



**SUBJECT** DEVELOPMENT AND ALUMNI ENGAGEMENT (DAE) QUARTER 2 FY19 PROGRESS REPORT TO THE PEOPLE, COMMUNITY & INTERNATIONAL COMMITTEE

**MEETING DATE** NOVEMBER 26, 2018

Forwarded on the Recommendation of the President

**APPROVED FOR SUBMISSION**

Santa J. Ono, President and Vice-Chancellor

FOR INFORMATION

**Report Date** November 8, 2018

**Presented By** Heather McCaw, Vice-President Development & Alumni Engagement  
Jeff Todd, Associate Vice-President Alumni and Executive Director, *alumni UBC*  
Hillary Gosselin, Managing Director, Development

**EXECUTIVE SUMMARY**

As of Quarter 2, \$78.6 million has been raised in support of UBC priorities. These results are ahead of last year at this time and on par with the three year average. Funds raised is a standard measurement of achievement and is comprised of outright gifts plus commitments made in FY19 with multi-year payments. In its second year, the Blue & Gold Campaign for Students continues to receive a positive response with \$45.9 million raised from more than 14,600 gifts.

In the second year of the *alumni UBC* strategic plan, *Connecting Forward*, 40,793 alumni have been engaged through broad-based engagement as of Quarter 2, slightly ahead of last year at this time. 6,283 of those engaged represent alumni who have taken some form of action in support of UBC.

**Attachments**

- 1. DAE Quarter 2 FY19 Progress Report to the People, Community & International Committee

**INSTITUTIONAL STRATEGIC PRIORITIES SUPPORTED**

Learning       Research       Innovation       Engagement (Internal / External)       International

or  Operational

**DESCRIPTION & RATIONALE** Development and Alumni Engagement reports semi-annually on its progress to UBC’s Board of Governors at Quarter 2 and fiscal year-end.

**BENEFITS** Over 19,000 annual gifts contribute to UBC’s margin of excellence by investing in Learning, Research, Financial, Sustainability & Reputational UBC priorities in support of students, faculty, research and learning. 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 335,000 alumni – they are UBC’s largest constituent group.

<b>Previous Report Date</b>	June 14, 2018 (FY 17/18 YE)
<b>Decision</b>	For Information
<b>Action / Follow Up</b>	
<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>	

# DEVELOPMENT AND ALUMNI ENGAGEMENT

## Quarter 2 FY19 Progress Report to the People, Community & International Committee

### BACKGROUND

Development and Alumni Engagement (DAE) works with individuals, corporations, foundations and organizations to solicit gifts in support of UBC priorities, and to provide advocacy for and engagement with the university in collaboration with *alumni UBC*. DAE reports semi-annually on its progress to UBC's Board of Governors at Quarter 2 and fiscal year-end.

### DEVELOPMENT RESULTS

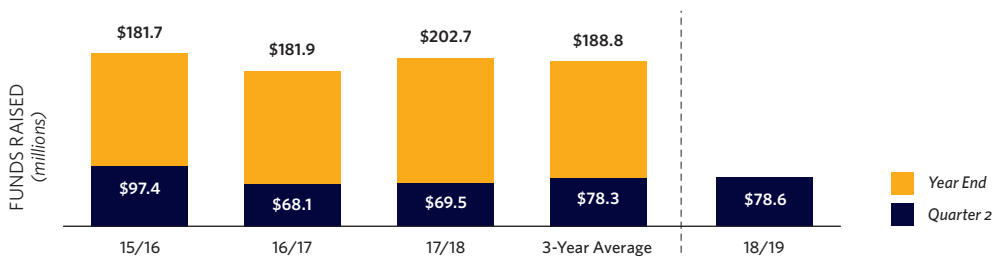
Development at UBC is focused on personal solicitation of major gifts (\$25K+) through professional staff, supported by annual broad-based solicitations through digital, mail, and phone platforms.

**Funds raised** is a standard measurement of achievement and is comprised of outright gifts plus commitments made in FY19 with multi-year payments.

**FY19 Goal:** \$200 million

*As UBC fundraising consists largely of major gifts, results during the year can vary due to the timing of large and transformational pledges and gifts.*

### RESULTS



# DEVELOPMENT AND ALUMNI ENGAGEMENT

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## BLUE & GOLD CAMPAIGN FOR STUDENTS

There has been continued success in maintaining the momentum of the Blue & Gold Campaign for Students in the donor and alumni community. The campaign was launched last fiscal year with the objective to raise \$100 million over three years with a focus on student awards and support for enriched educational experiences.

The results have been positive:

- \$45.9 million raised from more than 14,600 gifts
- Favorable response from UBC alumni who have contributed more than 60% of the gifts made
- \$589,874 raised from more than 3,000 gifts for the Blue & Gold Bursary, a pooled endowment fund established to provide support for deserving students with demonstrated financial need
- Within two months of the campaign launch, the full \$5 million of UBC matching funds was identified for discussion with potential donors
- Using British Columbia Graduate Scholarship as leverage for donors, more than \$800,000 has been raised for graduate awards through this program
- A Blue & Gold communications campaign was prepared to run from October 2018 - February 2019 to capitalize on the awareness created by the UBC brand campaign

## SELECT ACTIVITY HIGHLIGHTS

- Continued development of supporting documents and tools to facilitate discussions with donors regarding the UBC Responsible Investment Policy, the environmental, social and governance (ESG) principles of the Main Endowment Pool and the Sustainable Future Pool
- Hosted *Uniquely UBC* programs for select members of recognition societies featuring important topics, such as the role of higher education in rethinking, reframing, and restarting the path forward with Indigenous communities including a tour of the Indian Residential School History and Dialogue Centre

# DEVELOPMENT AND ALUMNI ENGAGEMENT

## ALUMNI ENGAGEMENT RESULTS

Alumni engagement is guided by *alumni UBC's* strategic plan, *Connecting Forward*, which is in its second year of implementation, along with strategy 18 of UBC's strategic plan, *Shaping UBC's Next Century*.

*alumni UBC's* two strategic imperatives are broad alumni engagement and deeper engagement:

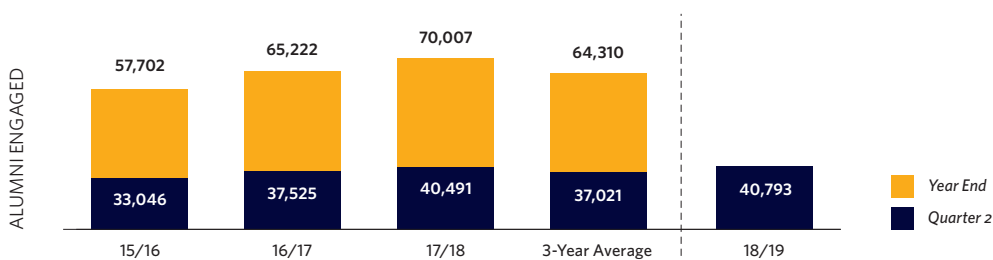
**Broad engagement** is represented through program participation and the effective use of technology and communications across digital and print platforms to both inform and deliver resources to UBC alumni.

**FY19 Annual Goal:** 72,000

**FY19 Cumulative Goal:** 99,688 (YTD 88,988)

**Strategic Plan (Cumulative Goal):** 198,000

### RESULTS

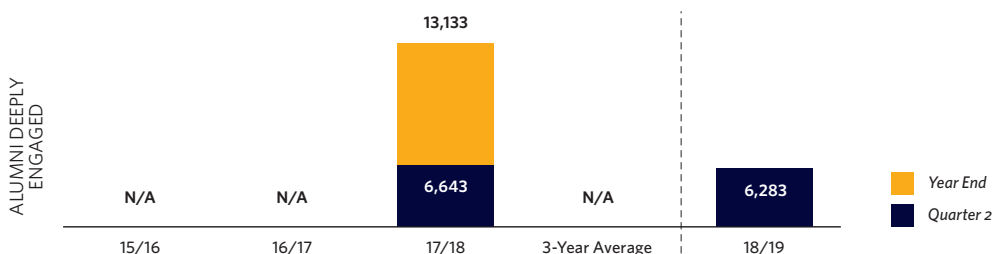


**Deeper engagement** represents alumni who take some form of action in support of UBC (i.e. volunteerism, donating, etc.).

**FY19 Goal:** 16,500

**Strategic Plan (Annual Goal):** 26,000

### RESULTS



Deeper engagement is a new measurement of alumni engagement introduced in FY18 as part of the *alumni UBC* strategic plan, *Connecting Forward*.

## SELECT ACTIVITY HIGHLIGHTS

- Welcomed 13,000 new alumni at spring commencement in Vancouver and the Okanagan
- Appointed new *alumni UBC* Board Chair, Randy Findlay, BAsC'73, PEng ICD.D, following the September 22nd *alumni UBC* AGM
- Launched first Homecoming at the Okanagan campus in addition to hosting Alumni Day at Homecoming on the Vancouver campus

# DEVELOPMENT AND ALUMNI ENGAGEMENT

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## DAE FOCUS FOR THE REMAINDER OF FY19

- Reach \$200 million goal for UBC priorities
- Engage 72,000 individual alumni of whom 16,500 demonstrate a deeper commitment to UBC
- Continue to maintain success and momentum of the Blue & Gold Campaign for Students
- Build awareness and support of UBC's new strategic plan, *Shaping UBC's Next Century*, with alumni and donors and align DAE activities with its initiatives and priorities
- Continue to operationalize *alumni UBC* strategic plan, *Connecting Forward*, with a focus on deeper engagement and business revenue
- Submit budget request to align with the growth plan presented at the request of the joint People, Community & International Committee and Finance Committee of the Board of Governors in September 2018