Advancing Queen’s and the School of Graduate Studies

T.J. Harris  Vice-Principal (Advancement)

&

Professor of Chemical Engineering

May 9, 2012
1. What is “Advancement”?  
2. Advancement’s Mission  
3. Campaign Fundamentals  
4. Priorities for School of Graduate Studies
A Common Misperception…

You mean “Advancement” is more than “fundraising”?
Model for integrated Advancement

The Advancement function at Queen’s is:

- Advancement Services
- Marketing & Communications
- Alumni Relations
- Development

“Centralized-decentralized” model: central coordination, decentralized function in faculties / schools and (some) departments
Advancement’s mission at work looks like this…

New home for medicine

John (Meds’59), and Lily Wong

The power of philanthropy
Engaging benefactors in the academic life of Queen’s
and this...

Drew Feustel: astronaut, alumnus, mentor, guest speaker: coming to campus Nov 17

CONGRATULATIONS
to alumnus Andrew (Drew) Feustel, PhD’95, and the entire crew of Endeavour’s STS-134 mission.

For 170 years Queen’s University has been educating people with an ambitious spirit who want to learn, discover, think and do. People like Drew.

www.queensu.ca Kingston, Ontario, Canada

The power of voluntarism: engaging volunteers in Queen’s academic heart
The Honourable John Ross Matheson, Arts’40, dedicates a tree in City Park to honour the Gaels Vanier Cup 2009 football team.
Advancement Services

• **Advancement Technology Services**
  – Systems and Infrastructure
  – Business Analysis

• **Gift Services**
  – Accepting, processing, reporting and subsequently receipting all gift-based revenue for the Office of Advancement

• **Prospect Research and Constituent Data Management**
  – Prospect identification and research in support of fundraising goals
  – Maintain, build and coordinate constituent data as it relates to Queen’s University

**Contact:** Steve.Hornsby@queensu.ca
Advancement Services can help you with:

• Understanding Canada Revenue Agency rules and regulations

• Thanking donors to your school
Marketing and Communications can help you with:

- Pitching your faculty's expertise to the media
- Helping your experts get into breaking news stories
- Media training
  - how to prepare for a media interview
  - what to expect during the interview
  - how to write/speak in clear language
- Writing and distributing news stories about success stories -- research, awards, profiles etc…
- Promoting your event to local media
Creative Services can help you with:

• Visual and Brand Standards
• Graphic Design

• Brand positioning and targeting your message to your audiences
• Signage and Stationary
• Print and production
Marketing and Communications

• **Communications:**
  – External Communications strategies for faculties and units to raise profile
  – Internal Communications – eQueen's, and Queen's News and Media website
  – News and Media Services – pitching faculty to national and international media
  – Media Training
  – Crisis and Issue Management for senior leadership and faculty
  – *Queen's Alumni Review*

• **Marketing and Electronic Communications:**
  – Brand Management and strategic marketing guidance
  – Visual Identity Management
  – Queen's Webmaster – Home Page
  – Queen's official social media platform management
  – Project management: writing and strategy for targeted initiatives for faculties and units by audience
  – Electronic communications: website development, videos, blogs, etc.

• **Queen's Creative Services:**
  – Graphic Designers for both print and web
  – Photographer – Art Direction
  – Stationary and signage
  – Diplomas and Convocation Programs
  – Printing and Production Services

**Contact:** Helena.Debnam@queensu.ca
Alumni Relations can help you with:

• Building volunteer engagement
• Connecting your students with accomplished alumni
• Connecting your faculty/school with alumni through lifelong learning
• Promoting your faculty through Alumni Association Awards
• Planning and staging a special event
Alumni Relations

• Volunteer Relations
  – Queen’s University Alumni Association (QUAA)
  – Queen’s Student Alumni Association (QSAA)
  – The Branch Network of the QUAA
• Alumni Education & Travel
• Alumni Reunions
• Alumni Communications
• Affinity Partnerships
• Special Events

Contact: Judith.Brown@queensu.ca
Development can help you with:

• **Fundraising for approved fundraising priorities**

• **Consulting re: other initiatives from time to time**
Development: major areas of support

Funds raised support:
• Capital projects
  – (new Medical building, Goodes Hall, Chernoff Hall, Beamish-Munro Hall, Queen’s Centre, etc.)
• Faculty positions
  – (e.g. Chairs, Fellowships)
• Curriculum development
• Student assistance
• Queen’s is among the top 5 schools in Canada in terms of the size of its endowment per student
• Currently stands at approximately $650 M and generates 4% payout to Queen’s – about $26 M per year

Philanthropy is key to Queen’s ongoing success
Development

• Major donations
• Annual donations
  – Queen’s Mail & Telephone program
  – Commemorative Giving
  – Class Giving, etc.
• Estate donations
• Faculty / School-specific donations
• Benefactor relations and stewardship
• Campaign office

Contact: Tom.Hewitt@queensu.ca
Faculties / Schools and Advancement: a Partnership

Each of Advancement’s 4 Departments partners with faculties / schools and departments in a host of ways

So does the Office of the Vice-Principal
The Advancement Cycle

Informing about mission and vision

Involving in life and work

INFORM

INVEST

INVOLVE

Increases likelihood of investment
Advancement

• Does not identify institutional priorities, nor rank their importance

• Works with the Principal and the Provost to complete a transparent process of identifying and aligning the university’s known and emerging priorities with advancement activities

• As priorities are identified, the contribution of Advancement is to tell the story of these priorities, animate them for key audiences, and secure funding
Vice-Principal (Advancement)

• Presents philanthropic opportunities to prospective donors

• Connects faculty and department heads with alumni, donors and prospective donors

• Facilitates inter-departmental collaboration, e.g. joint proposals

• Speaks at Departmental special events, e.g. Chemistry Innovation Council October
Union Street Team

• Created in January 2012
• Provides Advancement support to areas of the institution that contribute to the full student learning experience outside of the classroom
• Operates much like a faculty/school-based advancement unit
• Mandate areas: Athletics & Recreation, Queen’s Library & Archives, School of Graduate Studies, Student Assistance
• Meg Einarson providing leadership to the team
Campaign Objectives

1. To raise $500 million for university priorities with aspirations beyond this

2. To increase the profile of Queen’s
II. Proposed Timeline

• May 1, 2006 campaign counting started

• 10-year span proposed

• Proposed end date is 2016

• Coincides with Queen’s 175th anniversary
III. Proposed Goal

- Proposed Goal: $500 million
- Donated to date: $283 million (57% of goal) as of April 30, 2012
- Remaining: $217 million
Original capacity analysis completed by Marts & Lundy in September 2009

Built on an analysis of baseline giving and Major Gift potential

Analysis has been adjusted to current timeframe

Original analysis placed the Campaign’s potential at $750-$850 million (included future/planned gifts)
Analysis of Potential at the Major & Principal Gift Level

- Major and principal gift benefactors respond well to campaigns that have a compelling vision and specific priorities

- Research has identified:
  - 2,900 prospective benefactors
  - capacity to donate $50+ K.

- Comprehensive major gift analysis suggests:
  - low yield of $536 M
  - high-yield of $645 M
### Major Prospect Analysis

<table>
<thead>
<tr>
<th>Capacity ($)</th>
<th># of Prospects</th>
<th>Conversion Ratio</th>
<th>Low Yield ($)</th>
<th>High Yield ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>50,000,000 +</td>
<td>1</td>
<td></td>
<td>25,000,000</td>
<td>25,000,000</td>
</tr>
<tr>
<td>25,000,000 - 50,000,000</td>
<td>5</td>
<td>3:1</td>
<td>41,667,000</td>
<td>62,500,000</td>
</tr>
<tr>
<td>10,000,000 - 25,000,000</td>
<td>5</td>
<td>3:1</td>
<td>16,667,000</td>
<td>29,167,000</td>
</tr>
<tr>
<td>5,000,000 - 10,000,000</td>
<td>6</td>
<td>3:1</td>
<td>10,000,000</td>
<td>15,000,000</td>
</tr>
<tr>
<td>1,000,000 - 5,000,000</td>
<td>65</td>
<td>3:1</td>
<td>21,667,000</td>
<td>65,000,000</td>
</tr>
<tr>
<td>500,000 - 1,000,000</td>
<td>59</td>
<td>5:1</td>
<td>5,900,000</td>
<td>8,850,000</td>
</tr>
<tr>
<td>250,000 - 500,000</td>
<td>127</td>
<td>5:1</td>
<td>6,350,000</td>
<td>9,525,000</td>
</tr>
<tr>
<td>100,000 - 250,000</td>
<td>733</td>
<td>8:1</td>
<td>9,163,000</td>
<td>16,034,000</td>
</tr>
<tr>
<td>50,000 - 100,000</td>
<td>1,871</td>
<td>10:1</td>
<td>9,355,000</td>
<td>14,033,000</td>
</tr>
<tr>
<td><strong>Capacity</strong></td>
<td><strong>2,872</strong></td>
<td></td>
<td><strong>145,769,000</strong></td>
<td><strong>245,109,000</strong></td>
</tr>
</tbody>
</table>

#### Notes:
- Low & high yield are conservative analysis
Public Launch of the Campaign

- September 29 at Grant Hall

- Three regional launches throughout month of October:
  - Toronto
  - Ottawa
  - Calgary

- Marketing & communications efforts aimed at leveraging the profile of key gifts
Priorities for School of Graduate Studies
Attracting the Very Best Graduate Students

Increase the number of tri-council award holders (NSERC, SSHRC & CIHR) by 10% from 274 to 300 by 2015

- Top up incoming graduate students who bring tri-council funding by $5,000 and $7,500 for Master’s and doctoral students, respectively, for one year only.

- Extend the top-up for each year that they hold the award (three years)

- Provide equivalent support in their 4th year of study. This would give prospective students the most attractive funding package in the country.

Cost: $400,000/year incrementing over three years ($1,200,000 – full implementation)
Double our funding support for our students to present their work at the best academic conferences (to $400,000)

Cost per year: $200,000
Attracting the Very Best Graduate Students

Enhance our reputation for excellent doctoral training (satisfaction in program and graduate experience) and expand our global presence and impact through exchanges and attracting students from abroad.

• Introduce 15 global leader awards to support international exchange opportunities for doctoral students for periods of 1 – 3 terms.

Cost: Up to $15,000/award; $225,000/year
Attracting the Very Best Graduate Students

Enhance our reputation for excellent doctoral training (satisfaction in program and graduate experience) and expand our global presence and impact through exchanges and attracting students from abroad.

• Introduce 5 Academic Excellence Awards
  • Attract top candidates from Canada and around the globe who we would recruit with the intent of nominating them for prestigious Vanier Awards.
  • The Academic Excellence Awards would leverage our competitiveness for Vanier Awards and serve to attract highly qualified domestic and international students.

Cost: 5 awards @ $40,000 each per year for 4 years
  Year 1 cost: $200,000 ($800,000 full implementation)
Partnering with Development …

• Indicate your willingness to meet with potential Benefactors to talk about your work

• Identify potential Benefactors if possible

You will NOT be required to ask for money. If you have a burning desire to do so we will try to accommodate!
Questions