



SFU

UNIVERSITY SECRETARIAT

S.08-113

MEMO

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TO	Senate
FROM	Alison Watt, Director, University Secretariat
RE	President's Agenda 2008/2009
DATE	1 October, 2008

FOR INFORMATION

The Board of Governors approved the President's Agenda for 2008/09 at its meeting on 25 September, 2008, and it is forwarded to Senate for information.

Part 1 Agenda for 2008/09

Part 2 Report on quantitative indicators for 2007/08



SIMON FRASER UNIVERSITY
THINKING OF THE WORLD



SFU

MICHAEL STEVENSON, PHD
PRESIDENT AND VICE-CHANCELLOR

Part 1 Agenda for 2008/09

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July 3, 2008

Dr. Nancy McKinstry, Chair
Board of Governors
Simon Fraser University
Burnaby, BC V5A 1S6

Dear Nancy,

In keeping with my previous agenda statements, this supplementary report reiterates the following broad objectives for SFU:

Increasing differentiation of programmes and enrolment.
Increasing intensity of research.
Deeper engagement in community.

As discussed at the Board Strategy Session, my priorities for the coming year will be:

- (1) Further development of the health sciences, especially in the following areas:
 - a. Public and population health;
 - b. Mental health;
 - c. Medicinal chemistry and infectious disease;
 - d. Bioinformatics and Personalized Medicine;
 - e. Nanomedicine.
- (2) Implementation of the plan for the new Faculty of Applied Sciences, with emphasis on:
 - a. Mechatronics;
 - b. Medical Engineering;
 - c. Environmental Engineering;
 - d. Visual Analytics.
- (3) Implementation of the plan for the new Faculty of Communication, Art and Technology, with emphasis on:
 - a. Community outreach in the Downtown East Side;
 - b. Cultural Events management for SFU at Woodward's;
 - c. Integration of arts community members as adjunct faculty;
 - d. Partnerships with cultural and communications sectors of the Vancouver business community.

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SIMON FRASER UNIVERSITY

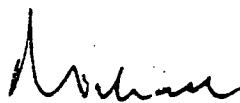
- (4) Follow-up on Planning for new Faculty of Environment and Sustainability, with focus on:
- a. Development of Environmental Science programme;
 - b. New professional or semi-professional programmes;
 - c. Expanded recruitment and enrolment.

In addition to these dimensions of planning for greater differentiation of undergraduate and graduate programmes, I will continue to give priority attention to improving the student experience at SFU and improving SFU's profile in community and government relations. The concentration of attention with respect to student experience will be on the improvement of student spaces and the improvement of extra-curricular, cultural programming. The focus with respect to community and government relations will be on the follow-up to the Board special committee's survey and communications exercise.

Finally, the major preoccupation in the coming year will be on resource and budget planning. The overriding priority is to obtain relief from the current budget cuts, and to minimize cuts going forward. A top priority is a proposal for the expansion of enrolment and the building of a new science building at the Surrey campus.

I look forward to continuing consultation and advice in pursuing these objectives.

Yours sincerely,



Michael Stevenson
President and Vice-Chancellor

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SFU

MICHAEL STEVENSON, PHD
PRESIDENT AND VICE-CHANCELLOR

Part 2 Report on quantitative indicators for 2007/08

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July 3, 2008

Dr. Nancy McKinstry, Chair
Board of Governors
Simon Fraser University
Burnaby, BC V5A 1S6

Dear Nancy,

As required by the Board's May 2008 resolution concerning my performance review, I am submitting my annual report. I also attach a copy of my agenda for the coming year, which I discussed at our recent Board Strategy Session. This report is organized around the general criteria stated in the Board policy.

Academic Leadership

As indicated in my agenda for last year, I have focused on initiatives building SFU's profile in three areas: health sciences, environment and cultural change.

I have been intimately involved throughout the past academic year in the deliberations over the reorganization of the university's Faculty structure. These deliberations have focused on the creation of two new Faculties to address the areas of environment and culture, with a third, more narrowly defined Faculty of Applied Sciences to focus on computing and engineering science. Although much of the credit for the successful conclusion of these deliberations lies with the VP Academic and others, I think I may claim some share of the credit for the leadership required to initiate and conclude this process.

Throughout the past year, I have also maintained a focus on the further elaboration of our interests in the health sciences. Again, I share the credit with many others, but I believe we have made significant strides forward, including strong partnerships with Fraser Health Authority, with the Provincial Health Services Authority and with St. Paul's Hospital and its Foundation.

The priority focus on these areas is consistent with my general interest over the last eight years in advocating and advancing the differentiation and research intensity of SFU. I believe I played a role in securing recent government commitments to new investments in graduate enrolment, and while we did not do as well as we hoped in



SIMON FRASER UNIVERSITY
THINKING OF THE WORLD

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the competition for new enrolment and funding, we significantly expanded graduate enrolment last year. The attached documentation from Mario Pinto also indicates the significant successes in increasing research activity and funding throughout the university last year.

Aside from my work within the university, I have played a role in academic leadership within provincial, national and international associations. I have been chair of AUCC's standing committee on Economic Issues and Funding, and I am now also chair of the Council of Western Canadian University Presidents, the regional organization represented on the AUCC Board of Directors. I have been a panelist at the annual meetings of the AUCC, and have hosted and presented a paper at the Trans-Atlantic Dialogue of European Rectors and American and Canadian University Presidents, held recently at the Wosk Centre. I am also active on the Boards of MITACS and GENOME BC, which serve important academic and research communities. Finally, I have been an active player in TUPC and closely involved in the development of the BC universities' advocacy agenda, budget planning, and post-budget communications and government relations. While I am depressed at our failure to dissuade government from its withdrawals of funding, I believe I have been a high profile advocate of the interests of SFU and BC's other universities.

External and Internal Community Relations

Over the past year, I have continued to place emphasis on external community relations. I have actively supported the Board initiative to review our activity in this area. I have played a role on the Boards of the Vancouver Board of Trade and the BC Business Council. I have been very active in meetings and in residence dinners held for members of the external community, as my periodic reports to the Board will show. I have been active on our Liaison Committee with the City of Burnaby, the Advisory Board to SFU Surrey, the University's India Strategy Advisory Board, and Geoff Plant's Civil City Steering Committee. I have maintained active connections to the Mayors of Vancouver, Burnaby and Surrey. I have maintained regular contact with the Minister, Deputy Minister and Assistant Deputy Minister of Advanced Education, and have had meetings with MLAs of both parties, as well as with more than a half dozen other cabinet Ministers in addition to the Premier during the past year. One unusual aspect of government relations that touches on my responsibilities to improve the public knowledge and image of SFU has been my active involvement in the Premier's missions over the last year to India, and subsequently to Korea and China.

Within the university, I have continued to host dinners and receptions for academic and non-academic staff, for the Student Society, for the Athletic Teams, and for select groups within the community deserving of special recognition. I have also continued to play an active part in arranging symposia and dinners for the nascent Burnaby Mountain College, and have participated in numerous academic symposia organized by colleagues in different departments across the university. I continue to invest considerable energy in relations with employee groups, especially in monthly meetings with the President of SFUFA and separately with the SFUFA executive. I

consider my obligations as Chair of Senate among my highest priorities, and I trust that Senators and members of the university community would concur that I "encourage collegiality and productive relationships...with students, staff and faculty..."

Financial Resource Management

Although budgeting and financial management were particularly challenging during the past year, especially in the set-up of the budget for this current financial year, I believe I have played a useful leadership role in this area. Although much of the responsibility here is shared with the VPs and Deans, I play an important role in the public explanation of our financial predicament, and in advocating particular strategies for adjusting to it. I also play a vital role in managing internal conflicts over resource allocations. Finally, I play a key oversight role in respect of advancement as well as the key role in large gift fundraising, and I believe that the attached reports indicate another very successful year in this respect.

Although I am confident about my managerial record in this area, I recognize, and I hope the Board will recognize the very serious concerns raised over the last year about our financial situation. Our budget planning process, leading up to the draft budget prepared for Board approval in the Spring, was complicated by the great difficulty of handling unfunded inflation, and the necessity of a significant cut to preexisting budgets. Added to this complexity was a very late realization that misestimates of revenue assumptions for 07-08 required significant cash calls in order to balance for that year. Finally, the surprise government announcements of significant withdrawals of funding commitments for 08-09 just prior to the new financial year seriously threatened our ongoing work.

In these circumstances, there is widespread disillusionment within the university about our future, and I cannot be sanguine about SFU's future financial position.

Human Resource Management and Development

Perhaps the key responsibility in this area over the last year has been in developing a succession strategy for the university's leadership team. I chaired and managed the search for a new Vice-President Academic. I was actively involved in the searches for new Deans of Business and Education. With the very strong appointments last year of the Associate Vice-President Finance and Deans of Arts and Social Sciences and Health Sciences, I believe the senior group is stronger than it has been for decades. Nevertheless, the interim arrangements or extensions of decanal appointments in Business, Education, Science and Continuing Studies will require close attention in the coming year. And, of course, I will be working with the Board to ensure that a smooth process begins next year for my own succession.

General

I believe the most significant successes of the past year are as follows:

1. the approval of our plans for the relocation of the School for Contemporary Arts as part of the Woodward's redevelopment project;
2. the approval of the Faculty Restructuring proposals;

Dr. Nancy McKinstry

July 3, 2008

3. the second consecutive year of fundraising more than \$30 million;
4. a 3.2% increase in revenue from research grants and contracts excluding infrastructure awards from CFI and BCKDF;
5. improvement in our communications with a roughly 20% increase in news coverage;
6. average grades for students entering directly from grade 12 continue to be in excess of 80% across all Faculties, despite continuing growth in enrolment coupled to demographic decline in BC's high school graduating class.

My agenda for next year builds on the momentum created this past year. I will focus on the development of niche programmes in health sciences, applied science, environmental science and sustainability, and communications arts and technology, with major efforts devoted to the successful expansion of the Vancouver campus at Woodward's and the development of a new science facility and expanded enrolment at Surrey. Sadly, the optimism underlying these goals must be tempered by the very pessimistic financial scenarios possible under current government budget commitments, and my major preoccupation has to be in the area of financial management next year.

I will be happy to discuss these matters further with you.

Yours sincerely,

Michael Stevenson
President and Vice-Chancellor

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Attachment

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SIMON FRASER UNIVERSITY
OFFICE OF THE VICE-PRESIDENT, RESEARCH

Memorandum

TO: Michael Stevenson
President & Vice-Chancellor

FROM: B. Mario Pinto
Vice-President, Research

RE: Performance Criteria

DATE: July 2, 2008

The following are the relevant data for those performance indicators related to my portfolio.

1. Research Intensity

Objective: To increase the scope, impact, and competitiveness of SFU's research activity.

Indicators:

(a) **The percent increase in research funding 2007 to 2008:** According to the CAUBO figures, our sponsored research funding has grown from \$69 million in budget year 2005/06 to \$77.6 million in 2006/07 and **\$75.5 million** in 2007/08. It is important to note that total research revenues can be subject to significant fluctuations because of funding variations through the CFI/BCKDF major projects. For example, in 2006/07, the total CFI/BCKDF component was \$13.6M, whereas in 2007/08, the figure was 12.8M—an 8.7% decrease in CFI and a 0.1% increase in BCKDF funding. Overall, research revenue grew by 3.2% this year when CFI/BCKDF revenue is excluded.

(b) **The percent of faculty successful in holding NSERC, SSHRC, Canada Council or CIHR grants, 2007 to 2008:**

NSERC In the 2007/2008 NSERC Discovery Research Grants competition, SFU had a success rate of 84% as compared to the national average of 70%. In the Research Tools & Instruments competition, SFU had a success rate of 58% as compared to the national success rate of 46%. Overall, the percent of faculty members by Faculty holding NSERC grants in 2007/08 was as follows: Applied Sciences, 65% (107 current faculty members holding NSERC grants/165 faculty members); Arts & Social Sciences, 6% (23/357); Business Administration, 7% (5/75); Education, 2% (1/62), Health Sciences, 0% (0/25); Science 94% (171/182).

SSHRC In the 2007/08 SSHRC Standard Research Grants competition, SFU had a success rate of 52% compared to the national average of 33%. Overall, the percent of faculty members holding SSHRC grants in 2007/08 was as follows: Applied Sciences, 12% (20 current faculty members holding SSHRC grants/165 faculty members); Arts & Social Sciences, 29% (105/357); Business Administration, 32% (24/75); Education, 40% (25/62), Health Sciences, 12% (3/25); Science 0% (0/182).

CIHR For the 2007/08 Operating Grants competition, SFU had a success rate of 18% compared to the national average of 25%. Overall, the percent of faculty members holding CIHR

grants in 2007/08 was as follows: Applied Sciences, 5% (8 current faculty members holding CIHR grants/165 faculty members; Arts & Social Sciences, 2% (8/357); Business Administration, 0% (0/75); Education, 0% (0/62), Health Sciences, 24% (6/25); Science 9% (17/182).

The percent of faculty members holding NSERC, SSHRC, Canada Research Chairs program, and CIHR grants in 2007/08, broken down by Faculty are as follows: Applied Sciences, 78% (128/165); Arts & Social Sciences, 36% (128/357); Business Administration, 40% (30/75); Education, 42% (26/62); Health Sciences, 32% (8/25); Science, 98% (179/182). (Data provided by Institutional Research and Planning with source data from the Office of Research Services.)



Agency	SFU Success Rate	National Average
Social Sciences and Humanities Research Council (SSHRC) Standard Grants	52%	33%
Natural Sciences and Engineering Research Council (NSERC) Discovery Grants	84%	70%
NSERC Research Tools and Instruments Grants	58%	48%
NSERC Idea to Innovation (I2I) Grants (cumulative 2003-08)	87%	47%*
Canadian Institutes of Health Research (CIHR) Operating Grants	18%	25%



*The I2I program does not operate on a "competition" basis

(c) The number of peer reviewed publications—ranking of SFU in humanities and social sciences, and natural sciences:

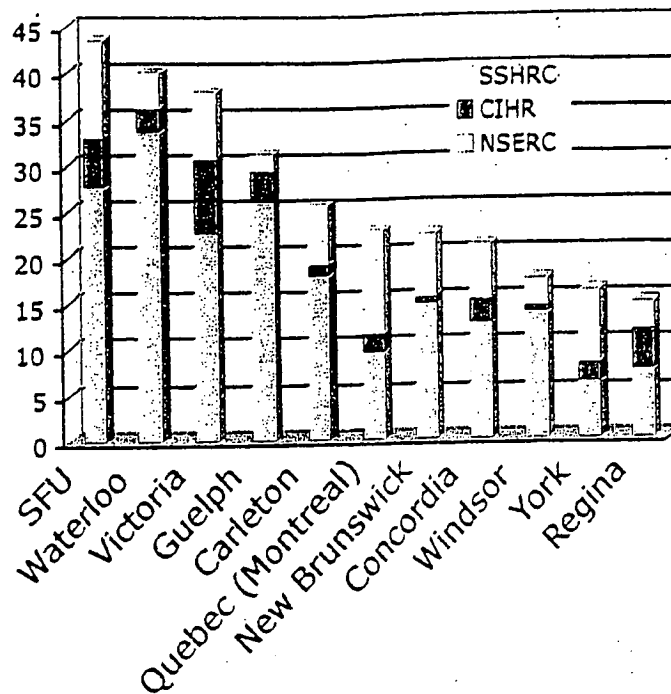
The *Canadian Universities Publications 2006* study by ReSearch InfoSource Inc. named SFU the **top comprehensive university in Canada for publication effectiveness**, a measure of the quality and impact of research at each university (11 were included in the "comprehensive" category) relative to its cost. Data analysis was performed on information compiled from approximately 6,000 leading international peer-reviewed journals covering the natural sciences, health sciences, social sciences and humanities for the period 1999-2004. This report appears every second year, so statistics from 2004 will appear in early 2009.

Data from ReSearch InfoSource's 2007 report *Canada's Top Research Universities* indicates that SFU has the highest research intensity (i.e., Tri Council research funding per faculty member) of comprehensive universities (see following figure).

Research Intensity

(total Tri-Council research income per full-time faculty member)

In thousands of dollars





SIMON FRASER UNIVERSITY
INSTITUTIONAL RESEARCH AND PLANNING

To: Dr. Michael Stevenson
President and Vice-Chancellor

From: Jacy Lee
Director, Institutional Research &
Planning

Subject: Performance Indicators

Date: July 4, 2008

As requested, the data for the three performance indicators related to the objective, "To achieve targets for domestic and international enrollment growth without sacrificing quality" are as follows:

- a) Percentage of domestic enrollment target achieved, 2007/08: 100.9% (i.e., actual undergraduate, domestic program FTEs as a percent of undergraduate FTEs funded by the Ministry of Advanced Education).
- b) Percentage of international enrollment target achieved, 2007/08: 99.6% (i.e., actual undergraduate, international program FTEs as a percent of undergraduate, international program FTEs approved by Senate).
- c) GPA average for undergraduate entrance qualifications by Faculty (for BC 12 students registered at SFU in 2007/08):
 - I. Applied Sciences: 80.6%
 - II. Arts and Social Sciences: 81.0%
 - III. Business: 88.4%
 - IV. Health Sciences: 80.3%
 - V. Sciences: 82.8%

The source for the actual data above is OASIS as at the official reporting date each semester.

**SFU**

OFFICE OF THE PRESIDENT

MEMO

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ATTENTION Michael Stevenson

FROM Mavis MacMillen, Executive Assistant *mavis*

RE President's Performance Indicators

DATE July 2, 2008

Your letter to the Board Chair in September of 2006 identified three quantitative performance expectations that are to form a part of your annual performance review. One of the measures for raising the profile of SFU in the general public and among community leaders is the number of contacts made with government and community leaders. I have reviewed your bi-monthly President's Activity Briefings for the period July 2007 through June 2008 and report the following statistics:

	Government Contacts	Community Contacts
July 2007 – June 2008	81	319

Last year's statistics were:

July 2006 – June 2007	58	269
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On a comparative basis, this represents a 40% increase in government contacts and a 19% increase in community contacts during the 2007/2008 year.

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SIMON FRASER UNIVERSITY
THINKING OF THE WORLD

Public Affairs and Media Relations

The MEDIA COUNT

In the 12 months from 01 June 2007 through 31 May 2008, SFU's media-monitoring service recorded 8,072 mentions in news media, up by 19.8% from the same period of 2006-7.

That meant we averaged 22.1 hits a day, compared with 18.5 the previous year.

Meanwhile, UBC was up by 17.8% from a year earlier, with an average of 47.7 hits a day compared to 40.5 in the previous year. UVic slipped to 24.1 mentions a day from 25.4.

The increase in SFU's media-count is attributable in large part to increased time spent on making direct "pitch calls" to media outlets to push stories about SFU people and programs. That's an arduous and challenging process, but has clearly paid off during the year.

As well, SFU's office of Public Affairs and Media Relations (PAMR) has stepped up the proactive provision to media of contact info for SFU "experts" who can comment on news of the day. PAMR strives to anticipate the news, and to guide reporters to experts before the stories break.

PAMR has also worked hard and successfully to build relationships with ethnic media in the Lower Mainland. This because something like one million people in the region do not read, watch or listen to the "mainstream" media outlets.

2007-8 print media references:

(In parentheses, the item count for the same period of 2006-7)

Month	SFU		UBC		UVic	
June 2007	611	(532)	932	(832)	660	(869)
July 2007	563	(496)	1186	(1011)	485	(462)
August 2007	560	(615)	1181	(1056)	708	(696)
September 2007	665	(620)	1562	(1214)	683	(875)
October 2007	578	(642)	1399	(1466)	491	(823)
November 2007	677	(638)	1455	(1692)	802	(940)
December 2007	444	(387)	980	(1102)	516	(673)
January 2008	750	(481)	1693	(1157)	823	(754)
February 2008	749	(503)	1776	(1209)	919	(802)
March 2008	657	(618)	1743	(1604)	785	(864)
April 2008	992	(580)	1666	(1161)	1013	(771)
May 2008	826	(628)	1822	(1278)	907	(727)
Totals	8072	(6740)	17395	(14782)	8792	(9256)

NOTES

1. The statistics on the preceding page are seriously understated. They are limited to *Canadian print media* with online outlets selected and monitored by a single service, *Infomart*. Broadcast media are not covered, nor are magazines, ethnic media outlets or foreign media. Thus, for example, the figures for May 2008 exclude scores of foreign media hits from all around the world on the Human Security Report issued by SFU's School for International Studies.

According to public-relations veterans, the numbers above should be multiplied by at least four to approach the reality in Canadian media alone. But we find the understated numbers useful for watching trends.

2. UVic's coverage is heavily 'local', in the *Victoria Times Colonist* and Vancouver Island community papers. It does not get the national or province-wide exposure that we do at SFU.
3. While continued improvement in the media-count is a constant priority, it is worth noting that UBC has twice as many full-time-equivalent students as we do and is a bigger enterprise over-all with total revenues three times ours.
As well, UBC has 2.5 times the faculty, and their research funding is six times ours. It is also heavily biased towards media-popular medical research. As research generates a lot of media coverage, the results we've been able to achieve with such a comparably small corps of researchers speak volumes to the quality of SFU faculty.
SFU's office of Public Affairs and Media Relations has a complement of 9.4 FTEs. UVic, meanwhile, has 15 FTEs in its Communications office. And UBC's Public Affairs department has 23 (13 FTEs on staff and six under contract at UBC Vancouver, and four FTEs at UBC Okanagan).

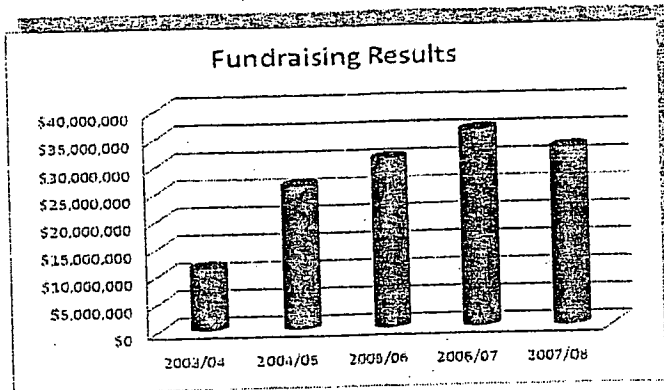


University Advancement Fundraising Summary 2007/08

1.0 Introduction

University Advancement achieved its second highest fundraising results in 2007/08, raising \$32,307,087 in gifts and pledges, 92% of its \$35 million goal.

Despite slightly decreased gifts and pledges through the annual campaign, and the lack of an exceptional gift, such as the Blusson donation of 2006/07, our donors continued to generously support university priorities.

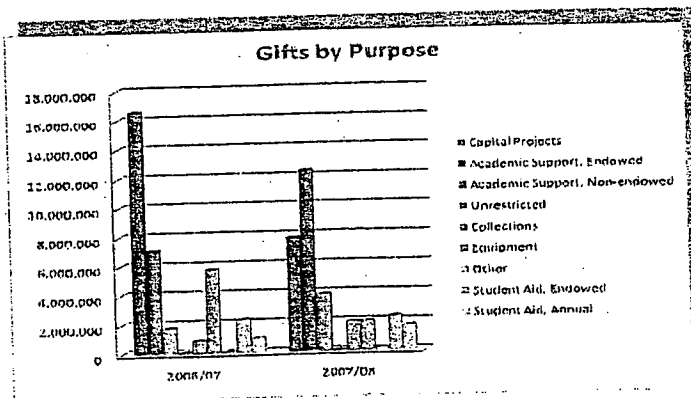


2.0 Results

Fundraising activity declined 8.4% in 2007/08 from the 2006/07 record high of \$35,256,104.

However, fundraising exclusive of special gifts (\$10 million+) actually increased 29% over 2006/07.

This included a 31% increase of gifts less than \$1 million, \$14,016,553 in 2007/08 as compared with \$10,676,868 in 2006/07. In addition, the university received cash of \$21,304,364.



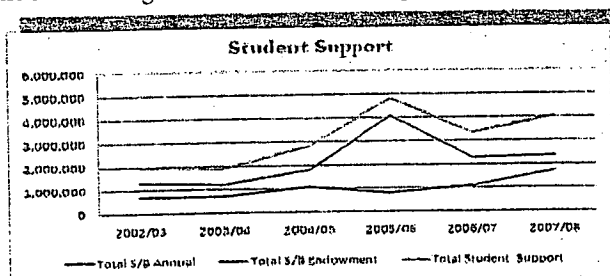


Gifts by Purpose		
	2006/07	2007/08
Capital Projects	\$ 16,573,914	\$ 7,915,900
Academic Support, Endowed	\$ 7,043,453	\$ 12,386,311
Academic Support, Non-endowed	\$ 1,704,821	\$ 3,881,007
Unrestricted	\$ 37,941	\$ 20,360
Collections	\$ 888,748	\$ 1,992,322
Equipment	\$ 5,669,665	\$ 1,989,798
Other	\$ 101,956	\$ 191,150
Student Aid, Endowed	\$ 2,257,424	\$ 2,350,861
Student Aid, Annual	\$ 987,182	\$ 1,679,378
	\$ 35,256,104	\$ 32,307,087

2.1 **Capital Projects** This is one of three designation categories that showed a decline in donations. Even so, SFU received more than \$7.9 million in capital funding (including the \$4.9 million booked for the augmented value of a gift-in-kind of land), mainly to our School for the Contemporary Arts. Our focus for the coming year will be on raising the \$12 million required to complete the fundraising for the Contemporary Arts Building project.

2.2 **Academic Support** 2007/08 was a strong year for gifts to both endowed and non-endowed faculty support, with a total of \$16,267,318 coming in to support Chairs, Professorships, non-contract research, and research centres. Endowed Academic support increased by 76% while gifts to non-endowed academic support more than doubled over the previous year.

2.3 **Student Aid** 2007/08 saw a marked increase in gifts to student support. Both endowed and non-endowed categories increased, although non-endowed gifts showed a more significant gain. Overall, student funding received \$4,030,239, a 24% increase over 2006/07.



3.0 Notable Donations

SFU was the recipient of numerous remarkable gifts and pledges including:

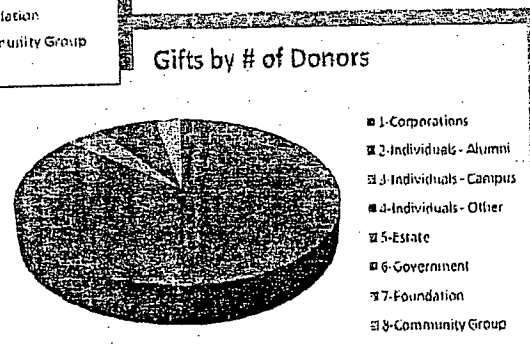
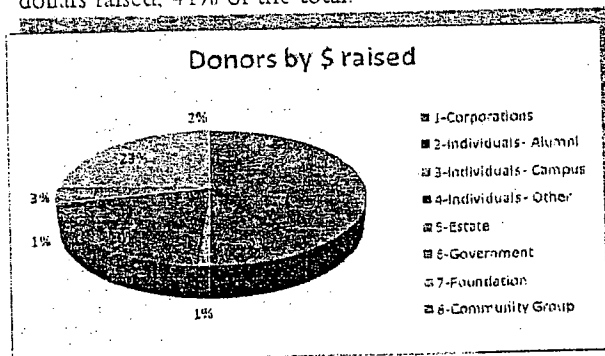
- \$1.5 million from Richard and Valerie Bradshaw for the Liber Ero Chair in Coastal Studies
- \$1 million from the Ministry of Children and Families to the Chair in Excellence in Autism Intervention
- \$500,000 from Len and Judi Libin for the Leadership Chair in Reducing Violence Among Children and Youth



- \$1.5 million from St. Paul's Hospital Foundation for the Chair in HIV/Aids Research
- \$3.128 million from St. Paul's Hospital Foundation, the Heart and Stroke Foundation and Pfizer for the Pfizer/Heart & Stroke Foundation BC & Yukon Chair in Cardiovascular Prevention Research
- \$1.5 million for the Containment Lab in Infectious Disease Research and \$2.5 million for the Mowafaghian Endowment in Children's Health Policy Research from the Djavad Mowafaghian Foundation
- A pledge of a gift of real estate valued at \$723,000 from Margaret T. Morgan, to benefit the Faculty of Arts and Social Sciences
- A pledge of \$1 million in real estate or cash from Dale Regehr, to benefit the Close to Home Scholarship Endowment at SFU Surrey
- A pledge of \$1 million from Mr. Sam Belzberg to the School for the Contemporary Arts Campaign.
- A previously reported gift of land to the School for the Contemporary Arts increased in value based on real estate appraisals.

4.0 SFU's Donors

2007/08's \$32,307,087 was donated via the generosity of 7,412 donors. The largest single group of donors is alumni. Corporations account for the largest portion of dollars raised, 41% of the total.





This year, SFU received no gifts or pledges of over \$5 million. A total of 56% of funds raised came from \$1million plus gifts.

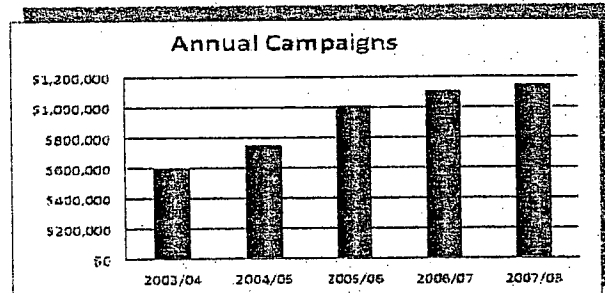
Gift Level	2007/08	Donors
<\$ 1,000	601,888	6833
\$ 1,000 - \$ 9,999	1,132,334	427
\$ 10,000 - \$ 24,999	872,727	63
\$ 25,000 - \$ 99,999	1,918,374	44
\$100,000 - \$499,999	5,426,676	28
\$500,000 - \$999,999	4,064,588	7
1M - 4.9M	18,290,500	10
Total	32,307,087	7,412

5.0 Gifts to Endowment

Gifts and pledges to endowment amounted to \$14,737,172, a 58% increase over the previous year.

6.0 Annual Programs

In 2006/07 University Advancement implemented an automated system for the alumni calling program replacing a paper-heavy manual calling system with state of the art computer software and screens that provide callers with critical



information at a glance. Although our investment has not yet provided an increase in dollars raised, we have greatly improved our contact rate, and hope to see fundraising increases in the next fiscal year. Our Annual Programs, including the Calling Program, Campus Appeal, and Annual Student Support Fundraising, contributed \$1,145,245 to the total.

7.0 Planned Giving Programs

The foundation of a comprehensive planned giving program was established this past year. First, a baseline for the accumulated total of all legacy expectancies, named the SFU Futurefund was researched and established at \$25,432,349 as of April 1, 2007. Additionally, 10 new planned giving brochures were researched, designed and published; a new planned giving web page was launched in September; and the first SFU Futures newsletter was mailed in November to 16,160 alumni, donors, retirees and friends.



There were 68 respondents to the newsletters who confirmed new expectancies of \$6.3 million by March 31, 2008 with potential for an additional \$3.7 million identified directly by donors or indirectly through donor's advisors. A pledge of \$723,000 in real estate was secured and assistance provided in securing another real estate gift/pledge of \$1 million. Significant progress has been made in establishing a self-insured gift annuity program, a first for a BC university.

Gifts of \$202,481 were received from estates.

8.0 Cost per dollar raised

University Advancement exceeded its budget by approximately \$32,613, or 1.3%, with total spending of \$2,588,975.91 on a budget of \$2,556,362.32. The cost to Advancement per dollar raised increased from last year's \$ 0.064 to \$0.08. Including Faculty expenses of \$481,215.67, the cost per dollar raised was \$0.095 as compared to \$0.078 in 2006/07. In both 2006/07 and 2007/08, University Advancement incurred a special fundraising cost. When added to our total costs, the \$550,000 in 2007/08 resulted in a cost per dollar raised of \$0.11. This year's actual costs per dollar raised are still well within fundraising best practices; many post-secondary fundraising operations spend between 10 and 15 cents per dollar raised.

9.0 University Advancement Productivity

Last year, we assessed our productivity at \$1.74 million for each qualifying advancement staff member (fundraisers, support staff, researchers). For fiscal 2007/08 productivity has dipped to \$1.5 million, still well above our "yardstick" of \$1 million per person.

10.0 Future Challenges

University Advancement's biggest challenges in the coming year include: managing expectations for philanthropic support to alleviate extraordinary budget pressures with no increases to staff complement, and maintaining competitive position in the market where major competitors are greatly ramping up fundraising capacity and targets. In particular, BC Children's Hospital Foundation and UBC are significantly increasing staff to support mega-campaigns of \$500 million or more (UBC is expected to launch a billion dollar campaign). SFU will need to explore new models for financing the University Advancement operation to remain competitive in this environment. Efforts to plan for the next major SFU campaign will continue with the development of a list of transformational opportunities to build on University strengths.