

<b>SUBJECT</b>	<b>DEVELOPMENT &amp; ALUMNI ENGAGEMENT YEAR-END REPORT FY 17-18</b>
<b>MEETING DATE</b>	<b>JUNE 14, 2018</b>

Forwarded to the Board of Governors on the Recommendation of the President

**APPROVED FOR  
SUBMISSION**




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Santa J. Ono, President and Vice-Chancellor

**FOR INFORMATION**

<b>Report Date</b>	May 18, 2018
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**Presented By** Jeff Todd, Interim Vice-President Development & Alumni Engagement and Executive Director, *alumni UBC*  
 Hillary Gosselin, Managing Director, Development

**EXECUTIVE SUMMARY**

Over the past year, \$202.7 million was *raised* in support of UBC priorities – an 11% increase over the previous year. Funds raised is a standard measurement of achievement and is comprised of outright gifts plus commitments made in FY18 with multi-year payments.

\$217.4 million was *received* during the fiscal year, which is the highest annual result ever recorded. Funds received is measured as FY18 outright gifts and payments on commitments from previous years.

FY18 represented the first year of implementation for *alumni UBC's* new five-year strategic plan, *Connecting Forward*. The plan's two strategic imperatives are the cumulative number of unique alumni engaged and the number of alumni who demonstrate a deeper commitment to UBC through their actions. Strong on both fronts, 70,007 alumni were engaged, surpassing a goal of 67,000, while 13,133 were engaged at a deeper level.

**INSTITUTIONAL STRATEGIC PRIORITIES SUPPORTED**

- Learning     
  Research     
  Innovation     
  Engagement     
  International  
 (Internal / External)

or  Operational

<b>DESCRIPTION &amp; RATIONALE</b>	Development & Alumni Engagement provides a fiscal year-end report to the Board of Governors on key results, impact and initiatives.
<b>BENEFITS</b> Learning, Research, Financial, Sustainability & Reputational	<p>Over 19,000 annual gifts contribute to UBC’s margin of excellence by investing in student support, research, and community engagement.</p> <p>With more than 70,000 alumni involved in the life of the university each year, UBC’s alumni contribute to the reputation of the University through their professional activities and community commitments. With more than 328,000 alumni – they are UBC’s largest constituent group.</p>

<b>Previous Report Date</b>	September 12, 2017 (FY 16/17 YE)
<b>Decision</b>	For Information
<b>Action / Follow Up</b>	
<b>Previous Report Date</b>	December 6, 2016 (FY 16/17 Q2)
<b>Decision</b>	For Information
<b>Action / Follow Up</b>	
<b>Previous Report Date</b>	June 7, 2016 (FY 15/16 YE)
<b>Decision</b>	For Information
<b>Action / Follow Up</b>	
<b>Previous Report Date</b>	December 3, 2015 (FY 15/16 Q2)
<b>Decision</b>	For Information
<b>Action / Follow Up</b>	

# DEVELOPMENT AND ALUMNI ENGAGEMENT

## FY 17-18 Year End Report to the UBC Board of Governors

### BACKGROUND

Development and Alumni Engagement (DAE) fosters engagement with alumni, friends and organizations and actively connects donor passions to solicit gifts in support of UBC's goals. This engagement and support has a direct impact on the success of UBC, its faculty, and its students.

At the conclusion of each fiscal year, DAE presents key results and impacts to UBC's Board of Governors.

### OVERALL RESULTS

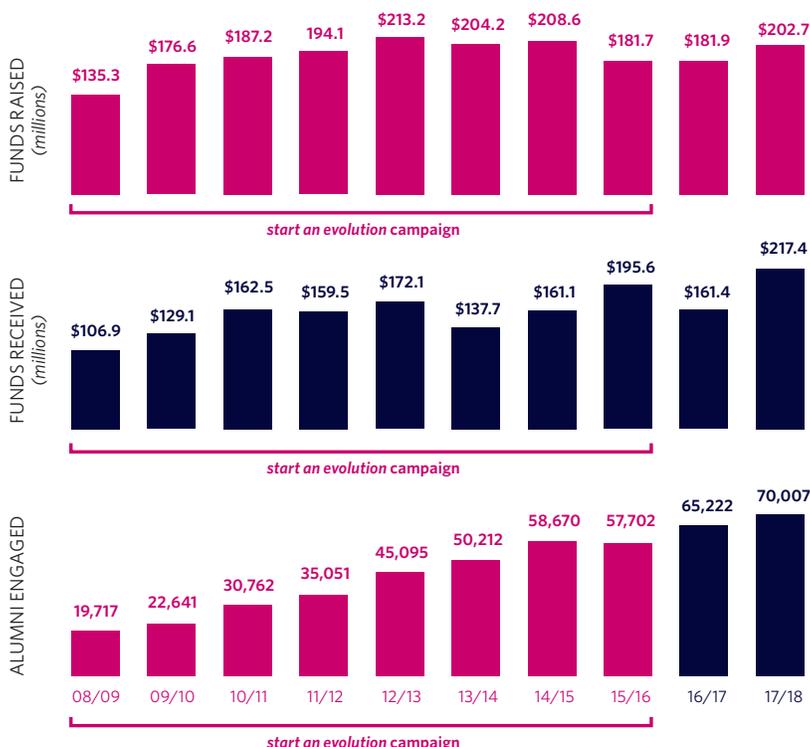
Fundraising (development) at UBC is focused on personal solicitation of major gifts (\$25K+) through professional staff, supported by annual broad-based solicitations through digital, mail, and phone platforms.

**Over the past year, \$202.7 million was raised in support of UBC priorities – an 11% increase over the previous year.** Funds raised is a standard measurement of achievement and is comprised of outright gifts plus commitments made in FY18 with multi-year payments. In addition, \$19.2 million in future estate gifts were recorded which are not represented in the funds raised totals.

**\$217.4 million was received during the fiscal year, which is the highest annual result ever recorded.** Funds received is measured as FY18 outright gifts and payments on commitments from previous years.

**70,007 alumni were engaged, surpassing a goal of 67,000, while 13,133 of those were engaged in deeper levels of commitment.** FY18 represented the first year of the implementation of *alumni UBC's* new five-year strategic plan, *Connecting Forward*. The plan's two key metrics are the number of unique alumni engaged and the number of alumni who demonstrate a deeper commitment to UBC through their actions.

To help frame the context of these achievements, a ten-year history is provided below:



# DEVELOPMENT AND ALUMNI ENGAGEMENT

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## DEVELOPMENT

### BLUE & GOLD CAMPAIGN FOR STUDENTS

The Blue & Gold Campaign for Students, the most ambitious campaign for students in UBC's history, was developed and launched in late November to align with GivingTuesday, an internationally recognized day of giving. The campaign, a UBC priority, seeks to raise \$100 million over three years. The focus is on student awards and support for enriched educational experiences with priorities on removing financial barriers and recognizing and recruiting excellence. There are also opportunities to support awards specifically for Canadian Indigenous students.

At the conclusion of the first year, \$31.6 million was raised from more than 9,000 gifts resulting in 113 new awards established. UBC offered matching funds of \$5 million for new endowed gifts to select Blue & Gold Campaign priorities which have helped leverage donations.

An example of support to the campaign is represented by alumnus the Honourable D. Ross Fitzpatrick, and his wife Linda, who donated \$250,000 to create the Ross and Linda Fitzpatrick Centennial Scholars Endowment fund. This will be awarded to incoming students to UBC Okanagan who demonstrate academic excellence, leadership, and financial need.

"I was able to get my education thanks to bursaries and scholarships like the one we're creating today... I can't think of a more fulfilling pursuit than to offer the opportunity of a university education to those who may otherwise not have the financial means."

~ **Ross Fitzpatrick**, BCom'58, LLD'12



### TRANSFORMATIONAL GIFT

One of the highlights of the year was the \$24 million gift from businessman, philanthropist, and alumnus, Edwin S.H. Leong, to support the Edwin S.H. Leong Healthy Aging Program. The largest gift ever committed by an individual to the Faculty of Medicine, it will expand research aimed at helping people live longer and enjoy a better quality of life in their later years.

"My wish is for everybody to live long and die peacefully, and I believe healthy aging is the key to that... This is an investment in people, and I have great confidence that by bringing together and supporting the brightest people in this field, UBC will be able to show us the way."

~ **Edwin S. H. Leong**, BSc'73



# DEVELOPMENT AND ALUMNI ENGAGEMENT

## FUNDS RAISED FOR CAMPUS, FACULTY, & UNIT

DAE reports out on funds raised from all development units, including specialized programs, as designated to each campus or faculty (unit). Please see Figure 1 for a detailed breakdown.

A highlight for the Faculty of Arts last year was a contribution towards the \$10 million gift, comprised of cash and in-kind support, from the late Elspeth McConnell and the Doggone Foundation to the Museum of Anthropology in support of the new Elspeth McConnell Gallery of Northwest Coast Masterworks. MOA is now home to a significant new collection of 301 historical and contemporary Indigenous artworks. The gallery currently features the voices of contemporary Indigenous artists who speak of the objects as teachers, belongings, and even legal documents.



Tlingit ladle, c. 1850-1880 Mountain sheep horn  
MOA # 3260/45

**FIGURE 1**

CAMPUS, FACULTY, & UNIT	FUNDS RAISED
UBC Okanagan	7,547,714
UBC Vancouver	
Peter A. Allard School of Law	3,371,506
Applied Science	20,015,299
Arts	13,932,337
Athletics and Recreation	6,488,126
Dentistry	2,112,041
Education	1,850,749
Forestry	4,145,025
Land and Food Systems	7,803,589
Library	1,236,060
Medicine	81,145,167
Pharmaceutical Sciences	1,663,909
Sauder School of Business	5,799,865
Science	19,367,684
Campus-Wide Support*	26,253,986
<b>Total</b>	<b>\$202,733,057</b>

\*Campus-Wide Support reflects gifts not captured within a specific campus, faculty or unit or gifts that cross multiple areas.

# DEVELOPMENT AND ALUMNI ENGAGEMENT

## FUNDS RAISED BY TYPE OF DONOR AND DESIGNATION OF GIFT

The type of donor defines the individuals and organizations who committed the gift while the designation of gift reflects where the gift was directed. In FY18, individuals, including alumni and friends, represent 45% of the funds raised and 77% of the number of gifts. An example of this is reflected in the contributions from the Patrick and Beryl Campbell Charitable Trust.

Alumnus Patrick Campbell and his wife, Beryl, never forgot that education was the starting point for their rich and adventurous lives. Their family gave \$1.3 million in the mid 1990s to support students and research in multiple disciplines across UBC. More than 20 years later, through the Patrick and Beryl Campbell Charitable Trust, the family has continued this legacy and honoured their memory by investing \$200,000 in their existing endowments, and \$250,000 to establish the endowed Patrick and Beryl Campbell Centennial Leaders award for students who show academic merit, community leadership and demonstrate financial need.



Beryl Campbell and Patrick Campbell, B.A.Sc.'47

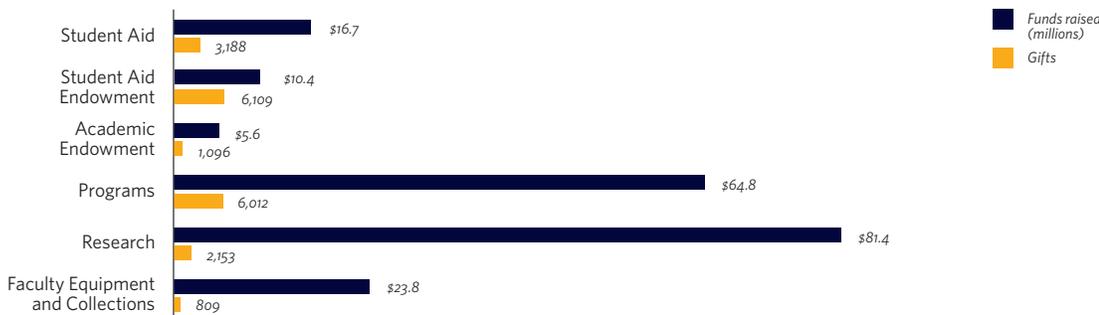
In FY18, the area with the highest number of gifts was student awards, a reflection of the success of the Blue & Gold Campaign for Students and overall interest in student support. Research was the largest single area of funds raised with \$81.4 million, followed by programs at \$64.8 million. An example of supported programs is UBC's Indigenous Community Planning Program in the School of Community and Regional Planning, a partnership with the Musqueam Indian Band, which will train planners to support First Nations communities in achieving their own aspirations for land stewardship thanks to the support from the Real Estate Foundation of BC's \$500,000 donation.

The breakdown of the type of donor (who committed the gift) and the designation of gift (where it is directed) is broken down below:

### Funds Raised by Type of Donor



### Funds Raised by Designation of Gift

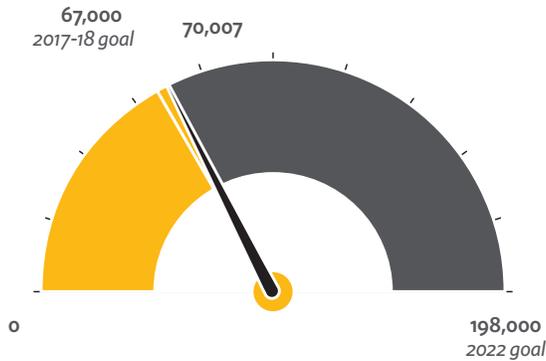


# DEVELOPMENT AND ALUMNI ENGAGEMENT

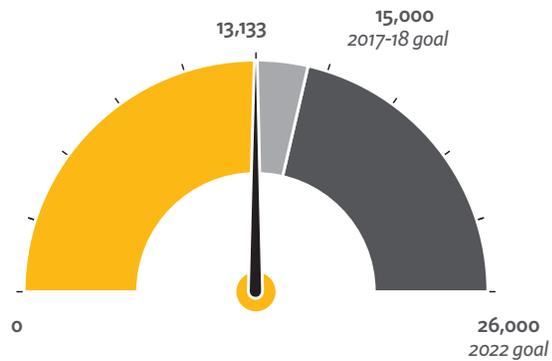
## ALUMNI ENGAGEMENT

*alumni UBC* completed the first year of implementation of its new strategic plan, *Connecting Forward*. There are two strategic imperatives set out in the plan: broad and deep engagement with alumni. Broad engagement, a metric introduced as part of the *start an evolution* campaign, focuses on the effective use of technology and digital platforms to both inform and deliver resources to UBC alumni. FY18 was a record year with 70,007 alumni engaged or 21%. Deep engagement, a new metric, measures the engagement of alumni who take some action (volunteerism, giving, etc) in support of UBC.

Cumulative number of unique alumni engaged



Number of alumni with deeper engagement



## ALUMNI UBC 100

A highlight of the past year was celebrating *alumni UBC's* 100th year since the first group of graduates formed the association on May 4, 1917. As part of this significant year, the goal was to make 100,000 connections with alumni through various activities including reunions, a global alumni map, and the 100 Dinners initiative, where alumni could host or take part in a dinner with their fellow alumni. The result was more than 160,000 connections as demonstrated in the chart below.

<i>alumni UBC 100</i>	TOTAL
Global Alumni Map	4,833
100 Dinners	943
Alumni Day	1,173
Reunions	1,929
Events	21,311
Media	63,566
Benefits & Services	35,798
Welcome Centre	4,818
Volunteer & Donate	13,133
Social Media	15,721
<b>Total</b>	<b>163,225</b>

100 Dinners

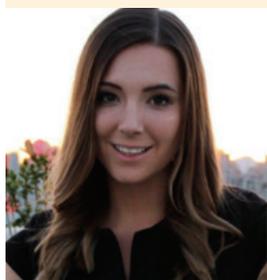


# DEVELOPMENT AND ALUMNI ENGAGEMENT

## ENGAGEMENT BY CAMPUS AND FACULTY, AND ENGAGEMENT DRIVERS

The number of alumni engaged by campus and faculty is recorded and measured along with the number of contactable alumni and percentage engaged. This is broken down further in Figure 2. Alumni engaged in athletics is represented in the faculty of graduation. The activity which drives the engagement is also recorded – see Figure 3. The highest areas were online publications including *Trek Online* (30%), event attendees (16.8%) and contact updates (14.6%).

Examples of the impact of engagement with alumni are highlighted by Faculty of Arts alumna and current Peter A. Allard Law student, Michelle Perini (BA'15), and Scott McLeman (BSc'98, LLB'04).



"I have been consistently overwhelmed by the positive effects alumni engagement has on our community. After spearheading the Allard Law Mentorship Program, I learned how generous alumni are in giving back, and how integral their insights are to student development. Without them, our law school experience would be incomplete."

- Michelle Perini, BA'15  
current Peter A. Allard School of Law student



"My wife, Elizabeth, and I both completed two degrees at UBC and we owe much of our success to our UBC education and experiences. Many years ago, my mentors His Honour Doug Mitchell Q.C. and Her Honour Lois Mitchell inspired me to volunteer with UBC and I saw firsthand how incredibly generous the Mitchells were with their time and energy. I am honoured to volunteer at UBC as required and endeavour to accomplish a fraction of what the Mitchells have done for UBC."

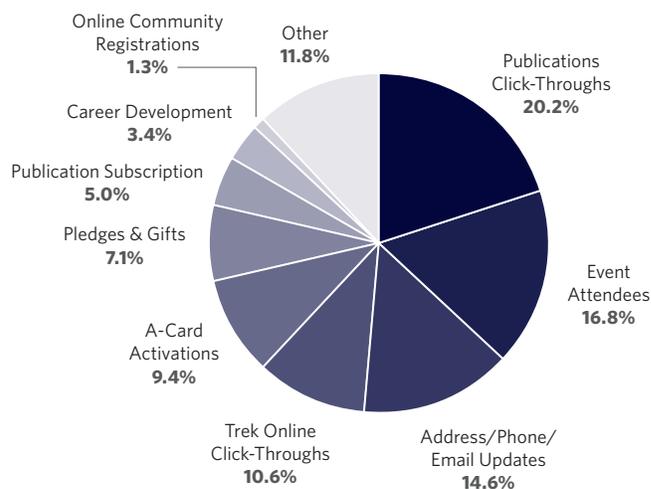
- Scott McLeman, BSc'98, LLB'04

**FIGURE 2**  
Alumni Engaged by Campus and Faculty

	ENGAGED ALUMNI	# PRIMARY CONTACTABLE ALUMNI	% ENGAGED
UBC Okanagan	2,936	13,836	21%
UBC Vancouver			
Peter A. Allard School of Law	3,857	9,734	40%
Applied Science	10,381	34,471	30%
Arts	13,373	69,826	19%
Dentistry	1,425	2,709	53%
Education	7,264	43,273	17%
Forestry	1,964	5,044	39%
Land and Food Systems	2,357	8,127	29%
Medicine	6,013	13,827	43%
Pharmaceutical Sciences	1,874	5,328	35%
Sauder School of Business	9,778	31,738	31%
Science	9,502	35,956	26%
Other	70	227	31%
<b>Total</b>	<b>70,794</b>	<b>274,096</b>	<b>26%</b>

\*Numbers above reflect results as at April 1, 2018

**FIGURE 3**  
Engagement Drivers



# DEVELOPMENT AND ALUMNI ENGAGEMENT

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## FOCUS FOR FY19

The focus for FY19 will be on raising \$200 million for UBC priorities and to engage 72,000 individual alumni of whom 15,000 demonstrate a deeper commitment to UBC.

DAE will continue to leverage the Blue & Gold Campaign for Students and complete activities associated with *alumni UBC 100*.

To support the activities above, DAE will build awareness and support of UBC's new strategic plan *Shaping UBC's Next Century* with alumni and donors and align its initiatives and priority projects with our own activities. Alumni engagement depth and breadth strategies will be expanded as *alumni UBC* continues to operationalize *Connecting Forward*. DAE will also prepare for the transition of leadership to a new Vice-President for the portfolio.