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INTRODUCTION

This year's Annual Report to Business Board focuses on capturing the degree to which DUA is broadly-focussed on advancing the interests of the University—by strengthening relations with alumni, by raising funds, and by increasing public awareness of the accomplishments and expertise of our scholars and our students.

A significant portion of DUA's mandate involves the design and execution of programs that bring our community together. The past year illustrates the role of these programs, in times of tragedy, and in times of celebration.

DUA played a key “behind the scenes” role in a broad range of activities that the University undertook. The U of T web page and University of Toronto *Magazine* provided an opportunity for the community to come to terms with the September 11 attacks. An email from the President to our US alumni received more than 100 replies, many of which were reprinted in the *Magazine*. In the aftermath of the attacks, many faculty members played a high-profile role in explaining the key issues facing the international community.

The past year was also a time for celebration. Thousands of faculty, staff, and alumni attended events celebrating the 175th anniversary of the granting of the Charter for King's College which became the University of Toronto. The 175th anniversary gave DUA a new opportunity to reach out to our 370,000 alumni, and to highlight the contributions the University is continuing to make to the community – in Ontario, across Canada, and around the world.

This year's report also discusses the progress towards the \$1 billion Campaign goal. Notwithstanding the impact of current economic challenges, the Campaign is continuing to meet the projections presented to Business Board in November 2000, and in fact, has just passed the \$900 million mark. The requirements for private support continue to be influenced by emerging academic priorities and the challenges of enrollment expansion. The Campaign will continue to be servant to the academic plan, and will be strengthened by the integrated advancement programs discussed in this report.

Jon S. Dellandrea
Vice-President and Chief Advancement Officer

2001-02 OBJECTIVES OF THE DIVISION OF UNIVERSITY ADVANCEMENT

The following objectives for the Division were stated in last year's Report to Business Board:

1. Continue intensive activity to raise a minimum of \$1 billion in support of the University's academic aspirations by December 31, 2004. Our specific target for 2001-2002 is to meet or exceed the financial projections tabled before Business Board to reach a Campaign total between \$840 - \$884 million by April 2002.
2. Create in the minds of private and public supporters the link between graduate student support, the Canada Research Chairs, capital projects and enrollment-driven capital expansion.
3. Undertake an institutional communications plan that builds on the success of "Great Minds" and communicates new academic and research objectives and the importance of human and physical capital.
4. Continue raising the profile of the University of Toronto, nationally and internationally.
5. Where appropriate, work collaboratively with other vice-presidential portfolios in support of areas such as student recruitment, government relations, and research funding.

In our 2001-02 plan, we reiterated our commitment to create one of the world's best advancement programs while providing the private funding required to help U of T meet its more ambitious academic and research objectives.

ANALYSIS OF DIVISIONAL PROGRESS TOWARDS OBJECTIVES

I n the second year of the final phase of the Campaign, we made significant strides toward the ambitious goal set by President Birgeneau at his installation on October 22, 2000. At the end of the fiscal year on April 30, 2002, the cumulative Campaign total, including cash and pledges stood at \$874,444,714. This result is at the high end of the projections that were presented to Business Board in November 2000, which established a target of \$840 million to \$884 million for this date.

We are pleased to report that in addition to meeting our financial objectives we continued to make excellent progress towards our non-monetary goals. Professional adjudicating bodies once again recognized DUA's programs and publications as outstanding and worthy of some of the highest honours afforded the advancement profession.

We also maintained a substantial lead over our Canadian peers in national and regional news coverage and saw a substantial increase in positive news coverage as a result of the University's 175th anniversary. The impact of our communications programs helped U of T to hold a commanding position among Canada's medical/doctoral universities in the annual *Maclean's* survey of university rankings.

DETAILED REVIEW OF PROGRESS TOWARDS 2001-02 OBJECTIVES

The remainder of this section analyzes the Division's progress towards its 2001-02 objectives, which were presented to Business Board in DUA's 2000-01 annual report.

1. Maximize support for the University's existing and emerging academic priorities and especially new capital projects. By working collaboratively with the divisions, we aim to meet or exceed the financial projections tabled before Business Board. We plan to reach a Campaign total between \$840-\$884 million by April 30, 2002.

As noted, the cumulative Campaign total on April 30, 2002, including cash and pledges stood at \$874,444,714. This result is at the high end of the projections presented to Business Board in November 2000. A chart detailing the projections is provided below.

The ability of the University to sustain the trajectory of the Campaign in the face of an economic downturn and the aftermath of the September 11 attacks is due in a significant measure to the loyalty of U of T's alumni, friends, faculty, and staff.

The University received \$134,657,638 in cash and gifts in kind from over 27,500 donors in 2001-02. This amount includes the McLaughlin Foundation's payment on last year's \$50 million pledge to establish the R. Samuel McLaughlin Centre – one of the largest gifts in Canadian history.

Additional financial information is presented in Appendices "A" through "F" of this report.

The key components of the DUA fundraising program follow below.

Major Gifts

- The Division worked with the Provostry to prioritize the standing of all of the University's capital projects in the Campaign. This increased our ability to identify prospective benefactors and to manage the marketing and execution of programs targetting capital projects. Consequently, we made significant strides in providing central fundraising support

Campaign Results vs projections

Date	Projection (\$millions)	Results achieved (\$ millions)
By April 30 2001:	\$740 to \$762	\$792
By April 30 2002:	\$840 to \$884	\$874
By April 30 2003:	\$940 to \$1,006	
By April 30 2004:	\$1,040 to \$1,128	
By Dec. 31 2004:	\$1,098 to \$1,199	

Projections presented to Business Board Nov 20 2000

and coordination for capital projects with private sector requirements.

- Major gift activity in the Greater Toronto area was intensified significantly, resulting in an approximately 200 per cent increase in the number of prospects cleared for identification, cultivation, or solicitation.
- We continued to bring together divisions working in similar areas, such as: Film (Innis) and Theatre (SGS and Hart House) and Aboriginal initiatives. Cross-divisional collaboration has resulted in a number of major gifts, particularly in the area of Aboriginal initiatives, where sufficient support was obtained to establish both an endowed Chair in Medicine, and significant student support.
- Intensive work on the Ontario Graduate Scholarships (OGS) resulted in 193 commitments toward the OGS program.
- The recruitment of the Group of 175 – which commenced with the launch of the Campaign in 1997, was completed by the start of the University's 175th anniversary in March 2002. The recruitment of this group of 175 strong supporters and volunteers is one of the major achievements of the Campaign.

Annual Giving Programs

- We raised \$11,447,467 toward our annual giving goal of \$12 million, a 9.4 per cent increase over last year's total of \$10.8 million. This finding is particularly significant in light of the fact that all annual giving appeals were halted for approximately one month following the September 11 attacks.
- Corporate matching was secured for one hundred per cent of the eligible gifts.
- Over 22 per cent of one-year lapsed alumni donors were renewed and over 1,000 new donors were acquired.
- We also saw a modest increase in the percentage of telefunding revenue collected by credit card over the last fiscal year. Credit card payments reduce the administrative costs associated with the Annual Giving Programs, and provide an easy means for donors to support the University.

Campaign Marketing

The achievement of our financial objectives was once again, greatly aided by innovations in our campaign communications that are documented in more detail under point four in this report.

2. Reposition the gift planning function in order to meet or exceed the parallel Campaign goal of \$200 million in future gift intentions by 2004.

Two and half years ago an external review of the Gift Planning area resulted in a series of recommendations that were completed this year. Our deferred gift goal is well within reach at \$193,752,531 and we achieved over \$8.5 million in realized bequests in the past year.

- Major strides have been made in integrating the gift planning function into the existing processes for major gift cultivation, solicitation and stewardship, making it possible to make more integrated, joint approaches to donors.
- Significant progress has been made in identifying new prospects for future gifts, with over 450 new individuals identified to date.

3. Enhance U of T's overall positioning nationally and internationally through effective communications.

We continued to take a commanding lead over our counterparts in our ongoing efforts to position U of T as one of the world's leading public research universities. We achieved particular success at national positioning vis-à-vis other Canadian research-intensive universities. On average, we commanded 40 per cent of all news coverage generated by seven Canadian research-intensive universities participating in national media tracking through Cormex Research.

- U of T maintained its leading position in the 11th annual *Maclean's* ranking for the eighth year in a row.

- We saw a 30 per cent increase in the use of U of T experts post-September 11.
- Issues management was a central activity during the year, with a number of sustained and high-visibility issues including the retired female faculty, the Faculty of Law , the Healy and Olivieri cases, as well as tuition levels and the double cohort. U of T's negative coverage is comparable to its Canadian peers.
- Twenty-nine announcements of donations exceeding \$1 million were a significant source of positive external media coverage.
- Increased activity in research communications helped balance the university's overall news coverage, with particular success in the areas of medicine and business.
- The greatest source of positive coverage, which informed the majority of the department's communications this year, is the University's 175th anniversary.
- We emphasized consistency in the University's visual identity through marketing assistance to a number of academic divisions. Work continued on the development of a Web-based style guide.
- The University of Toronto *Magazine* increased its voluntary subscription results by almost 10 per cent and raised \$108,000 in the past year.

Once again, publications produced by the Division received some of the highest honours bestowed by peers:

- The *Bulletin* was redesigned and won the gold medal for best newspaper from the Canadian Council for the Advancement of Education (CCAEE) in its prix d'excellence program.
- *Edge*, published by Research and International Relations, and produced with assistance from DUA, won best magazine in the small shop category of the above program.
- The University of Toronto *Magazine* won two CCAE gold medals, one silver (for best magazine), and two bronze.

- Two press releases won gold and bronze medals respectively in the best news release category.
- Based on both internal and external reports, the award winning *2001 National Report* was one of the best yet, winning the CCAE gold medal for best annual report. A new interactive web site with polls was introduced to further encourage and gauge reader response.

4. Develop and implement effective communications around new and emerging academic priorities and especially new capital projects.

Central to the current phase of the Campaign for the University of Toronto were the new communications developed to reflect increased capital expansion on campus. These communication pieces continue to be developed and implemented in cooperation with the business, advancement, government relations and research vice-presidential portfolios.

- A new staff position was established to focus on capital projects and we are now in the process of creating material on all planned capital projects.
- Campaign focused communications emphasized the impact of gifts on teaching and research across the University. The *Campaign Quarterly* and *U of T Magazine* also highlighted the impact of major gifts, annual fund gifts, and planned gifts, ensuring that donors at every level could see stories representing the impact of both large and small gifts in divisional publications.
- Specific information pieces focussed on the OGS program were produced, as well as a new matching program document.
- A specialized brochure, “Securing the Future of Hart House Theatre” received a silver medal in the CCAE prix d’excellence program and was only one of many specialized appeals designed for prospective donors.

- Marketing and communications needs of the Divisions were monitored and supported – backgrounder documents, customized proposals for solicitation, marketing plans, new logo development, UTSC and UTM banner projects were produced. In addition, efforts were made to help Divisions become more independent and self-sufficient in the printing of their brochures.

5. Develop and implement accountability and productivity measures in order to benchmark and enhance performance of divisions and of individual advancement staff.

Several initiatives over the past year advanced DUA's ability to both assist and evaluate the performance of divisions and of individual advancement staff.

- The first cycle of the new Advancement Professional evaluation program was successfully completed in July 2002. Guidelines for evaluators/supervisors and for the Advancement Compensation Committee were developed and effectively implemented.
- An review of divisional use of Advancement Research was carried out to better address the University's requirements for prospect and donor research.
- Once again, divisional meetings were held in both the spring and the fall with Deans, the Vice-President and Chief Advancement Officer and the Senior Development Officers in order to monitor, gauge and support progress of individual Divisions toward their Campaign goals.
- A monthly contact report continues to be provided to all key members of the senior administration and advancement staff in order to better gauge and facilitate the activity level with prospects and donors.
- DUA continued to provide training, writing support, advice on proposals, strategic counsel, and ongoing coordination of divisional major gift activity.

6. Continue to build an outstanding alumni program, recognized by peers as being one of the strongest in Canada and distinguished by high quality communications and programming.

Alumni programs received two significant honours in the past year: a gold medal for the best newsletter *Borderlines* (distributed to alumni and friends outside of the greater Toronto area) and a silver medal for a “virtual send-off” program developed to bring together incoming students with local alumni. This program was recognized for its “creativity on a shoe string budget”.

- The past year saw a 34 per cent increase in the number of regional events to 59 and the introduction of programming into six new geographic areas. Increases in attendance of up to 10 per cent at regional events also distinguished our regional activity from the past year. There was a 29 per cent increase in participation at the Hong Kong Convocation and our regional event web pages consistently rank among the top 50 pages visited.
- We have streamlined our processes to increase efficiency and cost effectiveness. Most of our alumni events use a standardized RSVP database; attendance, participation, demographic trends and attendee post-event surveys are recorded and measured following each event.
- The appeal and the cost effectiveness of spring reunion were improved. A 60 per cent reduction in expenses associated with print materials was realized. New events, such as the 50th anniversary luncheon, were sold out.
- An e-newsletter to alumni and friends was launched in August 2001. Once a month, over 55,000 alumni are contacted with information about campus developments, research and alumni news. To date there has been exceptionally positive feedback on the content and the form of the newsletter.

7. Provide the highest level of support and recognition for volunteers and outstanding faculty, staff and students through meaningful volunteer opportunities and recognition programs.

Volunteers play a critical role in the governance and advancement of the University of Toronto. Many of the accomplishments referenced in this report, from student send-offs to special events, could not have been accomplished without the active participation of volunteers. Volunteers also play a critical role in providing financial support. For example, nearly 80% of the volunteers who have received the Arbor Award are also donors to the University.

- This past year was distinguished by the successful completion of recruitment of the Group of 175. This group of strong supporters is a major achievement of the Campaign. Each of the 175 members is a key leader who has helped the University of Toronto reach this historic landmark while transforming the face of philanthropy in Canada.
- The Arbor and Cressy awards continue to enjoy great popularity, with 92 new Arbor recipients and 137 new Cressy winners selected this past year.
- Since 1979 and 1996 respectively, the Awards of Excellence and the Northrop Frye awards continue to serve as two of the University's premiere recognition programs for faculty, staff and students. The following outstanding members of the University community were recognized this past year:
 - **Faculty Award:** Professor Alexandra Johnston, from the Department of English, Arts and Science, Victoria University.
 - **Chancellor's Award:** Sandra McGugan, Administrative Director of the MD/PhD Program in the Faculty of Medicine.
 - **Joan E. Foley Quality of Student Experience Award:** Sundeep Singh, President of the Scarborough Campus Students' Union.

- **Ludwik and Estelle Jus Memorial Human Rights Prize:** Professor David Cameron, Political Science, Arts and Science.
- **John H. Moss Scholarship:** Joshua Cramer, Arts and Science, Victoria University.
- **Northrop Frye Awards:** Professor John Hull, Joseph L. Rotman School of Management and Professors Ronald Deibert and Janice Gross Stein for their course: “Networks, Nations and Global Politics”.
- High profile volunteer hosts were used at regional 175th anniversary events.
- We continued to feature volunteers and their contributions in publications such as *Borderlines*.
- We continued to support the Campaign Cabinet, Campaign executive and The Group of 175.

8. Set or exceed industry standards for effective, responsible, personalized donor recognition and stewardship of donors.

The stewardship and donor recognition areas were reorganized in 2001-02 in order to serve the needs of our donors.

- As stewardship was integrated with the major gifts area, and as tools such as the stewardship activity reports and the Chair Holder status reports were refined, DUA was better able to assist divisions with coordinated, effective stewardship of donors.
- As part of our stewardship initiatives, 766 donor financial reports were distributed to donors of major gifts.
- As of the end of the fiscal year, we had reduced the number of pending donor recognition events to eight from 30. Over 20 donor recognition events were successfully completed, with more than 2,300 participants.

9. Continue to refine and improve divisional administrative processes to provide the highest level of internal and external customer service.

We continue to improve the accuracy and completeness of information on the Donor Information System (DIS) which supports all Advancement activities at the University of Toronto.

- We embarked on an aggressive campaign to increase the number of email addresses for alumni in light of the various electronic initiatives launched over the past year and are adding new email addresses to the system at an average of 20 per day. In March 2002, we uploaded over 20,000 “utoronto” email addresses.
- The last year saw a reduction in our invalid rate for alumni addresses to 20 per cent. We employ service bureaus to cleanse and update our address and telephone data on an ongoing basis.
- We continued to refine and automate the Prospect Management module of the Development Information System (DIS) in order to facilitate increased usage of the system.
- We successfully recruited a highly experienced Controller in January 2002 in an effort to add senior management expertise to the donations management function and to improve service to the University and donor communities
- In the last fiscal year, 33,098 pledges, 43,749 payments and 34,762 receipts were processed on the Development Information System (DIS).
- Phase one of an automated tax receipting process was completed and implemented in April 2002.
- Significant progress was made during the year in reconciling matching program data and ensuring that all matching figures on the monthly Campaign statements accurately reflect the matching commitments.

10. Continue to support the University's ambitious student recruitment goals.

We continued our commitment to collaborate and support the Office of Student Recruitment through a variety of initiatives.

- We collaborated extensively with the student recruitment office on the development, promotion and launch of www.myfuture.utoronto.ca – a Web-based student recruitment navigator program.
- Through the Alumni Recruitment Network (ARN), 316 students were reached internationally during the post-offer period, 24 alumni were involved in post-offer receptions, including five alumni speakers and another 27 alumni were involved in other miscellaneous volunteer recruitment activities.
- We expanded our student “send off” program by doubling the number of “send offs” to 23 held internationally. Over 450 new students, 137 alumni and 70 current students participated.

11. In keeping with the university's aspirations to rank among the world's top public research universities, U of T's web presence should become a North American leader in innovation, interactivity and service.

The Division implemented a significant number of innovations in our web presence and its effectiveness over the past year. The web was used once again to complement publications such as the *National Report* and to help us gauge reader response. Interactivity was improved through *National Report* reader polls and through the creation of a “design your own banner” component on the 175th anniversary site.

- We launched the alumni online directory in June 2002 and the News@UofT newsletter in August 2001. This newsletter has seen a consistent increase in circulation, from 11,000 to over 55,000 by May 2002. We also saw a reduction in the “bounceback” rate from 22 per cent to 3 per cent.

- We redesigned the alumni and friends web site and added new services such as the senior alumni newsletter. The number of visitors to the Alumni and Friends web site has increased by close to 100 per cent since June, 2001.
- The 175th anniversary celebrations were supported and enhanced by an extensive web presence, www.uoft175.utoronto.ca

12. Be a Canadian leader in Affinity and Licensing by 2004 with particular emphasis on marketing and the sponsorship and trademark licensing areas during 2001-02.

We exceeded our non-philanthropic gross revenue target of \$865,250 and generated \$1,027,000 in 2001-2002.

- Part of our success was the launch a new affinity credit card with MBNA that exceeded our target by 43 per cent in acquiring 8,600 new card holders.
- Despite the aftermath of September 11, the profile and exposure of the alumni travel program increased through a travel magazine launched in late September 2001 and electronic marketing through the web site. As a result, overall revenue targets were exceeded by 135 per cent generating \$110,000 in affinity travel revenue.
- We continued to play a leading role in Collegiate Licensing, both at U of T and among other Canadian universities. We developed a digital library of official marks, widely communicated university licensing policies and protocols through bi-weekly reminders sent to all divisions, created a promotional brochure; hosted a vendor fair attended by 30 licensees, and established an interactive web site for licensees. In addition, we established a Canada-wide listserve, presented two major reports at the Association of Collegiate Licensing Administrators (ACLA) Conference and hosted a licensing conference/meeting with five universities in attendance.
- The sponsorship area evolved significantly over the past year as a sponsorship clearance protocol was approved and sponsorship management guidelines have been developed to outline the procedures for sponsorship clearance and coding.

13. Maximize the benefit of the University's 175th anniversary to the Campaign, alumni programming and general publicity purposes.

We continued to build on the Great Minds theme by putting a human face on 175 years of accomplishment throughout the anniversary year. The 175th anniversary theme was integrated into all Divisional communications.

- Each issue of the News@UofT newsletter features a 175th anniversary section; the alumni and friends site regularly features 175th anniversary content and has links to the 175th anniversary site.
- A variety of communication materials and programs have been structured around Professor Friedland's *The University of Toronto: A History*. Some examples include weekly Q & A ads appearing in *The Globe and Mail*, excerpts from the book featured weekly on the U of T Homepage and in every edition of the *Bulletin* during the anniversary year.
- In addition, regional alumni events have been structured around Professor Friedland's book tour with two taking place prior to the fiscal year end and at least 18 scheduled for the coming year.
- The anniversary year also prompted new additions to the highly successful Great Minds banner program. More than 100 U of T alumni, faculty, staff and students are now featured on the banners, which were redesigned with the 175th anniversary crest and re-introduced to the streets of Toronto, Scarborough and Mississauga.
- A host of interactive programs have been developed on the U of T website, including make-your-own-banner and online memories opportunities that have captured the imaginations of hundreds of Web browsers. An expanded *Great Minds in Profile* booklet featuring the banner biographies was produced for distribution to alumni and for selected use in student and faculty recruitment.
- A 175th anniversary commemorative calendar was developed and distributed to graduating students, alumni and key volunteers.

- All university events have been “branded” with the 175th anniversary including regional, reunion and donor recognition events.
- The University of Toronto *Magazine* produced an outstanding 122 page souvenir edition in commemoration of the 175th anniversary.
- All other publications, including *Borderlines*, have reflected the 175th anniversary theme.

HIGHLIGHTS OF 2002-2003 GOALS AND PRIORITIES

During the next year the Division of University Advancement will focus on achieving its financial and related goals while preparing for the post-Campaign transition period and establishing the foundation for the future sustainability of our Advancement programs. This will involve a modest adjustment to our strategies, introducing some new programs and intensifying stewardship of current and past supporters.

Our communications strategies will begin to take into account the post-Campaign, post-175th anniversary period and will take a proactive approach to maintaining our profile and determining new messages.

1. Maximize support for the university's existing and emerging academic and capital priorities. In response to the academic priorities articulated by the new Provost and in collaboration with the Divisions, we aim to meet or exceed the financial projections tabled before Business Board by reaching a Campaign total of between \$940 million and \$1 billion by April 30, 2003.
2. Continue to integrate gift planning into our overall advancement activities.
3. Intensify efforts to develop the sustainability of our Advancement program beyond the Campaign by continuing to expand the base of the University's private support, revitalizing our annual giving efforts and practicing effective stewardship.
4. Enhance the University of Toronto's overall national and international positioning through effective communications.
5. Continue to maximize the benefit of the University's 175th anniversary to the Campaign, alumni programming and general public exposure.

6. Continue a high level of alumni engagement through quality communications, local and regional programming and effective volunteer management.
7. Enhance involvement opportunities for alumni and Campaign volunteers.
8. Establish U of T as the leader in the management of non-philanthropic revenue generating programs including affinity, alumni travel, sponsorship and trademark programs.
9. Continue to develop and implement accountability and productivity measures in order to benchmark and enhance performance of divisions, advancement program areas and individual staff members.
10. Continue to refine and improve administrative processes to reduce costs and to provide the highest level of internal and external customer service.
11. Encourage and participate in the complex interaction between various portfolios on issues such as private funding, capital expansion, increased enrollment, and student recruitment.
12. Begin to prepare for the transition from the Campaign to the post-Campaign period. This is one of our overriding goals over the next year during which we will develop a plan outlining the details of our transition strategy.

CONCLUSION

From the outset of this Campaign, one of our main goals was to establish a new base level of intensity and success for our Advancement Programs. Our intent was to establish a higher plateau from which the University's next Campaign effort could begin without any of the characteristic post-Campaign "slumps" experienced by many institutions. To that end, we are intensifying our efforts to prepare for the Campaign transition and sustainability well in advance of the completion of the Campaign. We do this not only to fulfill our original goal, but also to actively support the new Presidential and Provostial vision.

Appendix A:

CAMPAIGN TOTALS AS OF APRIL 30, 2002

Donations	Pledge/Gift Amount
Confirmed Pledges	\$479,849,633
One-time Gifts	\$220,933,338
Realized Planned Gifts	\$74,809,441
Gifts-in-Kind	\$98,852,302
TOTAL¹	\$874,444,714

Other Revenue Related To Campaign Activity as at April 30, 2002

Government Grants in Support of Campaign Priorities²	\$127,005,509
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University Matching Funds for Campaign Gifts	\$299,782,236
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Future Bequest Intentions	\$193,752,531
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Government Research and Infrastructure Funds Related To Campaign Gifts³	\$231,802,276
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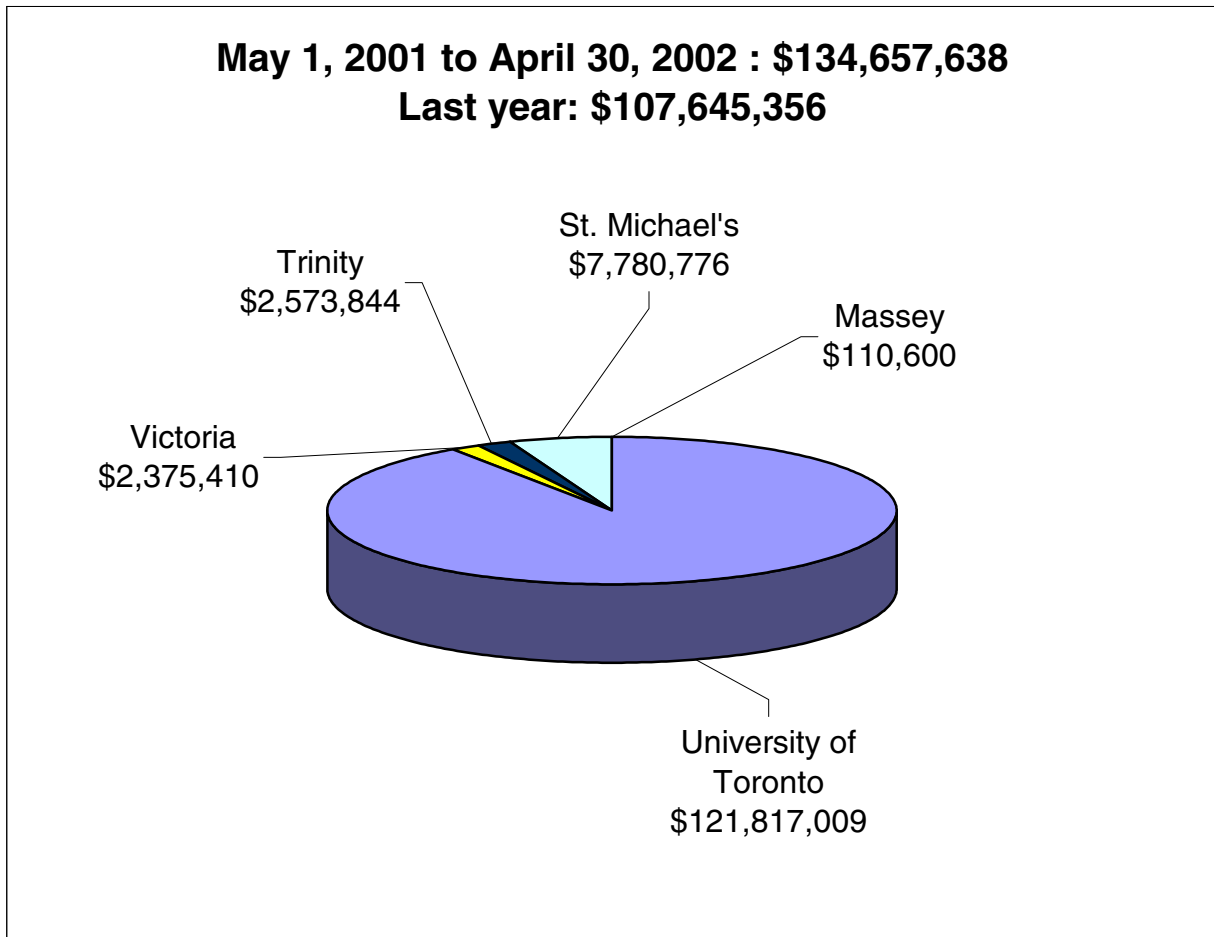
Research Investment Related To Campaign Gifts	\$1,980,000
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¹ The Campaign progress includes University of St. Michael's College, University of Trinity College and Victoria University.

² Includes: OSOTF \$114,234,007; OGSST \$8,622,054; additional grants from the Government of Canada Millenium Fund and the City of Toronto, \$4,149,448

³ Includes: CFI \$35,854,983; ORDCF \$36,822,500; OIT \$91,524,793; SuperBuild \$67,600,000

Appendix B: ANNUAL FUNDRAISING ACHIEVEMENT



*These Figures include both donations receipted directly by the Federated Universities and receipted by the University of Toronto and the Federated Universities.

Appendix C:

RECONCILIATION BETWEEN U OF T AUDITED FINANCIAL STATEMENTS & ANNUAL FUNDRAISING ACHIEVEMENT

May 1, 2001 - April 30, 2002

Audited Financial Statements 01/02

Monetary Gifts	\$ 113,114,669	
Gifts-in-kind	<u>9,268,827</u>	<u>\$ 122,383,496</u>

Overall Fundraising Achievement 01/02

University of Toronto:

Monetary Gifts	\$ 113,114,669	
Gifts-in-kind	<u>9,268,827</u>	\$ 122,383,496

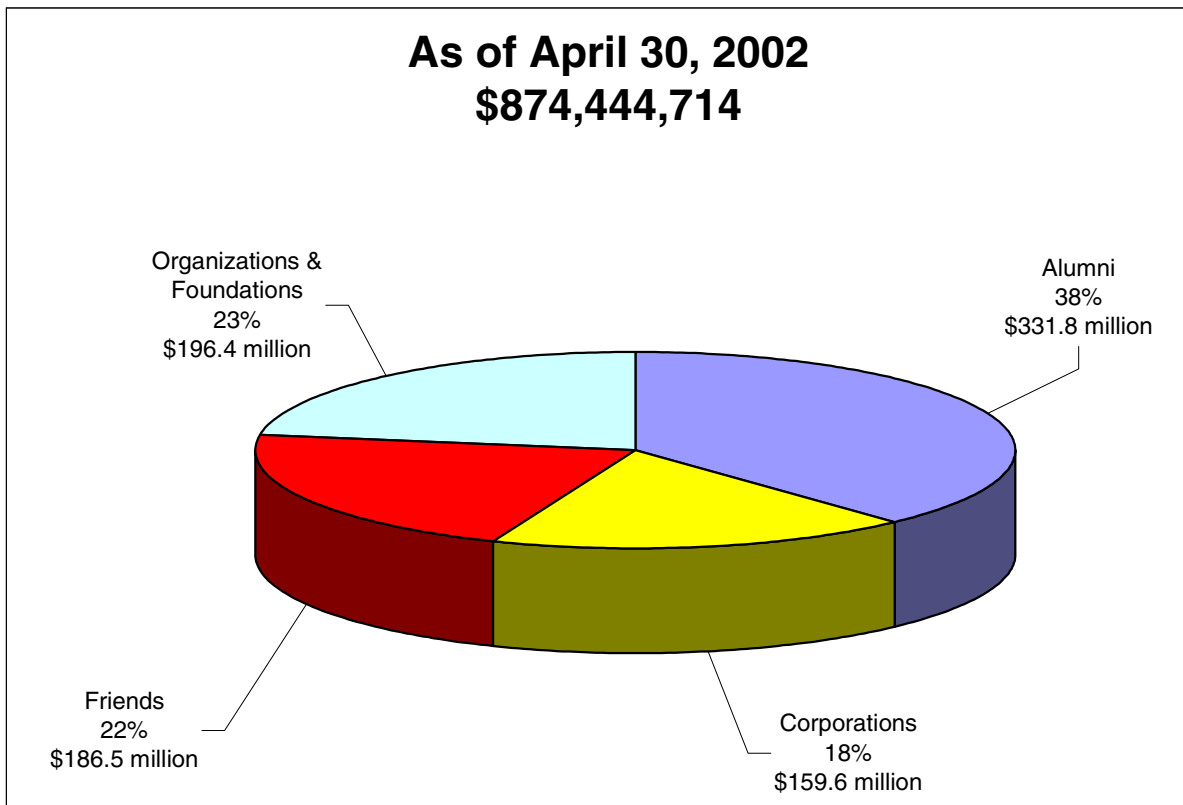
Federated Universities:*

Massey	110,000	
St. Michael's	7,507,983	
Victoria	2,094,565	
Trinity	<u>2,561,594</u>	12,274,142

Total Overall Fundraising Achievement		<u>\$ 134,657,638</u>
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*These figures include those donations receipted by the University of St. Michael's College, University of Trinity College, Victoria University and Massey College.

Appendix D: SOURCES OF DONATIONS TO THE CAMPAIGN



Appendix E:

GIFT PLANNING AND BEQUESTS

Fiscal Year Comparison of 2000-2001 to 2001-2002

Type of Gift	Number of Donors	2000-2001	Number of Donors	2001-2002
Estate Gifts	106	\$9,320,590	101	\$8,583,350
Annuity Gifts	1	\$50,000	1	\$50,000
Remainder Trust Gifts	0		1	\$115,000
Insurance Death Proceeds	0		2	\$31,065
Total	107	\$9,370,590	105	\$8,779,415

Appendix F

THE CAMPAIGN: DIVISIONAL BREAKDOWN

As of April 30, 2002

Division	Pledges and Gifts
Applied Science and Engineering	107,583,377
Architecture, Landscape and Design	3,785,553
Arts & Science	87,692,356
Dentistry	5,804,625
Forestry	1,366,457
Graduate Studies	17,649,968
Hart House	1,766,320
Information Studies	2,473,393
Innis College	1,408,405
Joseph L. Rotman School of Management	52,425,915
Law	24,307,335
Library	67,219,957
Medicine	203,345,765
Music	11,014,857
New College	1,555,727
Nursing	4,400,222
OISE/UT	9,096,972
Pharmacy	30,462,829
Physical Education & Health	4,020,990
School of Continuing Studies	233,285
Social Work	16,630,575
St. Michael's College	30,557,593
Student Affairs	2,373,397
Transitional Year Programme	1,328,993
Trinity College	17,975,928
U of T at Mississauga	14,080,564
U of T at Scarborough	4,570,063
University College	21,804,475
UTS	15,043,689
Victoria College	30,296,262
Woodsworth College	5,990,702
Centrally Admin. Funds*	70,621,768
President's Fund	2,019,376

* Includes: Centrally administered student awards, Knox College, Massey College, Wycliffe College, some capital projects, central programs, and Joker's Hill.

Appendix G:

REGIONAL PROGRAMMING

MAY 2001 - APRIL 2002

May

St. John's, NF	Post-offer Reception	May-04
Halifax, NS	Post-Offer Reception	May-05
Vancouver, BC	AGM & Theatre Night	May-05
Boston, MA	Alumni Reception	May-06
Victoria, BC	Post-Offer Reception	May-10
Halifax, NS	Alumni Reception	May-11
Vancouver, BC	Post-Offer Reception	May-11
Calgary, AB	Post-Offer Reception	May-12
Washington, DC	All Canadian Alumni Event	May-12
Montreal, PQ	Post-Offer Reception	May-16
Chicago, IL	All Canadian Alumni Event	May-18
Tokyo, Japan	All Canadian Alumni Event	May-22
Vancouver, BC	Locally organized event - theatre night (A.R.T).	May-22
Markham, ON	Alumni Lunch for Technology Professionals	May-23
Victoria, BC	AGM	May-25
Hong Kong	HK UTAA AGM	May-26
Ottawa, ON	Post-Offer Reception	May-28
Kingston, ON	Post-Offer Reception	May-29
London, ON	Post-Offer Reception	May-31

June

Kitchener, ON	Post-Offer Reception	Jun-01
Montreal, PQ	Alumni Reception	Jun-04
Baltimore, MD	Alumni Reception	Jun-06
Beijing, China	Alumni Reception	Jun-11
Hong Kong	HK Foundation AGM	Jun-14
Vancouver, BC	Southern Ontario Alumni Reunion (SOAR) BBQ	Jun-23
Taipei, Taiwan	Farewell event for David Mulroney	Jun-28

July

London, UK	Alumni Reception	Jul-14
Barbados	Student Send-off - alumni hosted	Jul-20

August

Barrie, ON	Student Send-off	Aug-07
Peterborough, ON	Student Send-off	Aug-08
Kingston, ON	Student Send-off	Aug-09
Winnipeg	Student Send-off - alumni hosted	Aug-11
Victoria, BC	Student Send-off - alumni hosted	Aug-12
Halifax, NS	Student Send-off - alumni hosted	Aug-12
Vancouver, BC	Student Send-off	Aug-13
Calgary	Student Send-off	Aug-14
Edmonton	Student Send-off	Aug-15
Saskatoon, SK	Student Send-off - alumni hosted	Aug-16
Rochester, NY	Student Send-off - alumni hosted	Aug-17
Windsor, ON	Student Send-off	Aug-20
London, ON	Student Send-off	Aug-21

Waterloo, ON	Student Send-off	Aug-22
Burlington, ON	Student Send-off	Aug-23
Mawah, New Jersey	Student Send-off - alumni hosted	Aug-26
Montreal, PQ	Student Send-off	Aug-27
Ottawa, ON	Student Send-off	Aug-28
St. John's NF	Student Send-off - Alumni hosted	Aug-28
Sudbury, ON	Student Send-off - Alumni hosted	Aug-28
Thunder Bay, ON	Student Send-off - alumni hosted	Aug-26
Hong Kong	Student Send-off	Aug-11

September

Vancouver, BC	Rotman Alumni Reception	Sep-27
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October

Kingston, ON	Alumni Reception	Oct-04
Seattle, WA	All Canadian Gala Dinner	Oct-05
Winnipeg, MB	Alumni Reception	Oct-11
New York, NY	All Canadian Alumni Reception	Oct-18
Calgary, AB	Law Alumni Event	Oct-25
Thunder Bay, ON	Alumni Event	Oct-27

November

Peterborough, ON	Alumni Reception	Nov-08
Victoria, BC	Alumni Reception	Nov-30

December

Vancouver, BC	Alumni Reception	Dec-01
Vancouver, BC	Forestry Alumni Reception	Dec-05
Hong Kong	Alumni Reception	Dec-05
Singapore	Alumni Reception	Dec-07

January 2002

Singapore	Recruitment Event	January 19 - 20
Hong Kong	Recruitment Event	Jan-22
Tokyo, Japan	Recruitment Event	Jan-25
New York, NY	Alumni Reception	Jan-28
New York, NY	Law Alumni Dinner	Jan-28
Seoul, South Korea	Alumni Reception - locally organized	Jan-30

February

Norway	Education Fair	February 6 - 9
Montreal, PQ	Rotman, select alumni dinner	Feb-18
Ft. Lauderdale, FL	All Canadian Alumni Event	Feb-27
Hong Kong	Foreign Correspondents' Club Luncheon	Feb-27

March

Ottawa, ON	Alumni Reception	Mar-04
Melbourne, Australia	Alumni Open House	Mar-21
St. Catherines, ON	Alumni Reception - 175th Anniversary event	Mar-25
San Diego, CA	A&S Chemistry Alumni Reception	Mar-28

April

Kuala Lumpur	Alumni Reception	Apr-16
Washington, DC	All Canadian Alumni Event	Apr-19
Los Angeles, CA	SMC, Alumni Reception	Apr-28
Guelph, ON	Alumni Reception - 175th Anniversary Event	Apr-29
Paris, France	All Canadian Alumni Event	Apr-29

Appendix H

REGIONAL CONTACTS

Alumni Contacts Across Canada

Barrie, Ontario

Donald Dowds (BASc 1953)

Calgary, Alberta

Kenneth Severs (BASc 1969)

Hamilton, Ontario

Tia Geminiuc (BSc 1993
UTM)

Montreal, Quebec

Susan Darlington (BLS 1970)

Ottawa, Ontario

Katharine Gourlie (BSc 1961)
and
Marie Vaillant (BSc 1977
VIC)

St. John's, Newfoundland

Todd Stanley (LLB 1995)

Thunder Bay, Ontario

Kim Tobin (HBA 1996
SCAR)
Peter Young (BCom 1966
VIC)

Vancouver, British Columbia

Benjamin Garfinkel (BCom
1992 UTM)

Victoria, British Columbia

Gail Wallace (BA 1960 VIC,
MEd 1976)

Winnipeg, Manitoba

Douglas Hutchings (BA 1950
VIC)

Alumni Contacts Across the U.S.A.

Boston, Massachusetts

Leda Arakelian (BA 1989 VIC)

Chicago, Illinois

Anu Dhir (BA 1992 NEW)

Denver, Colorado

Brian Matsumoto (BA 1977
UTSC)

Florida

Ken Evans (BASc 1946)

New York, New York

Gary Kaufman (UC)

Northern California

Bodega Bay area:

Mary Louise Riley (BA 1948
TRIN)

San Jose and Silicon Valley area:

Fintan Clarke (BA 1991
UTSC)

Southern California

Los Angeles area:

Susan Brauch (BA 1974, Bed
1975)

Phoenix, Arizona

Bill Aziz (BASc 1987)

Seattle

Ben Dehghan (BASc 2000
ENG)

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

Beijing – Cesare Ruggiero
(Hon. BA 1999 VIC)

England

Kirsty Lynn (BA 1992 UTSC)

France

Mark Adam (BLA 1985)

Germany

Mary Kwok (Hon. BSc 1995
WDW)

Ghana

The Alumni of Canadian
Universities in Ghana
Heather Anderson

Hong Kong

Estella Niem (BCom 1993
Trinity)

Ireland

Dublin – Maria Gallo (BA
1998 SMC)
Kerry and Cork – Joan Mortin

Israel

Stephen Glazer (BA 1968 UC)

Japan

Mr. Shiro Kiyohara (BA 1960
UC)
and
Ms. Miki Iizuka (BSc 1990
UC)

Korea

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

Macau

Fred KC Kan (BASc 1964,
LLB 1967)

Malaysia

Dr. Ong Hock
and
Janice Leong (BA 1994 UTM)
and
Wilson Wong (BSc 1986)

Philippines

Dr. Genandrialine L. Peralta
(MASc 1994, PhD 1997)

Russia (Moscow)

Tomas Fregman (BCom 1999
VIC)

Saudi Arabia, Bahrain, Qatar, Oman, United Arab Emirates
Raj Malik

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 (HBSc 1999 UC)

Trinidad
Angini Mohammed (BA 1994 VIC)

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

Vietnam
Francis Uy

Appendix I

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