



**FOR ENDORSEMENT
AND FORWARDING**

PUBLIC

CLOSED SESSION

TO: Executive Committee

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DATE: October 12, 2021 for October 19, 2021

AGENDA ITEM: 4 (b)

ITEM IDENTIFICATION:

Bicentennial Campaign Priorities

JURISDICTIONAL INFORMATION:

Section 4.8 of the terms of reference of the Planning and Budget Committee provide for the following:

The Committee recommends to the Academic Board, for concurrence with the Business Board, on the ranking of priorities for major fundraising campaigns.

Section 5.1 of the terms of reference of the Academic Board note that ‘*academic priorities for fundraising*’ are within the Board’s responsibility itself and/or one of its Standing Committees [Planning and Budget Committee] with these requiring Governing Council approval.

Section 5.3.1 of the terms of reference of the Academic Board provide for the Academic Board to recommend to the Governing Council for approval, the Planning and Budget Committee’s recommendation of the priorities for fundraising.

GOVERNANCE PATH:

Campaign Priorities

- UTSC Academic Affairs Committee [for information] (September 13, 2021)
- UTM Academic Affairs Committee [for information] (September 14, 2021)
- UTM Campus Council [for information] (October 6, 2021)
- UTSC Campus Council [for information] (October 7, 2021)

- Planning and Budget Committee [for recommendation] (September 23, 2021)
- Academic Board [for recommendation] (October 12, 2021)
- Business Board [for recommendation] (October 5, 2021)
- **Executive Committee [for endorsement and forwarding] (October 19, 2021)**
- Governing Council [for approval] (October 28, 2021)

PREVIOUS ACTION TAKEN:

Annually, the Division of University Advancement (DUA) reports on the fundraising activities and success of the previous year to the Business Board. Quarterly, the DUA reports on all gifts received with a value of \$250,000 or greater to Business Board and Academic Board.

A similar package of campaign plans and priorities were approved in 2011, prior to the launch of Boundless campaign, and also in 1997, prior to the launch of The Campaign for the University of Toronto (also commonly referred to as the Great Minds for A Great Future campaign).

The Overview of Campaign Plans and the Campaign Priorities Summary for the Boundless campaign were considered by the Business Board at its meeting of [September 26, 2011](#) and recommended for approval by the Governing Council. The motion was as follows:

BE IT RECOMMENDED TO THE GOVERNING COUNCIL

THAT (i) the “Overview of Campaign Plans” and (ii) the “Campaign Priorities Summary as of September 2, 2011”, copies of which are included in Appendices A and B hereto, be approved as the planning framework for the University’s fundraising campaign, subject to the concurrence of Academic Board.

The Campaign Priorities Summary for the Boundless campaign was considered by the Academic Board at its meeting of [October 6, 2011](#) and recommended for approval by the Governing Council. The motion was as follows:

BE IT RECOMMENDED TO THE GOVERNING COUNCIL

THAT the Campaign Priorities Summary, as described in the letter from the Provost to the Chair dated September 2, 2011, and attached as Appendix A, be approved as the planning framework for the University’s fundraising campaign.

The motion that went to the Governing Council at its meeting of [October 27, 2011](#) was as follows:

BE IT RESOLVED

THAT (i) the ‘Overview of Campaign Plans’ and (ii) the “Campaign Priorities Summary as of September 2, 2011”, copies of which are Appendices “A” and “B” to Professor Misak’s and Mr. Palmer’s memorandum dated September 19, 2011, be approved as the planning framework for the University’s fundraising campaign.

HIGHLIGHTS:

The Summary of Approved Academic Funding Priorities (Campaign Priorities Summary) is being presented to **Academic Board** for approval as the planning framework for the University's fundraising campaign at its meeting of October 12, 2021. It provides a summary of the academic funding priorities approved by the Provost arising from each division's approved academic plan. The process of developing this Summary relies on long-standing policies and principles:

- The University only solicits and accepts gifts for academic priorities that are approved by the Provost at the recommendation of Principals and Deans, in accordance with established procedures for academic planning and academic initiatives.
- The academic priorities are established by the divisions through their academic planning processes in concert with the Provost's Office. Each division's academic plans have in turn been approved by the relevant Faculty Council and presented to University governance for information and feedback. And each year, academic divisions participate in Academic Budget Reviews focused on the resourcing of those academic plans.
- All fundraising is conducted in accordance with the *Provostial Guidelines on Donations*, which were first established in 1998 and have recently been updated in 2021. These *Guidelines* reflect a robust commitment to fundamental academic principles that shape our relationships with donors. They confirm the commitment of the University of Toronto to continued productive partnerships with donors within a framework defined by the University's academic mission and its fundamental values.
- The Overview of Campaign Plans is being presented to the Business Board for approval as the planning framework for the University's fundraising campaign at its meeting of October 5, 2021. It provides a thematic breakdown of the approved academic funding priorities into the areas of:
 - Student Programming and Financial Aid
 - Faculty Funding
 - Research and Program Funding
 - Capital Priorities
 - Institutional Strategic Initiatives.
- The Overview of Campaign Plans also provides context for the process by which academic funding priorities have been developed and approved, and describes the intensive campaign planning process, and support received to date. Key highlights include:
 - Intensive planning for the campaign began with the completion of the Boundless campaign on December 31, 2018. This new planning phase has entailed extensive consultations with academic leadership through multiple rounds of intensive individual consultations with the President, Vice-President and Provost, Principals

and Deans, as well as through consultations with the Principals & Deans Advancement Advisory Group. Divisions have also undertaken extensive consultations with the academic directors, chairs, and other leaders in their respective divisions as part of their academic planning processes. Planning has also involved close consultation with the Vice-President and Provost, and the Vice-President Research, Innovation, and Strategic Initiatives, as well as regular updates to the Tri-Campus Vice-Presidents (TVP).

- With twin goals encompassing donations and alumni engagement, the Campaign for the University of Toronto is unprecedented in Canada for its breadth and ambition. The Campaign will highlight the University's leadership and excellence in a broad range of areas essential to its teaching and research mission. It will accelerate the University's impact on some of today's most pressing issues and inspire a new generation of students and alumni to value a life-long mutually beneficial association with their alma mater. It will also enhance the University's commitment to equity, diversity, and inclusion, and strengthen its commitment to the pursuit of excellence, accessibility, and an engaged, caring community.
- The Campaign builds on collegial processes of academic priority-setting and is an important way to resource the incredible vision of our researchers and teachers as well as support our students. The Campaign will help strengthen the University of Toronto's ability to provide an outstanding education and student experience, ignite life-changing research and innovation, and promote social wellbeing, prosperity and vitality in our communities.

RECOMMENDATION:

Be It Resolved

THAT the following recommendation be endorsed and forwarded to the Governing Council

THAT (i) the *Summary of Approved Academic Priorities (Campaign Priorities Summary)*, as of August 20, 2021, and (ii) the *Overview of Campaign Plans*, copies of which are appended to the Vice-President, Advancement, Mr. David Palmer's memorandum dated October 12, 2021, be approved as the planning framework for the University's fundraising campaign.

DOCUMENTATION PROVIDED:

- Appendix A: Summary of Approved Academic Funding Priorities (Campaign Priorities Summary), approved by the Provost as of August 20, 2021
- Appendix B: Overview of Campaign Plans

Appendix A: Summary of Approved Academic Funding Priorities (Campaign Priorities Summary)
Academic Funding Priorities approved by the Provost as of August 20, 2021

The total value of identified academic funding priorities intentionally exceeds the fundraising goal of \$4 billion, recognizing that in a typical campaign, it is not possible to attract support for every one of the many hundreds of priorities established. It is also anticipated that as the campaign progresses, new academic priorities will naturally emerge from ongoing academic and strategic plans—particularly when new Principals or Deans are appointed and initiate new cycles of academic planning.

	FACULTY FUNDING	STUDENT PROGRAMMING AND FINANCIAL AID	RESEARCH AND PROGRAM FUNDING	CAPITAL PROJECTS ¹	TOTAL ALL FUNDING
ST. GEORGE					
Dalla Lana School of Public Health	148,000,000	39,015,000	80,427,000	1,000,000	268,442,000
Factor-Inwentash Faculty of Social Work	26,000,000	22,000,000	36,860,000	-	84,860,000
Faculty of Applied Science and Engineering	231,000,000	393,750,000	238,500,000	125,885,000	989,135,000
Faculty of Arts and Science	100,000,000	200,000,000	430,200,000	250,000,000	980,200,000
Faculty of Dentistry	28,000,000	10,800,000	6,750,000	37,000,000	82,550,000
Faculty of Information	1,500,000	3,000,000	1,000,000	4,500,000	10,000,000
Faculty of Kinesiology and Physical Education	11,550,000	8,650,000	16,950,000	13,000,000	50,150,000
Faculty of Law	43,000,000	70,000,000	63,500,000	5,000,000	181,500,000
Faculty of Music - <i>interim (pending new academic plan)</i>	44,000,000	52,750,000	20,480,000	82,500,000	199,730,000
Hart House	4,000,000	-	7,000,000	7,000,000	18,000,000
Innis College	50,000	1,300,000	800,000	10,000,000	12,150,000
John H. Daniels Faculty of Architecture, Landscape and Design - <i>interim (pending new academic plan)</i>	60,925,000	24,150,000	32,670,000	19,500,000	137,245,000
Joseph L. Rotman School of Management	24,175,000	122,700,000	93,100,000	31,250,000	271,225,000
Lawrence S. Bloomberg Faculty of Nursing	21,000,000	5,000,000	20,000,000	3,375,000	49,375,000
Leslie Dan Faculty of Pharmacy	30,000,000	12,975,000	14,300,000	4,000,000	61,275,000
New College	18,500,000	3,850,000	5,375,000	350,000	28,075,000
Ontario Institute for Studies in Education (OISE) - <i>interim (pending new academic plan)</i>	5,000,000	2,000,000	8,200,000	3,000,000	18,200,000
School of Continuing Studies	-	4,000,000	-	-	4,000,000
Temerty Faculty of Medicine	340,000,000	340,000,000	420,000,000	110,000,000	1,210,000,000
University College	16,000,000	13,500,000	18,000,000	11,100,000	58,600,000
University of Toronto Libraries	22,000,000	5,000,000	22,000,000	28,000,000	77,000,000
Woodsworth College	3,500,000	3,000,000	-	6,200,000	12,700,000
SUBTOTAL, DIVISIONS	1,178,200,000	1,337,440,000	1,536,112,000	752,660,000	4,804,412,000
UNIVERSITY OF TORONTO MISSISSAUGA	52,000,000	24,000,000	18,000,000	22,500,000	116,500,000
UNIVERSITY OF TORONTO SCARBOROUGH	59,000,000	11,000,000	27,000,000	109,750,000	206,750,000
FEDERATED UNIVERSITIES²					
Trinity College	-	7,000,000	8,000,000	25,000,000	40,000,000
University of St. Michael's College	15,000,000	10,000,000	20,000,000	30,000,000	75,000,000
Victoria University	10,000,000	20,000,000	15,000,000	35,000,000	80,000,000
SUBTOTAL, FEDERATED UNIVERSITIES & OTHER ENTITIES	25,000,000	37,000,000	43,000,000	90,000,000	195,000,000
TOTAL ACROSS THE UNIVERSITY	1,314,200,000	1,409,440,000	1,624,112,000	974,910,000	5,322,662,000

¹ Amounts associated with capital projects are preliminary and include funding required from private and other sources of support.

² Academic priorities of the Federated Universities do not require Provostial approval, however their approved academic funding priorities are identified through their own rigorous academic planning, approvals, and governance processes.

Appendix B

Overview of Campaign Plans

Introduction

The University of Toronto is currently in the initial quiet phase of a comprehensive, university-wide campaign. Designed to assist the University's divisions in achieving key components of their academic plans by securing alumni engagement and philanthropic support for their approved academic priorities, the campaign will assist the University of Toronto in strengthening its position as one of the world's leading universities.

The University's previous campaign, *Boundless*, launched publicly in 2011 with a \$2 billion goal, and concluded in December 2018 with more than \$2.64 billion raised in private support. *Boundless* helped the University of Toronto to strengthen its excellence, global leadership, and impact in a host of dimensions, and to improve its standing among the top ranks of universities worldwide.

For the first time in our history, the University's new campaign will include a public alumni engagement goal along with a public fundraising goal. Expected to launch in the late fall of 2021, the University's new campaign will raise \$4 billion in donations and engage 225,000 unique alumni in 1 million instances of engagement (including volunteer involvement, mentorship, giving, and event participation) over the course of the campaign. The campaign will involve every division and program on the University's three campuses, as well as joint initiatives with the University's affiliated hospitals. The campaign is intended to improve the University's resource base, generate new levels of private and public support, and broaden and diversify the base of engaged alumni, friends, and donors.

The campaign will also advance a wide range of important divisional and University-wide priorities that drive meaningful change and bring a comprehensive approach to solving complex social, economic and health issues. These include some of the biggest challenges facing our city and country as we rebuild from the COVID-19 pandemic and take on climate change, inequity, and mass technological disruption. The campaign will also feature teaching, research, and programmatic initiatives that support inclusive excellence, foster a sense of belonging, and prioritize the needs of underrepresented and equity-deserving communities. Initiatives will proactively address equity, inclusion, anti-Black racism, and Indigeneity including recommendations from the Report of the University of Toronto Anti-Black Racism Task Force and *Answering the Call: Wecheehetowin* - Final Report of the Steering Committee for the University of Toronto Response to the Truth and Reconciliation Commission of Canada.

Top students from across Canada and around the globe are drawn to U of T for many reasons. What sets this University apart are its commitment to inclusive excellence, equity, diversity, and access, at a scale and impact unrivalled among other top 20 universities. The campaign will support these strengths, while encouraging engagement and attracting support for students at every level, for our faculty, for our teaching and research mission, and for a wide range of approved academic priorities that have been identified by the University's academic divisions as integral to their success.

Planning

Intensive planning for the campaign began with the completion of the Boundless campaign on December 31, 2018. This new planning phase has entailed extensive consultations with academic leadership through multiple rounds of intensive individual consultations with the President, Vice-President and Provost, Principals and Deans, as well as through consultations with the Principals & Deans Advancement Advisory Group. Divisions have also undertaken extensive consultations with the academic directors, chairs, and other leaders in their respective divisions as part of their academic planning processes. Planning has also involved close consultation with the Vice-President and Provost, and the Vice-President Research, Innovation, and Strategic Initiatives, as well as regular updates to the Tri-Campus Vice-Presidents (TVP).

Additional consultations have taken place with divisions regarding their staffing and other infrastructure needs in preparation for the campaign. A Pre-Campaign Steering Committee of donors and volunteers, led by the President and Vice-President, Advancement was established in 2019 to advise on aspects of the campaign such as volunteer leadership and timelines.

University Advancement reports annually to Business Board on alumni engagement and fundraising performance as well as the performance of its programs. During the Boundless campaign, the Vice-President, Advancement provided regular updates on campaign progress in his presentations to Business Board. Since the conclusion of Boundless, the Vice-President has continued to report to Business Board annually on fundraising and alumni engagement results, and on plans for the new campaign.

Campaign Priorities

All fundraising at the University of Toronto is conducted in accordance with the *Provostial Guidelines on Donations*, which were first established in 1998 and were recently updated this year. These guidelines reflect a robust commitment to fundamental academic principles that shape our relationships with donors. They confirm the commitment of the University to continued productive partnerships with donors within a framework defined by the University's academic mission and its fundamental values.

The University only solicits and accepts gifts for academic priorities that are approved by the Provost at the recommendation of Principals and Deans, in accordance with established procedures for academic planning and academic initiatives. Academic priorities are established by the divisions through their cyclical academic planning processes. Divisional academic plans are approved by the relevant Faculty Council and

presented to University governance for information and feedback. And each year, academic divisions participate in Academic Budget Reviews with the Provost focused on the resourcing of those academic plans.

Accordingly, the attached *Summary of Approved Academic Funding Priorities* summarizes the total of individual academic priorities created by each academic division and approved by the Provost for inclusion in the Campaign. These are organized under the categories of faculty funding, student programming and financial aid, program and research funding, and capital projects.

As this Summary illustrates, the approved academic funding priorities include a strong focus on funding for faculty recruitment and retention, and student experience, access and financial aid. Divisions will seek donations to improve the quality of student life and academic programs, ensuring that outstanding students are able to attend the University regardless of their economic background, and ensuring that the University continues to attract and support the faculty talent needed to meet divisions' academic goals. Many approved academic funding priorities will contribute to the ability of the University's divisions to address major global challenges and societal issues, including but not limited to those advancing healthy lives, sustainable futures, and equity and inclusion.

The total value of identified academic funding priorities—\$5.3 billion—intentionally exceeds the fundraising goal of \$4 billion, recognizing that in a typical campaign, it is not possible to attract support for every one of the many hundreds of priorities established.¹ It is also anticipated that as the campaign progresses, new academic priorities will naturally emerge from ongoing academic and strategic plans—particularly when new Principals or Deans are appointed and initiate new cycles of academic planning.

Student Programming and Financial Aid

Divisions have identified substantial priorities for student support, totalling \$1.409 billion. These include priorities for undergraduate and graduate financial aid, including both need-based and merit-based awards for under-represented groups; for projects such as orientation activities, small-group learning communities, study centres, teams, and student programming; initiatives that will assist students both academically and in career-building, such as research funds, mentoring programs, and internships; and for initiatives that will provide students with international experience including travel funds, study abroad opportunities, exchanges, international research funds, and conference funds.

Faculty Funding

Divisions will also be seeking significant support for both endowed and limited term faculty positions through the campaign. A total of \$1.314 billion in faculty support

¹ Similarly, for the Boundless campaign, academic divisions put forward funding priorities well in excess of that campaign's original \$2 billion goal.

priorities has been identified by divisions in support of directors, chairs, professors, assistant professorships, lecturers, fellowships, visiting professors, and limited-term professors. Divisions will also seek support to recruit the next generation of faculty in the form of funding for new assistant professorships for a term of five years.

Research and Program Funding

\$1.624 billion in research and program priorities have been identified. These include supporting academic programs, curriculum innovation, interdisciplinary centres, research networks, specific areas of research, and funds that can be used to support research in areas of excellence, as well as support for speaker series, lectures, summits, conferences, and colloquia.

Institutional Strategic Initiatives

A new and uniquely differentiating feature of the campaign will be its focus on supporting a number of large-scale, interdisciplinary and inter-divisional institutional strategic initiatives (ISIs). Developed in close collaboration with the Vice-President Research, Innovation, and Strategic Initiative, the AVP and Vice-Provost Strategic Initiatives and their teams, these ISIs will serve as major platforms capable of inspiring some of the campaign's largest gifts. Such initiatives will integrate diverse research strengths across the University to create new knowledge and find solutions to some of today's most pressing global challenges. The ISI initiatives will also provide essential support to emerging networks of scholars focussed on large-scale interdisciplinary projects. In the *Summary of Approved Academic Funding Priorities*, the funding priorities associated with ISIs are embedded in divisional plans, having been planned and approved following the same rigorous process and policy framework in place for all funding priorities.

Capital Projects

A significant number of capital and infrastructure renewal priorities have been identified by the divisions as part of their academic planning processes. Funding required for capital and infrastructure priorities include preliminary estimates of private and other forms of support required, totaling \$974 million. Priorities range from the development of new buildings to the expansion, renewal, maintenance, and enhancement of existing structures. These include the development of classroom, laboratory, public, and student commons spaces. In some cases, such projects are at early stages of planning. Fundraising goals for early-stage projects will be refined and evaluated as part of the University's capital and infrastructure renewal planning processes as laid out in the *Policy on Capital Planning and Capital Projects*, as well as through appropriate governance processes.

Endowment Funding

In the previous campaign there was a balanced approach to endowment support, with particular focus on supporting student aid and endowed faculty positions. The new campaign will take a similar approach by putting emphasis on continued growth of the University's endowment in support of student aid and faculty support, and at the same time increasing expendable support with immediate impact.

Support to Date

Many supporters have made generous commitments to the University's approved academic priorities since the conclusion of the Boundless campaign.

It is common practice with large, comprehensive campaigns to establish a starting date from which gifts will be counted based on some distinguishing criteria. The starting date for the new campaign was January 1, 2019, established to immediately follow on the conclusion of the Boundless campaign on December 31, 2018.

Categories of gifts that will be counted towards the campaign are based on the reporting standards for educational fundraising established by the Council for Advancement and Support of Education (CASE), as well as on the commonly accepted industry standards for universities in Canada. Gift categories counted towards the campaign will include outright pledges and gifts, realized bequests, unrealized bequest intentions from individuals who will reach 65 years of age or more by the conclusion of the campaign period, and philanthropic research grants that meet CASE reporting standards.

Since the campaign counting start date of January 1, 2019, the following philanthropic support has been received:

Total philanthropic gifts*	\$816,674,685
Total philanthropic grants**	\$108,287,475
Total philanthropic support	\$924,962,160

*Figures current as of August 20, 2021.

**Reflects philanthropic research grants received through the Research Office since January 1, 2019 that meet CASE reporting standards. Figures current as of July 31, 2021.

It is anticipated that the campaign will launch with a minimum of \$1 billion in private sector support secured.

Conclusion

With twin goals of \$4 billion in donations and 1 million instances of alumni engagement from 225,000 unique alumni, the campaign for the University of Toronto is unprecedented in Canada for its breadth and ambition. The campaign will enhance the University's leadership and excellence in a broad range of areas essential to its teaching and research mission. It will accelerate the University's impact on some of today's most pressing issues and inspire a new generation of students and alumni to value a life-long mutually beneficial association with their alma mater. It will also enhance the University's commitment to equity, diversity, and inclusion, and strengthen its commitment to the pursuit of excellence, accessibility, and an engaged, caring community. This strong support for the University and for higher education in Canada will provide an outstanding platform to advance the University's reputation as one of the world's leading sources of talent, knowledge, and innovation for a changing world.