



*U of T's next  
campaign*

Presented to Academic Board  
1 June 2011  
Prepared by University Advancement

# *Where are we now*

- I Quiet Phas
  - Workin wit academi colleague universit t establis fundin priorities goal
  - Plannin parameter o campaign suc a goa
  - Gatherin gi support
  - Recruitin leadershi
- Aimin at ubli Launc mid-fal
  - Announcement celebrator event an activitie
  - Broade alumni outreac
  - Testin a oa o \$1. billio t \$2. billion launche wit 40%+ i han

# *Where are we coming from*

- Previous campaign
  - Finished December 200
  - Goal began around \$250 to \$300 million; raised several times through campaign; closed at \$1 billion
  - Took U of T from < \$20m/yr to about \$100m/y

## Sinc

- Averaged \$140m/yr (\$163m/yr with philanthropic research grants)
- Recession: lingering impact
- Philanthropic recovery lagging economic recovery

# *What's different this time round?*

- Then
  - Central academic planning process
  - Large pool of donors and alumni largely untapped to that point
  - Major gift philanthropy in university sector relatively new
  - Little institutional competition
  - Largely centrally driven: relatively few “askers”
  - Started with “soft” goal of \$300 million with several rises before declaring \$1 billion



# *What's different this time round?*

- Now
  - Asynchronous academic planning process
  - Much more competitive environment
  - Donors expect more; more sophisticated
  - We are seeking a much larger goal
  - Need more people involve
  - Need more sophisticated teams and approaches
  - Need to broaden and deepen cultivation efforts across the board
  - Expanded role for academic leaders
  - Expanded role of volunteer leaders to extend reach, lift sights

# *What's different this time round*

- Motivations of donor are changing over time
- Approach to developing our cases for support and presentation of initiatives evolving as well



***TRANSFORMIN***  
*HEALTHCARE CAPACITY*

*CARLO FIDANI and th*  
*MISSISSAUGA ACADEMY OF MEDICIN*





*How does this affect  
planning for U of T's  
next campaign?*



# *Campaign models*

- Traditional model
  - Inventory of highest priority capital needs
    - Inventory of desired endowed faculty positions
  - Financial objective for student aid (merit, need graduate, undergraduate)
  - Objective for alumni participation rates
  - Objective for annual giving growth

# *Campaign models*

- Thematic approach: looks for the most exciting and promising intersections of divisional academic plans with institutional strategy, and with ideas of meaningful change and consequence

# *Campaign framework*

- Defined a conceptual and organizational framework for campaign's academic foundation
- Result of extensive and ongoing consultations with principals, deans, and advancement leaders in all divisions
- Feb 2010 Campaign Seminars for Academic Leaders (P&D and PDAD&C members)
- Sept 2010 Retreat with P&D
- Nov 2011 session with PDAD&C
- Ongoing consultations with academic leaders



# *Campaign framework*

- First, broad themes provide narrative context for U of T's global leadership and aspirations
- Second, specific marquee initiatives/big ideas rise to the fore as featured priorities in a University-wide case, where there can be a legitimate claim to excellence, leadership in a global context.
- Third a special focus on student life and learning
- Fourth, cross-university matching initiatives for new faculty, financial aid, possibly new alumni

# *Campaign framework*

## Building Global Leadership Capaci

### Meeting Global Challenge

- Knowledge and Meaning
- Invention and Innovation
- Human Development and Health
- Energy, Sustainability and the Environment
- Successful Societies

### Preparing Global Citizen

- Access and Opportunity
- Global Fluency
- Shaping the U of T Experienc

# *Campaign framework*

- A campaign planning framework that speaks to where major philanthropy is headed:
  - A thematic framework, aligning biggest ideas with areas of greatest global leadership and potential often cross-divisional in nature
  - Realizes that complex problems require solutions that cross traditional boundaries of disciplines and borders and often lever multiple partnerships
  - Policy/issue driven donors seeking major, measurable multiplying impact on the societal issues they are passionate about.



# *Campaign Steering Committee*

- Advising on goal and financial capacity  
leadership recruitment, valuations, timing  
external case for support

# *Building momentum*

- Moving on several fronts simultaneously
  - Finalizing academic plans, priorities, divisional goals
  - Defining the case, brand and marketing platform
  - Testing the case
  - Recruiting Campaign leadership
  - Validating Gifts from Leadership donors
- All build momentum, anticipation, involvement; create a compelling, winning platform; inculcate belief, confidence

# *Why a U of T campaign*

To have meaningful impact on the defining challenges of the 21st century

- To develop the talent, leadership and answers for these challenges
- To drive the University's leadership in a global context in key areas of reputational strength and consequence
- To contribute meaningfully to Canada's innovation agenda and to the betterment of local, national and international communities
- To develop leaders with global fluency and experience
- To build the next generation of faculty leadership
- To strengthen access and opportunity



# *Vision for U of T's next campaign*

- Establish U of T as a primary destination for philanthropic volunteer and advancement leadership
- Achieve renewed and reinvigorated sense of pride and ownership among a broad, diversified base of alumni
- Broaden and strengthen awareness of the U of T brand along an axis of differentiation and excellence.
- Transform student engagement with alumni and as future alumni
- Improve our resource base, and reduce existing shortfalls in faculty and facilities, deliver tangible gains in student life and learning
- Achieve sustainable annual results of \$200 million+ annually; secure 150,000+ gifts; 100,000+ alumni gifts



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