

# Development Office fonds

Compiled by Michelle Curran (2007)  
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**\*\*\* Institutional records -- researcher access subject to review \*\*\***

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# Fonds Description

**Development Office fonds.** – 1970-2005.

1.78 m of textual records.

12 video cassettes.

1 audio cassette.

## **Administrative History**

The University of British Columbia's Development Office was established in 1986/87 with a combination of funding from the university's General Purpose Operating Fund and cost recovery on donations to the campaign. The Development Office has been a part of External Affairs since 1999/2000. Its primary function is to advance the vision of the university by increasing private sector funding for campus initiatives. The office provides fundraising expertise and assistance as well as coordinating and integrating fundraising initiatives for the university community in order to achieve optimal long-term results with donors. Support for the university is received from individuals, corporations, government, foundations, and service organizations. The Development Office has been successful in establishing a strong base of ongoing donor support for UBC and in developing effective campus-based fundraising programs and approaches. The Office also raises money annually on behalf of UBC faculties, programs, and projects.

The Development Office includes the following five major units:

### **Faculty Fundraising**

The primary responsibilities of this unit are to generate revenue for case statement projects from fundraising activities and to build effective working relationships between the ongoing central development programs and campus and also between campus and the community. Work is conducted in a collaborative and coordinated fashion with other Development Office units, External Affairs, and the Alumni Association to maximize results for each campus-based development program.

### **Leadership Group and President's Circle Program**

The activities of the Leadership Group are focused on the identification, cultivation, solicitation, and stewardship of major donors who have the capacity and interest in supporting the mission of UBC. The President's Circle program, which is also part of the Leadership Unit, is designed to give special, individualized attention to each of these donors, including individuals, corporations, and foundations.

## Campaign Operations

The mandate of the Campaign Operations unit is to support the President, Vice President External Affairs and Director of Development in defining the strategic direction of UBC fundraising initiatives and implementing these initiatives accordingly. This may include direct responsibility in the areas of planning, budget, case statement development and market surveys as well as identifying the required resources, including volunteers and staffing. This unit also works directly with the Vice President External Affairs to identify potential sources of matching funds.

## Gift and Estate Planning and Awards

The Gift and Estate Planning and Awards unit's main function is the creation of both present and deferred gifts for the benefit of UBC. These gifts often involve elements of tax and estate planning.

## UBC Fund

The UBC Fund unit is a centralized service for the faculties and other university areas. Through collaboration with other External Affairs offices, this unit coordinates small to mid-size gift solicitations from individuals and organizations who have affinity to UBC, including: alumni, faculty and staff, students and parents, annual award donors, small to mid-size companies/organizations, students/graduates of UBC Certificate Programs and UBC Continuing Education, community members and friends, in memoriam donors, and other friends. This unit also collaborates with the Faculty Fund Raising unit to maximize donations to the faculties from their various constituencies and with the Gift and Estate Planning and Leadership Group on award gifts and in memoriam gifts.

## Scope and Content

Fonds consists of agendas, speeches, case statements, reports, reviews, protocols, proposals, plans, procedures, lists, estimates, projections, briefs, agreements, correspondence, outlines, campaign materials, training materials, research, donor information, invitations, notes, brochures, audio visual recordings, and photos. The fonds is arranged in six series: UBC President's Speeches, Organizational Planning, Development, and Operations; Correspondence; Leadership Unit, Audio Visual, and Photographs.

## Notes

Fonds consists of institutional records – access requests must be reviewed by the University's FOIPOP Coordinator.

Records were transferred to the University Archives by the Development Office Leadership Group in September 2006.

Further accruals are expected.

File list available.

## Series Descriptions

**UBC President's Speeches series.** – 1997-2002.

10 cm of textual materials.

Series consists of transcripts of speeches delivered by former UBC President Dr. Martha C. Piper at various functions associated with the Development Office.

Files are arranged in chronological order.

Box 1.

**Organizational Planning, Development, and Operations series.** – 1993-2001.

23 cm of textual records.

Series consists of records pertaining to the Development Office operating within the External Affairs division under the UBC mandate. There are three sub-series: Institutions, External Affairs, and Development Office.

Boxes 2-3.

**Institutions sub-series.** – 1998-2000.

1 cm of textual records.

Sub-series consists of a high-level organization chart, descriptions of board members, and UBC's academic plans.

Box 2(1-3).

**External Affairs sub-series.** – 1997-1999.

2.5 cm of textual records.

Sub-series consists of an organization chart, job descriptions, resumes, budgets, and policy manuals, all of which pertain specifically to the External Affairs division.

Box 2(4-6).

**Development Office sub-series.** – 1993-2001.

19.5 cm of textual records.

Sub-series consists of an organization chart, job descriptions, resumes, budgets, policies, work plans, protocols, case statements, outlines, and performance review forms.

Boxes 2(7-22), 3(1-4).

**Correspondence series.** -- 1988-2003.

30 cm of textual records.

Series consists of two sub-series: Peter W. Ufford and David Strangway Documents and Outgoing.

Boxes 4-5.

**Peter W. Ufford and David Strangway Documents sub-series.** – 1988-1996.

15 cm of textual records.

Sub-series consists of letters, faxes, and documents exchanged by Peter W. Ufford and David Strangway.

Box 4(1-6).

**Outgoing sub-series.** – 2002-2003.

15 cm of textual records.

Sub-series consists of outgoing emails, letters, faxes, and documents sent by the UBC Development Office.

Boxes 4(7-8), 5(1-5).

**Leadership Unit series.** – 1970-2000.

1.15 m of textual materials.

Series consists of the following three sub-series relating to the activities of the Leadership Unit within the Development Office: Initiatives, Campaigns, and Events; Data Base; and Subject Files.

Boxes 7-10.

**Initiatives, Campaigns, and Events sub-series.** -- 1970-2000.

54 cm of textual materials.

Sub-series consists of records relating to initiatives, campaigns, and events coordinated and sponsored by the Leadership Unit.

Box 7.

**Data Base sub-series.** – 1985-1999.

17 cm of textual materials.

Sub-series consists of records that were originally assembled as two-volume binders of materials relating to research as well as prospect and donor information.

Files are arranged according to original order.

Box 8.

**Subject Files sub-series.** – 1987-2000.

44 cm of textual materials.

Sub-series consists of records relating to funds, foundations, and the President's Circle and includes memos, notes, spreadsheets, faxes, proposals, and correspondence.

Files are arranged alphabetically.

Boxes 9-10.

**Audio Visual series.** – 2004-2005.

6 video cassettes: VHS.

6 video cassettes: Betacam SP.

1 audio cassette (14:50 min.).

Series consists of video and audio recordings of announcements regarding endowments and donations to UBC.

Recording times refer to the actual recordings, not the length of the tape.

Cassettes are stored and indexed separately as part of the Special Collections and University Archives Sound and Moving Image Collection.

**Photographs series.** – [1993-1997].

1 album ; 24 x 31 cm (10 photographs: b&w ; 23 photographs: col.)

20 photographs: 35 mm slides: col.  
ca. 250 photographs: col. negatives.  
ca. 150 photographs: col. print.

Series consists of negatives and photographic prints of the original St. John's College in Shanghai, China; of St. John's College at UBC; and of various ceremonies and events sponsored by the Development Office.

Box 11.

# File List

Box 1

## UBC PRESIDENT'S SPEECHES

- 1-1 Feb. 18, 1997 David Strangway, Ottawa Event (1997)
- 1-2 July 19, 1997 The Future of Education: UBC in the 21st Century (1997)
- 1-3 Jan. 25, 1997 Brainpower: The New Natural Resource (1997)
- 1-4 Sept. 25, 1997 The University of British Columbia - Think About It (1997)
- 1-5 Oct. 30, 1997 Vancouver and UBC ... Think About It (1997)
- 1-6 Dec. 5, 1997 Closing the Gap (1997)
- 1-7 April 21, 1998 Salvation Army Advisory Board Luncheon (1998)
- 1-8 May 19, 1998 MCP Remarks: Richmond Chamber of Commerce (1998)
- 1-9 June 9, 1998 UBC and the GVRD ... A Smart Region! (1998)
- 1-10 Sept. 14, 1998 UBC and Vancouver ... A Vision for the 21st Century (1998)
- 1-11 Nov. 10, 1998 President's Circle Dinner (1998)
- 1-12 Nov. 18, 1998 Philanthropy Day Breakfast (1998)
- 1-13 March 29, 1999 Historic and Monuments Board of Canada Commemorative Ceremony for Harvey Reginald (H.R.) MacMillan (1999)
- 1-14 May 30, 1999 Aga Khan Foundation Partnership Walk (1999)
- 1-15 June 8, 1999 Calgary Chamber of Commerce (1999)
- 1-16 Sept. 23, 1998 Heritage Circle Tea (1998)
- 1-17 Oct. 14, 1999 UBC's 1999 Annual General Meeting (1999)
- 1-18 Oct. 14, 1999 Alumni Recognition and Sports Hall of Fame Dinner (1999)
- 1-19 Oct. 17, 1999 Gairdner Awards / Celebration of Science Dinner (1999)
- 1-20 Oct. 18, 1999 Celebration of Science Symposium (1999)
- 1-21 Oct. 19, 1999 Vancouver Board of Trade Speech (1999)
- 1-22 Oct. 20, 1999 Quarter Century Club (1999)
- 1-23 Nov. 25, 1999 Maury Young Memorial Service (1999)
- 1-24 Oct. 25, 1999 Technology Enterprise Facility Reception (1999)
- 1-25 Nov. 29, 1999 Speaking Notes for Hong Kong Canada Business Association Luncheon (1999)
- 1-26 Nov. 30, 1999 Speaking Notes for UBC Alumni Faculty and Friends Reception (1999)
- 1-27 Dec. 1, 1999 Speaking Notes for President's Circle Dinner (1999)
- 1-28 Dec. 7, 1999 Speaking Notes for Don Rix Recognition Dinner (1999)
- 1-29 June 13, 2000 President's Circle Dinner (2000)
- 1-30 May 11, 2000 Chancellor's Circle Dinner (2000)
- 1-31 Oct. 1, 2000 Alumni Day (2000)

- 1-32 Oct. 6, 2001 Eulogy for Dr. Cheung-Kok Choi (2001)
- 1-33 Nov. 21, 2000 Speaking Notes for Toronto Alumni and Friends Breakfast (2000)
- 1-34 April 17, 2001 Speaking Notes for CN AGM Dinner (2001)
- 1-35 May 2 - June 25 2001 (2001)
- 1-36 Sept. 4 - 17 2002 (2002)
- 1-37 Sept. 21, 2001 UBC Heritage Circle Tea (2001)
- 1-38 Sept. 21, 2001 UBC Victoria Alumni Reception (2001)
- 1-39 Sept. 28, 2001 UBC Annual General Meeting (2001)
- 1-40 Sept. 28, 2001 UBC Alumni Achievement Dinner (2001)
- 1-41 Sept. 29, 2001 Major Entrance Scholarship Reception (2001)
- 1-42 Sept. 29, 2001 UBC Alumni Reunion Weekend Kick-Off (2001)
- 1-43 Oct. 1, 2001 UBC Heritage Circle Tea (2001)
- 1-44 Oct. 9, 2001 President's Circle Reception (2001)
- 1-45 Oct. 11, 2001 BC Theatre Conference Reception (2001)
- 1-46 Oct. 15 - Nov. 4 2002 (2002)
- 1-47 Dec. 1, 2002 B'nai Brith Hillel Foundation Gala (2002)

## ORGANIZATIONAL PLANNING, DEVELOPMENT, AND OPERATIONS

### Box 2

#### Institutions

- 2-1 UBC Organization Chart (1998)
- 2-2 UBC Board of Governors [1999]
- 2-3 Towards An Academic Plan [1999-2000]

#### External Affairs Division

- 2-4 External Affairs - Org Chart, Job Descriptions & Resumes (n.d)
- 2-5 External Affairs - Budget (1997-1999)
- 2-6 External Affairs - Policy Manual (1999)

#### Development Office

- 2-7 UBC Development Office 5-Year Planning Outline (n.d.)
- 2-8 Development Office - Org Chart, Job Descriptions, Salaries & Resumes (1995-1999)

- 2-9 Development Office - Fundraising History (1993-1998)
- 2-10 Development Office - Staff Performance Review Forms (n.d.)
- 2-11 Development Office - UBC Policy for Fundraising Charitable Appeal on Campus (1998-1999)
- 2-12 Development Office Protocols (1999)
- 2-13 1999/2000 Case Development (1998-1999)
- 2-14 Samples of Faculty Case Statement (n.d.)
- 2-15 Faculties' Publications Pertaining to Development (1997-1998)
- 2-16 World of Opportunity Campaign [1998]
- 2-17 Case Statement (1994-1995)
- 2-18 Strategy (1997-1999)
- 2-19 Workplans 1994/95 (1995)
- 2-20 Workplans 1995/96 (1996)
- 2-21 Workplans 1996/97 (1997)
- 2-22 1997/98 Workplan (1998)

Box 3

- 3-1 Detailed Work Plan 1998/1999 (1999)
- 3-2 Detailed Work Plan 1999/2000 (2000)
- 3-3 Wesbrook Council
- 3-4 Think About Us! - April 27, 2001 (2001)

CORRESPONDENCE

Box 4

Peter W. Ufford and David Strangway Documents

- 4-1 [June 1988-Dec. 1989] (1988-1989)
- 4-2 [Jan.-Aug. 1990] (1990)
- 4-3 [Sept.-Dec. 1990] (1990)
- 4-4 [Jan.-Sept. 1991] (1991)
- 4-5 [Oct. 1991-March 1993] (1991-1993)
- 4-6 [April 1993-May 1996] (1993-1996)

Outgoing

- 4-7 [Dec. 2002-Jan. 2003] (2002-2003)

4-8 [Feb.-March 2003] (2003)

Box 5

5-1 [April 2003] (2003)

5-2 [May 2003] (2003)

5-3 [July 2003] (2003)

5-4 [Aug.-Nov. 2003] (2003)

5-5 [Dec. 2003] (2003)

LEADERSHIP UNIT

Box 6

Initiatives, Campaigns, and Events

6-1 April 11/91 Event - Video (1991)

6-2 April 11 - General Correspondence, Event Proposal, and News Release (1991)

6-3 April 11 - Mailing Lists and Invitation (1991)

6-4 April 11/91 Speeches (1991)

6-5 April 11 - Workplans (1991-1992)

6-6 [Correspondence] (1993)

6-7 Briefing Notes (1999)

6-8 [Design Proposal - UBC Institute of Asian Research] (n.d.)

6-9 [Design Proposal - Green College] (1992)

6-10 [Design Proposal - UBC Central Library] (1993)

6-11 [Design Proposal - School of Social Work] (n.d.)

6-12 Faculty Fundraising (1997-1999)

6-13 Hong Kong - Correspondence (1991)

6-14 Hong Kong - Jan. 91 - Advance Preparations and Budgets (1990-1991)

6-15 Hong Kong - Jan. 91 - Address Lists, Invitation Lists, Program Details and Video (1990-1991)

6-16 Hong Kong Lunch and Dinner Jan. 1991 (1989-1991)

6-17 Hong Kong Festival - June 1991 (1991)

6-18 Hong Kong Festival 1992 (1992)

Box 7

7-1 Japan Event (1991-1992)

- 7-2 Kick-Off Budget (1988-1989)
- 7-3 Leadership Gifts and President's Circle (1999)
- 7-4 Lin Centre for International Studies (n.d.)
- 7-5 [Nitobe Misc.] (1970-1994)
- 7-6 Nitobe Garden Proposal (1990)
- 7-7 1 Nitobe Garden - Renovation Planning (1987-1991)
- 7-8 2 Nitobe Garden Project (1991-1992)
- 7-9 3 Nitobe Garden Project (1992)
- 7-10 4 Nitobe Garden Renovation (1992)
- 7-11 Premier's Dinner - May 2/88 (1988)
- 7-12 Slide Shows (1987)
- 7-13 Tzu Chi Foundation (2000)
- 7-14 UBC Fund (1997-1999)
- 7-15 Vancouver Launch (1989)
- 7-16 Wesbrook Dinner (1987)

## Box 8

### Data Base

- 8-1 [Data Base Outline and Planning] (1999)
- 8-2 UBC Fund On-Site Final Report - Oct. 30, 1998 (1997-1998)
- 8-3 Major Gifts On-Site - June 2-6, 1997 (1997)
- 8-4 Faculty Fund-Raising On-Site - March 25-29, 1996 (1996)
- 8-5 Faculty Fund-Raising On-Site Follow-Up - Dec. 4-5, 1996 (1996)
- 8-6 Key Correspondences (1998-1999)
- 8-7 Prospect Management Handbook (1999)
- 8-8 On-Site Report - July 4-8, 1994 (1994)
- 8-9 On-Site Report - Feb. 3-8, 1994 (1994)
- 8-10 On-Site Report - May 14-18, 1990 (1990)
- 8-11 On-Site Analysis Report - Dec. 18, 1987 (1987)
- 8-12 Alumni Survey Study 1998 (1998)
- 8-13 Major Campaign Internal Audit - Feb. 1995 (1995)
- 8-14 Monitoring Reports - UBC Fund (1997-1999)
- 8-15 Monitoring Reports - 98/99 Budget Expenditure Statement (1999)
- 8-16 Monitoring Reports - 97/98 Budget Expenditure Statement (1998)
- 8-17 Monitoring Reports - Funds raised as of Jan. 31, 1999 (1999)
- 8-18 Monitoring Reports - 1998/04/01 - 1999/01/31 (1999)
- 8-19 Monitoring Reports - 1993/04/01 - 1998/03/31 (1998)
- 8-20 [Kent Dove Report - Dec. 1991] (1991)

- 8-21 [Kent Dove Report - May 2, 1988] (1988)
- 8-22 [Kent Dove Report - Nov. 1985] (1985)

Box 9

Subject Files

- 9-1 1998 Application of Funds Raised by Development Office (1996-1999)
- 9-2 ABC Reports 1997 (1997)
- 9-3 Academic Plan - UBC (1998-1999)
- 9-4 Alumni Association (1999)
- 9-5 Awards Services Protocols (n.d.)
- 9-6 Campaign Operations (1990-1993)
- 9-7 Campus (1989-1995)
- 9-8 Centre for Islamic Studies (1990-1994)
- 9-9 Chan Centre 1997 (1997-1998)
- 9-10 Chan Centre Opening (1997)
- 9-11 Commerce Articles and Prospects (1991-1992)
- 9-12 Corporate Foundations (1991)
- 9-13 Endowment Info (1990-1992)
- 9-14 [Faculty Fundraising] (1991-1994)
- 9-15 First Nations (1998-1999)
- 9-16 Flex Time (1998)
- 9-17 Foundation Advisory (1991)
- 9-18 Foundation Clearance (1991)
- 9-19 Foundation Giving Histories (1990-1992)
- 9-20 Foundation Prospects (1991-1992)
- 9-21 Foundation Strategy (1991-1992)
- 9-22 Gairdner Foundation (1999)
- 9-23 Governance Study - UBC (1998)
- 9-24 Graduate Studies (1999)
- 9-25 Islamic Fundraising Strategies (1990-1992)
- 9-26 Islamic Studies Prospect Research (1987-1992)

Box 10

- 10-1 Handoff: 1999 - A. Donahue (1998-1999)
- 10-2 High Tech (1998)
- 10-3 Honorary Degrees (2000)
- 10-4 Information and Privacy Rights (n.d.)

- 10-5 Land and Building Services (1999)
- 10-6 Leadership Unit and President's Circle (1999)
- 10-7 Leon and Thea Koerner University Centre (n.d.)
- 10-8 Manager's Office Account Activity Report (1998-1999)
- 10-9 Martha Piper (1997-1999)
- 10-10 Matching Funds (1997-2000)
- 10-11 MOA Golden Gala (1999)
- 10-12 Museum of Anthropology (1999)
- 10-13 Official Community Plan (2000)
- 10-14 On-Line Education (2000)
- 10-15 Pharmaceutical Industry (2000)
- 10-16 Physical Planning - UBC (n.d.)
- 10-17 Portfolio Management Foundation (1999)
- 10-18 PMC Account Assignment: Discrepancies (n.d.)
- 10-19 President's Circle (1993-1995)
- 10-20 President's Circle Analysis (1994)
- 10-21 President's Community Advisory Committee (1998)
- 10-22 President's Office (1993-1995)
- 10-23 Prospect Co-ord. - 1998 (1996-1997)
- 10-24 Prospect Coordination Committee (1995-1996)
- 10-25 Training Articles (1989-1990)
- 10-26 UILO (n.d.)
- 10-27 UBC - Investment Policy (1999)
- 10-28 Workplan 1996/1997 (1996-1997)

## PHOTOGRAPHS

### Box 11

- 11-1 [Donor Recognition of Hewlett Packard Photos] (n.d.)
- 11-2 [Liu Site Dedication Photos] (n.d.)
- 11-3 [St. John's College Photos] (1993)
- 11-4 [Tsing Tao Cornerstone Ceremony Photos] (1997)

## AUDIO VISUAL

Tape #    Tape Title

VT 1621    UBC Okanagan Barber School of Arts and Sciences Announcement -  
Webcast - 50 minutes (n.d.)  
CHBC Television News coverage - 2 minutes (n.d.)

VT 1622    RE: UBC Donation -  
CBUFT-TV Le Telejournal C-B - 18:04 minutes [2005]  
CBUT-TV CBC Canada Now - 18:35 minutes [2005]

VT 1623    CBHC Television News [2004]

VT 1624    Webcast UBC Okanagan - 48 minutes [2004]

VT 1625    Webcast UBC Okanagan - 48 minutes [2004]

VT 1626    [Barber UBCO Event] (n.d.)

VT 1627    UBC Okanagan Tape 1 (n.d.)

VT 1628    UBC Okanagan Tape 2 (n.d.)

AT 3373    Re: UBC Donation -  
CBU-AM, CBC News - 17:35 PT - 1:30 minutes [2005]  
CKWX-AM News - 08:08 PT - 20 seconds [2005]  
CBU-AM, CBC Early Edition - 08:16 PT - 7 minutes [2005]  
CKBD-AM Rafe Mair - 09:05 PT - 6 minutes [2005]