The Right Honourable Justin Trudeau welcomes attendees from across the globe to the University of Waterloo's Faculty of Mathematics' inaugural Women in Mathematics Virtual Celebration on May 12, 2020.

FY2020-2021 – Q3 Report
PERFORMANCE INDICATORS
MAY 1, 2020 to JANUARY 31, 2021

Office of Advancement
Faculty of Mathematics
University of Waterloo
Advancement Performance Indicators – Alumni Outreach & Engagement

Math Advancement were early adopters of the pandemic pivot, doing old things in new ways, and new things in interesting ways, to provide opportunities for alumni, students, faculty and staff to connect digitally. This included launching our affinity group, the Waterloo Women’s Impact Network (WWIN), on May 12th as part of our International Women in Math Day Summit. We rolled out a new e-community, Waterloo Math Digital Community (WMDC), and invited alumni to join in a virtual program of events to celebrate the Class of 2020. The Faculty also launched the #CoopChallenge which was quickly adopted by all Faculties in an effort to recruit new job placements to replace those lost due to COVID.

In Spring 2020, the Faculty of Mathematics engaged Grenzebach Glier & Associates in a comprehensive global survey of Faculty alumni. The primary goal of the survey was to gather data about the Faculty’s alumni community to encourage greater alumni engagement in everything from events to volunteerism to giving back to their Faculty. The survey investigated alumni attitudes towards the Faculty of Mathematics, preferences for engagement and communications, priority areas, donor motivations, and propensity for philanthropy. The results below show a great opportunity for further engagement and involvement with the Faculty.

ALUMNI DEMOGRAPHICS

Total Math Alumni 44,426

Living & Addressable 38,589

Contactable 20,588*

Global Alumni Distribution 108 countries

New Graduates 15,849 from the last decade

*Living and addressable alumni who have not ‘opted out’ of one or more institutional communications.

ALUMNI ATTITUDES ABOUT THE FACULTY OF MATHEMATICS

65% alumni feel moderately well-informed about alumni events and programming

35% express not feeling very informed

19% alumni donors state that they want more engagement

21% alumni non-donors state that they want more engagement

29% alumni outside of Canada want more engagement

24%+ of recent alumni desire more engagement

Current points of connection to the Faculty of Mathematics

45% Faculty website

34% visiting the campus informally
86% of respondents want to engage and stay informed of Faculty activities
54%+ Interested in hiring recently graduate students
47% of young alumni express interest in alumni volunteer days
50% of young alumni express interest in assisting in new student recruitment
81% of respondents indicated a regular email newsletter is the preferred form of receiving information from the Faculty
56% interested in supporting entrepreneurship and innovation in the Faculty
50% interested in supporting recruiting and retaining dedicated faculty
46% interested in supporting the future of work through online learning and education for all

DONOR EXPERIENCE & PHILANTHROPIC PROFILE

Reasons for giving:
39% affinity for the area of a gift
45% loyalty to Waterloo
34% understanding gift impact
43% a desire to give back
25% seeing gift impact is especially important for major donors
39% of donors have been giving exclusively to Math over the last 5 years
33% of donors consider Faculty to be their first or second giving priority
51% non-donors indicated top reason they do not support is because of other giving priorities
55% Healthcare, medicine, and healthcare advocacy are the top reported charitable priorities of alumni

ALUMNI ENGAGEMENT

5130 total event attendees
- Women in Math Virtual Celebration (May 12) – 444
- Alumni Virtual Celebration of the Math Class of 2020 (June 5) – 627
- Spring Convocation (June 19) – 1275
- Alumni Black and Gold Day @ Home (Sept. 19) – 215
- Fall Convocation (Oct. 24) - 2472
- WWIN Webinar Series: How Females are Growing the Start-up Landscape (November 18) - 97

854 total attendee follow up
- # of responses – 12
- # of meetings (video/phone) - 60
- # of personal letters to alumni - 14

394 total Faculty of volunteers
- Advancement volunteers - 69
- CEMC markers - 325
- IVW volunteer profiles - 8
Office of Advancement, Faculty of Mathematics

Advancement Performance Indicators – Advancement Communications

One of the goals for the upcoming campaign is to **strengthen the brand and reputation of Faculty of Mathematics across all sectors and audiences; locally, nationally and internationally**. To achieve this, Math Advancement focused on raising our profile through all our communications activities: impactful storytelling, engaging multichannel online content, our first alumni mailing in decades, podcast and media interviews, as well as the 2020 World Math Day joint letter from the President Hamdullahpur and Dean Giesbrecht. These communications initiatives are key for alumni engagement, support of Math priorities and stage-setting for our upcoming campaign.

**TABLE 1**

<table>
<thead>
<tr>
<th>Emails / Communications</th>
<th>recipients</th>
<th>unique opens</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>CEMC World Math Day</td>
<td>19,671</td>
<td>5,997</td>
<td>30%</td>
</tr>
<tr>
<td>CEMC Fundraising appeal</td>
<td>2,159</td>
<td>872</td>
<td>40%</td>
</tr>
<tr>
<td>Giving Tuesday email</td>
<td>16,846</td>
<td>5,513</td>
<td>33%</td>
</tr>
<tr>
<td>New Year Card</td>
<td>37,647</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- emailed</td>
<td>20,994</td>
<td>7,837</td>
<td>37%</td>
</tr>
<tr>
<td>- mailed</td>
<td>16,157</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- opt-back-ins</td>
<td>6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Math e-Ties (e-newsletter)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spring 2020</td>
<td>20,588</td>
<td>8,105</td>
<td>39%</td>
</tr>
<tr>
<td>Fall 2020</td>
<td>20,882</td>
<td>7,799</td>
<td>37%</td>
</tr>
</tbody>
</table>

**Website**

| Page views (not including e-ties) | 1667 |
| Faculty stories placed across sites | 7 |
| Alumni profiled                   | 18 |

**Community Building**

| Waterloo Math Digital Community | 40,660 profiles | 831 active users | 90 countries 60% |
| WWIN Newsletter                 | 233            | 139             |                |
| WWIN Webinar attendees          | 97             |                 |                |

**Stewardship**

| CEMC Impact Report - mailed     | 24*            | *many more delivered electronically. |
| Custom stewardship reports      | 25             |                                |
| Custom stewardship plans        | 2              |                                |
| Donor profiles                   | 10             |                                |

**Campaign**

| Case(s) for Support             | 2              |                                |
| Mini cases (2-pager)            | 3              |                                |
| Speaking / Briefing notes       | 16             |                                |
| Gift agreements                 | 16             | Total value of agreements: $879,998 |
FY2020-2021 – Q3 RESULTS
MAY 1, 2020 TO JANUARY 31, 2021

Advancement Performance Indicators – Development Performance

In FY2019–2020, the Faculty of Mathematics received $7,463,537 in philanthropic gifts ($5,264,853) and philanthropic research grants ($2,198,684) from individuals, foundations and corporations. This generous support from our 1,087 donors is advancing world-changing research across all departments and developing the next generation of talent in mathematics, computer science, and statistics.

It is promising to note that inspite of the existing economic uncertainty, current revenues show an 36% increase year over year, despite a 17% decrease in donors compared to last year. Additionally, Math donors reached out to support in new and creative ways including support of the Student Emergency Fund. Though Math alumni only made up 14% of the donors to the Fund, they accounted for 24% of all dollars raised. Alumni like Jim Mitchell, BSc ‘66, Bill Reeves, BMath ’74, and Ricki Blau stepped forward to provide critical student support in the form of two additional lecturers to assist students negatively impacted by the current pandemic. With the help of Associate Dean of Research and International Anita Layton, alumnus Rico Mariani, BMath ’88, funded the University’s first scholarship for Black and Indigenous Students. Finally, Francis Lee, BMath ’78, as well as Reeves and Blau were inaugural donors to the newly created, Faculty of Mathematics Co-op Fund which aims to provide meaningful experiential learning opportunities to Math students who experience challenges securing a placement and/or are interested in entrepreneurial or social entrepreneurship opportunities.

<table>
<thead>
<tr>
<th>TABLE 2</th>
<th>TOTAL GIFTS AND PLEDGES (AS OF JAN. 31, 2021)</th>
</tr>
</thead>
<tbody>
<tr>
<td>$2,500,000</td>
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</tr>
<tr>
<td>$2,000,000</td>
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<tr>
<td>$1,500,000</td>
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<td>$1,000,000</td>
<td></td>
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<tr>
<td>$500,000</td>
<td></td>
</tr>
<tr>
<td>$0</td>
<td></td>
</tr>
<tr>
<td>YTD total raised</td>
<td>$2,012,591</td>
</tr>
<tr>
<td>LYTD total raised</td>
<td>$1,294,181</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>TABLE 3</th>
<th>TOTAL DONORS (AS OF JAN. 31, 2021)</th>
</tr>
</thead>
<tbody>
<tr>
<td>820</td>
<td></td>
</tr>
<tr>
<td>800</td>
<td></td>
</tr>
<tr>
<td>780</td>
<td></td>
</tr>
<tr>
<td>760</td>
<td></td>
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<tr>
<td>740</td>
<td></td>
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<td>720</td>
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<td>680</td>
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</tr>
<tr>
<td>660</td>
<td></td>
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<tr>
<td>640</td>
<td></td>
</tr>
<tr>
<td>620</td>
<td></td>
</tr>
<tr>
<td>YTD # of donors</td>
<td>805</td>
</tr>
<tr>
<td>LYTD # of donors</td>
<td>689</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>TABLE 4</th>
<th>TOTAL GIFTS AND PLEDGES TO THE FACULTY OF MATHEMATICS (FY2015/16 TO 2019/20)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019 – 2020</td>
<td>Philanthropic research grants $5,057,835</td>
</tr>
<tr>
<td>2018 – 2019</td>
<td>Philanthropic gifts $3,342,113</td>
</tr>
<tr>
<td>2017 – 2018</td>
<td>$2,796,305</td>
</tr>
<tr>
<td>2016 – 2017</td>
<td>$2,796,633</td>
</tr>
<tr>
<td>2015 – 2016</td>
<td>$7,463,538</td>
</tr>
</tbody>
</table>

UNIVERSITY OF WATERLOO
FACULTY OF MATHEMATICS
TABLE 5  TOTAL FY20/21 GIFTS BY PRIORITY

- Academic program support: $796,959
- Infrastructure: $488,325
- Other program support: $667,122
- Philanthropic research grants: $1,699
- Student experience: $58,486

TABLE 6  FY20/21 DONORS BY CONSTITUENCY

- Alumni: 83%
- Parents: 4%
- Faculty & staff: 3%
- Corporations & foundations: 5%
- Friends: 5%

EXPENDABLE vs ENDOWED
Trust gifts (558) - $195,1892
Endowed gifts (146) - $174,907

TOTAL MATH FACULTY/STAFF GIVING TO STUDENT EMERGENCY FUND
Total donations received - $78,783
Total donors - 347

TOTAL MATH ALUMNI GIVING TO STUDENT EMERGENCY FUND
Total donations received - $146,510
Total donors - 295

TABLE 7  ADVANCEMENT TEAM GIVING IN FY20/21

- Donors (FY20/21): 100%
- Non-donors (FY20/21)

TABLE 8  ADV TEAM GIVING BY DESTINATION

- CEMC
- Coop
- Health services
- Math 4
- Scholarship
- Student emergency fund
- WWIN
- Unrestricted

LEGACY GIFTS
Planned gifts received (FY2019-20) - $4,070,000
Total planned gift expectancies - $34,524,500

TOTAL MATH FACULTY/STAFF GIVING TO STUDENT EMERGENCY FUND
Total donations received - $78,783
Total donors - 347

TOTAL MATH ALUMNI GIVING TO STUDENT EMERGENCY FUND
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UNIVERSITY OF WATERLOO
FACULTY OF MATHEMATICS
### TABLE 9
FACULTY OF MATHEMATICS FY20/21 Q3 PIPELINE HEALTH REPORT

<table>
<thead>
<tr>
<th>Activity</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Advancement meetings</td>
<td>197</td>
</tr>
<tr>
<td>Meeting including Dean</td>
<td>21</td>
</tr>
<tr>
<td>Meetings including Math faculty</td>
<td>29</td>
</tr>
<tr>
<td>Dean’s Top 10 identified</td>
<td>9</td>
</tr>
<tr>
<td>Deans Top 30 identified</td>
<td>19</td>
</tr>
<tr>
<td>Deans Top 50 identified</td>
<td>22</td>
</tr>
<tr>
<td>Solicitations by the Dean</td>
<td>3</td>
</tr>
<tr>
<td>Research profiles / dossiers</td>
<td>49</td>
</tr>
<tr>
<td>Dean thank you letters/emails</td>
<td>74</td>
</tr>
</tbody>
</table>

#### Alumni Pool
- All Math alumni: 44,425
- Contactable alumni: 20,588
- Capacity $100K+: 8,987
- Capacity $1M+: 56
- $100K+ currently engaged: 20%

#### Proposal Pipeline
- Value of Asks Made: $15,215,000
- Value of Asks Ready: $15,677,500
- Projected Gift Closure in FY20/21: $1,376,200

#### Proposal Stage
- Total Active Proposals: 353
- # of Unqualified: 226
- # of Qualified: 103
- # of Response Pending: 13
- # of Accepted: 16
- Other - closed, declined etc.,: 2

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62 donors made their first gift to Math in FY20/21. These donations totalled $759,345.

Math alumni gave total of $599,808 to University-wide priorities including:
- academic program support ($208,304)
- infrastructure ($7,417)
- philanthropic research grants ($56,425)
- other program support ($112,743)
- student success ($200,350)

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#AmGoodAtMath
Waterloo Women's Impact Network