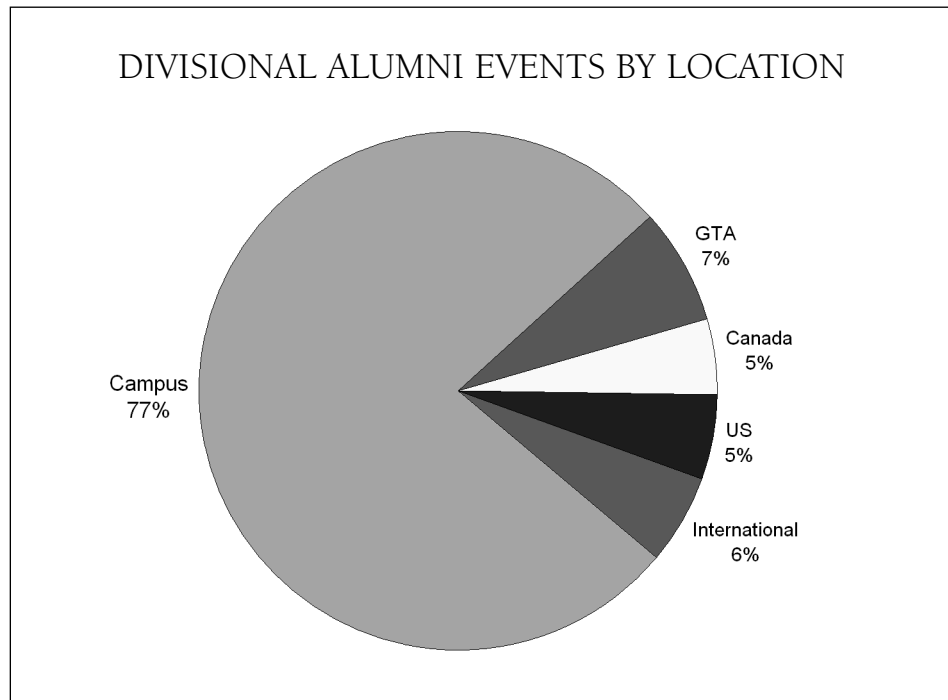
AFFINITY & MARKETING PROGRAMS -  
NUMBER OF CLIENT ACCOUNTS AS OF DECEMBER 31, 2005

Partner	Affinity program	Client account count
Chappell Studios	Graduation Photography	3,589
Clearsight Wealth Management	Wealth Management	240
Manulife Financial	Term Life / EHC Insurance	6,457
MBNA Canada Bank	U of T MasterCard	34,182
TD Meloche Monnex	Home / Auto Insurance	21,131
Various	U of T Alumni Travel Program	355
<b>Total:</b>		<b>65,954</b>

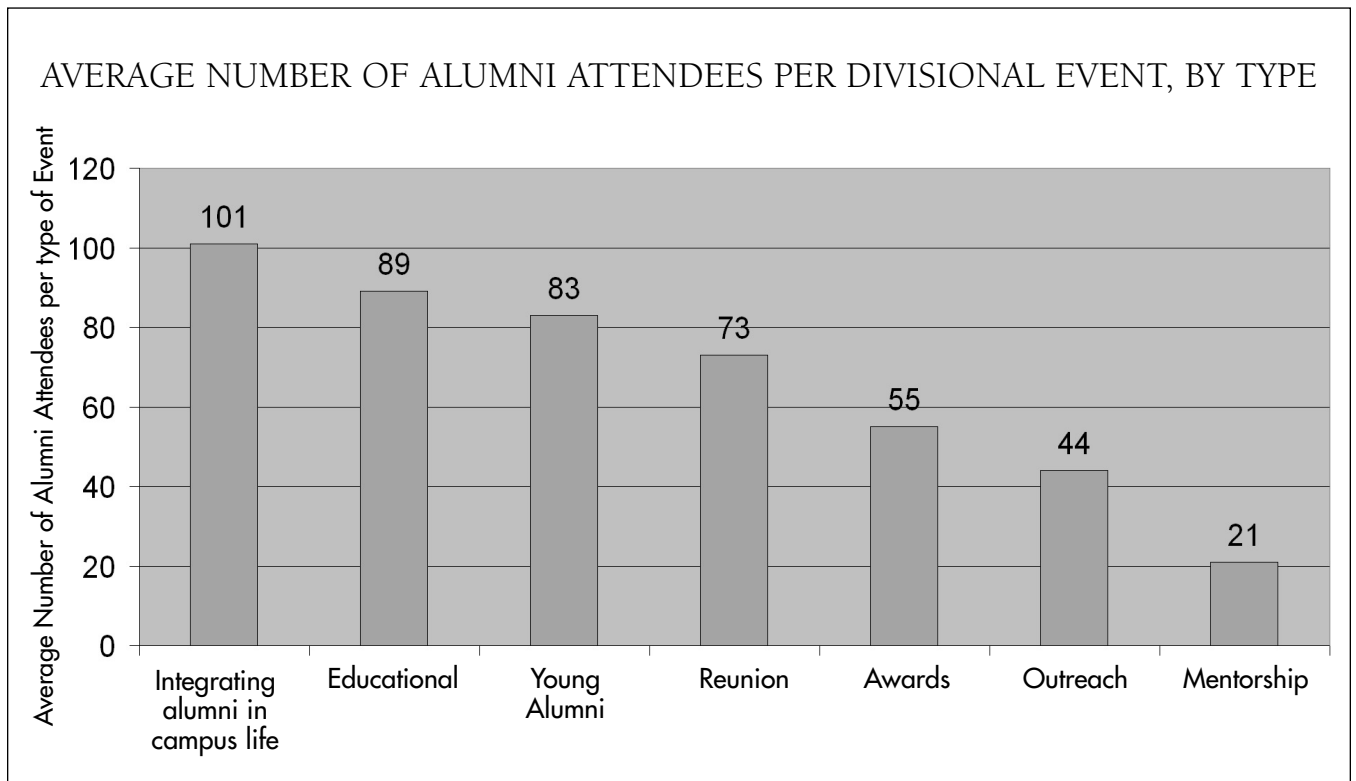
## Appendix I



## Appendix J



## Appendix K



# Appendix L

## DIVISIONAL ALUMNI COMMUNICATIONS

College/Faculty	Publication Name	Medium	Audience	Distribution	Frequency
A&S	idea&s	Print	Alumni	4000	Semiannually
A&S (Chemistry)	Distillations	Print	Alumni	2500	Semiannually
A&S (Commerce)	Alumni e-network	Electronic	Alumni		
A&S (Economics)	Tradeoffs	Print	Alumni	3000	Annually
A&S (Fine Art)	Events, Updates	Electronic			
A&S (Geography)	Geoplan	Print	Alumni & Friends	5000	Semiannually
A&S (Physics)	Events, Updates	Electronic			
A&S (Physics)	Interactions	Print	Alumni	2700	Annually
A&S (Political Science)	Discourse	Print	Alumni	3500	Semiannually
Dentistry	Alumni & Friends Newsletter	Electronic	Alumni & Friends	2000	3x per year
Dentistry	Alumni Today Magazine	Print	Alumni	7500	3x per year
Engineering	Interfaces newsletter	Print	Alumni, Faculty & Staff, Students	5000	Semiannually
Engineering	Civilian newsletter	Print	Alumni, Faculty & Staff, Students	6000	Semiannually
Engineering	Skulematters	Print	Alumni & Friends	30000	Semiannually
Innis	E-vite	Electronic	Alumni	1338	Once
Innis	Newsletter	Print	Alumni	4650	Annually
Law	e-Bulletin (listing of events)	Electronic	Alumni	5124	Monthly
Law	e-Newsletter	Electronic	Alumni	5124	Semiannually

**DUA • Report to The Business Board • 2005-2006**

College/Faculty	Publication Name	Medium	Audience	Distribution	Frequency
Law	Holiday Cards	Print	Donors, Prospects & Friends	300	Annually
Law	Letter from Dean to Alumni	Print	Alumni	6200	Annually
Law	Invitation from the Law Alumni Association to general meeting	Print	Alumni	6200	Annually
Law	Nexus	Print	Alumni	6200	Semiannually
Medicine	Med.E.Mail (communication from Office of the Dean)	Electronic	Alumni	1000	Bi-weekly
Medicine	Annual Report and Strategic Report	Postcard link	Alumni	500	Annually
Medicine	BMCAA Alumni News (Biomedical Communications)	Print	Alumni	130	Semiannually
Medicine	PhysioNEWS	Print	Alumni	360	Semiannually
Medicine	Ophthalmic News	Print	Alumni	400	Semiannually
Medicine	Surgical Spotlight	Print	Alumni	500	Quarterly
Medicine	Look Who's Talking: S-LP Alumni Association	Print	Alumni	550	Annually
Medicine	HPME Connection: News for Alumni and Friends	Print	Alumni	1000	Semiannually
Medicine	Public Health Sciences Alumni Association	Print	Alumni	1500	Annually
Medicine	Update, PT & OT Alumni Association	Print	Alumni	5000	Semiannually
Medicine	MAA Matters	Print	Alumni	10000	Semiannually
Medicine	UToronto Medicine	Print	Alumni	18000	3x per year
Music	Noteworthy Alumni Newsletter	Print		3979	Annually
New	New College Alumni & Friends	Print	Alumni & Friends	12000	Annually
Nursing	Vital Connections Newsletter	Print	Alumni	5000	Semiannually
Pharmacy	Dean's Newsletter	Print	Alumni		Semiannually

# U N I V E R S I T Y   O F   T O R O N T O

College/Faculty	Publication Name	Medium	Audience	Distribution	Frequency
PHE	E-mail updates	Electronic	Alumni (specific sports)		Weekly
PHE	T-Holder Newsletter	Print	T-Holders/Alumni	7000	Semiannually
PHE	Pursuit	Print	Alumni	10000	Semiannually
Rotman	All Alumni E-mail	Electronic	Alumni	4100	4x - 6x per year
Rotman	e-Newsletter	Electronic	Alumni	4100	Quarterly
Rotman	Various Mailings	Print	Alumni	7400	Annually
Rotman	Investor's Report	Print	Alumni	7400	Annually
Rotman	Rotman Magazine	Print	Alumni	18000	3x per year
St. Michael's	Invitations	Electronic	Alumni	9059	Semiannually
St. Michael's	Donor Report	Print	Alumni	24000	Annually
St. Michael's	President's Appeal	Print	Alumni	24000	Annually
St. Michael's	Alumni Magazine	Print	Alumni	24000	Semiannually
St. Michael's	Christmas Cards	Print	PC, CC & Heritage Donors		Annually
Trinity	e-Trinity	Electronic	Alumni	5000	Quarterly
Trinity	Trinity Magazine	Print	Alumni & Friends	13000	3x per year
Trinity	Annual Fund Brochure	Print	Alumni	13000	Annually
UTM	e-Newsletter	Electronic	Alumni	4500	Quarterly
UTM	Magazine	Print			Semiannually
UTSC	UTSC e-Note	Electronic	Alumni	6700	Quarterly
Victoria	E-Newsletter	Electronic	Alumni	6000	Semiannually
Victoria	Emmanuel College Newsletter	Print	Alumni	13000	Semiannually
Victoria	VicReport	Print	Alumni, Friends, 4th yr Students	23000	3x per year
Victoria	Spring Reunion Newsletter	Print	Alumni		Annually
Woodsworth	e-Newsletter	Electronic	Alumni	3000	Semiannually
Woodsworth	Newsletter	Print	Alumni	13000	3x per year



## Appendix M

### AWARDS RECEIVED 2005-2006

#### CASE Circle of Excellence

- SILVER Individual Photography, Pier Giorgio di Cicco:  
*University of Toronto Magazine* ("Seeking the Divine", Summer 2005)
- Individual Photography, Lisa Steele and Kim Tomczak:  
*University of Toronto Magazine* (Summer 2005)

#### CASE District II Accolades Awards

- GOLD Video/CD-ROM/DVD: Annual Fund, flash e-solicitation
- SILVER Special Event/Event Series: for SHAKER alumni event series
- SILVER Colour Photography, Dr. Joseph MacInnis:  
*University of Toronto Magazine* ("Breathing Underwater", Winter 2005)
- SILVER Illustration: *University of Toronto Magazine* ("A Cleaner Future", Summer 2005)
- SILVER Excellence in News Writing (Research, Medicine and Science Category)
- BRONZE Best Article: *University of Toronto Magazine* ("Why Good People Do Bad Things")
- BRONZE Black and White Photography, Pier Giorgio di Cicco :  
*University of Toronto Magazine* ("Seeking the Divine", Summer 2005)

#### CCAE Prix d'Excellence

- GOLD Best Newspaper: The Bulletin
- SILVER Best Program in Alumni Relations: for SHAKER alumni event series
- SILVER Best Article: *University of Toronto Magazine* ("Seeking the Divine", Summer 2005)
- SILVER Best Photograph: *University of Toronto Magazine*  
(Lisa Steele and Kim Tomczak, Summer 2005)
- BRONZE Best Magazine: *University of Toronto Magazine*
- BRONZE Best Article: *University of Toronto Magazine* ("Miracle at Sick Kids", Summer 2005))
- BRONZE Best Photograph, Pier Giorgio di Cicco: *University of Toronto Magazine* (Summer 2005)

## Appendix N

### UTAA BOARD OF DIRECTORS

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President-Elect	Mr. Harvey Botting
Past-President	Mr. Brian Burchell
Vice-President, Governance	Mr. Paul Cadario
Treasurer	Mr. Carl Mitchell
Secretary	Ms. Hana Zalzal
Directors	Ms. Wendy M. Cecil (ex-officio) Mr. Tony Clement Ms. Rivi Frankle (ex-officio) Mr. Frederick Kan Ms. Eira M. Thomas Ms. Evelyn Wong

## Appendix O

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Mr. Timothy Reid  
Ms. Marvi H. Ricker  
Mr. Stephen C. Smith  
Miss Maureen J. Somerville  
Ms. B. Elizabeth Vosburgh

## **Appendix P** REGIONAL ALUMNI CONTACTS

### **ACROSS CANADA**

Barrie, Ontario

Donald Dowds (BASc 1953)

Halifax, Nova Scotia

Bruce Russell (JD 1979)

Montreal, Quebec

Susan Darlington (BLS 1970)

Muskoka/Bracebridge, Ontario

Catherine Cherry (MEd 1984 OISE)

Newfoundland

Ashley Morton (BASc 2003)

Vancouver, British Columbia

Ian O'Briain (BA 1989 UTM)

Victoria, British Columbia

Beverley Straub Watkins (BA 1967 VIC)

Windsor

Jo Anne Foote (HBA 1996 UTSC)

Winnipeg, Manitoba

Douglas Hutchings (BA 1950 VIC)

### **ACROSS THE UNITED STATES**

Atlanta, Georgia

Philip Roberts (BASc 1990) and

Nancy Bock (BA 1987 UTSC)

Chicago, Illinois

David Frankel (BA 1994 UC)

Denver, Colorado

Brian Matsumoto (BA 1977 UTSC)

Florida

Ken Evans (BASc 1946)

New York, New York

Gary Kaufman

Northern California

Berkeley area:

Kit Soo (HBSc 1995 UTSC)

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 OISE)

Tucson, Arizona

David Loynd (BCom 1984 WDW)

Washington, D.C.

Paul Cadario (BASc 1973) and

Jean van der Tak (BA 1948 UC)

### **AROUND THE WORLD**

#### **ARGENTINA**

Gustavo Rochwerger (MEng 1997)

#### **AUSTRALIA:**

*Brisbane*

Elizabeth Parker

(BA 1973 WDW, MSW 1975, DEd 1991)

*Melbourne*

Judith Walker (BSW 1964)

*Sydney*

Natalie Lam (HBA UC 2004)

BERMUDA

Richard Butterfield (BA 1951 TRIN)

CHINA:

*Hong Kong*

Hong Kong Alumni President  
Gigi Pang (BA 1993 UTSC)

*Beijing*

Kevin Leung (BASc 1998)

*Shanghai*

Queenie Lo (HBSc 1999 UC, MA 2002)

DUBAI

Aseem Aziz (MASc 1990)

COSTA RICA

Francis James (BA 1997 SMC)

FINLAND

D'Arcy Salzmänn (BA 1995 UC)

FRANCE

Mark Adam (BA 1985) and  
Jens Van Vliet (BMus 1985, BEd 1986)

GERMANY

Mary Kwok (HBSc 1995 WDW)

HAWAII

Michael Brockert (MA 1989)

ISRAEL

Stephen Glazer (BA 1968 UC)

JAPAN

Shiro Kiyohara (BA 1960 UC) and  
Miki Tomoeda (BSc 1989 UC)

KOREA

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

MACAU

Fred KC Kan (BASc 1964, JD 1967)

MAURITIUS

Jerry Ng Tin Sze (BASc 2002)

MEXICO

John Anthony Gardner (BA 1991 TRIN, MA 1993) or  
Ian Jarvie (BA 1993 TRIN) or  
Louisa Peat O'Neil (BA 1975 WDW)

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)

SINGAPORE

BC Lee (MASc 1997) and  
Keff Tang (BSc 1986 UTSC) and  
Evelyn S. Wong (BSc 1972 NEW, MBA 1974, MIR  
1980)

SRI LANKA

Jean-Philippe Linteau (MSc 1996)

TRINIDAD

Anthony Smart (BA 1968 UC)

TURKEY

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

VIETNAM

Linh Phan (HBA 1996 INNIS)

## Appendix Q

UNIVERSITY OF TORONTO  
HONG KONG FOUNDATION

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Wong Yick-Ming

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Mr. William Wai Hoi Doo  
Dr. Anthony Ho  
Mrs. Daisy C. F. Ho  
Mrs. Patti Ho  
Mrs. Rita Liu  
Mr. Kenneth L. F. Lo  
Dr. Dexter Man

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Ms. Laetitia K. W. Yu  
Ms. Betty Yuen

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Ms. Rivi Frankle

### *Vice-President*

Mr. W. G. Tad Brown

## Appendix R

THE ASSOCIATES OF THE UNIVERSITY OF TORONTO, INC.

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Tad Brown, *Vice-President and Officer*  
Rivi Frankle, *Secretary and Officer*  
Gary Kaufman, *Treasurer*  
Ken Taylor, *Member*  
Bonnie Fuller, *Member*  
Ernest Goggio, *Member*

# Appendix S

## PRESIDENT'S INTERNATIONAL ALUMNI COUNCIL

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 Sheela Basrur  
 Mordechai Ben-Dat  
 W. Ian C. Binnie  
 Harvey Botting  
 Brian C. Burchell  
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 Melvin S. Cappe  
 Wendy M. Cecil  
 Agnes Chan Miling  
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 Michael J. Cobden  
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 Michael C. Deck  
 Lindsay Duffield  
 Kathryn Feldman  
 Patrick Y. B. Fung  
 Blake C. Goldring  
 Brian H. Greenspan  
 Daina I. Groskaufmanis

Alexander Himelfarb  
 Michael G. Ignatieff  
 Sandra L. Irving  
 Richard W. Ivey  
 Norman F. Jewison  
 F. Ross Johnson  
 Frederick K. C. Kan  
 Tae-Jin Kang  
 V. Maureen Kempston Darkes  
 Michael F. Kergin  
 Chao-Shiuan Liu  
 Theodore Roosevelt Malloch  
 Audrey M. MacLaughlin  
 Joseph A. Medjuck  
 Paul Martin Meyer  
 David R. Miller  
 Carl O. Mitchell  
 David Mulrone  
 Julie Payette  
 Gordon W. Perkin  
 John Polanyi

Poonam Puri  
 Ellen B. Roseman  
 Peter J. Sahlas  
 Susan Scace  
 Thomas H. Simpson  
 Anthony I. Smart  
 Bonnie Stern  
 Catherine S. Swift  
 Kenneth D. Taylor  
 Eira M. Thomas  
 Vaira Vike-Freiberga  
 Bruno J. Wall  
 Marni Weishofer  
 Evelyn S. Wong  
 Rosanna Wong  
 Janet Yale  
 Philip Y. K. Yeo  
 Hana Zalzal  
 Edward Zeng