
Rotman

**Fueling
Purpose
into Action**

Case for Support



Rotman School of Management
UNIVERSITY OF TORONTO

DEFY
GRAVITY



The Rotman School of Management

The Rotman School is a place where current and future leaders deepen their understanding of the world and their ability to shape it. At the centre of a diverse community of learning and inquiry, Rotman also lies at the heart of Canada's business community. A deep sense of purpose underlies everything we do—we know who we are and what we want to achieve. And equally important, we know why.

We create value for business and society through our thought leadership and transformational education. Our faculty members explore ways to drive innovation and analytical insight and advise on ways to design resiliency into organizations. With growing needs for business to respond to pressing calls to action, our focus has turned to building more sustainable societies—the key to long-term prosperity. Woven throughout these efforts

is a profound commitment to developing global excellence and leaders with an international and long-term perspective.

Built on a proud tradition of support from the community, Rotman is considered one of the world's most innovative business schools and consistently ranked among the world's top 20 schools for management research in the Financial Times Global MBA ranking.

Now, we are embarking on an ambitious campaign to aim even higher and support our highest priorities. We invite the Rotman community to join us in this effort, which will be an integral part of Defy Gravity: The Campaign for the University of Toronto. Together, we will deepen our impact and power the goals, priorities, and specific initiatives that will put our purpose into action.



Defy Gravity: The Campaign for the University of Toronto

The largest university campaign in Canadian history seeks to raise \$4 billion and engage 225,000 alumni. To reach these ambitious targets, we will harness the power of our worldwide community, including 640,000 alumni, 95,000 students, and 23,000 faculty and staff, for the betterment of humanity.

From pioneering work in the humanities to the breakthrough development of neural networks, the University of Toronto has a long history of tackling the impossible and transforming society through the ingenuity of its faculty, students, and alumni.

In a world searching for positive change, we will build on this tradition to address some of the biggest challenges facing our city, country, and planet as we recover from the COVID-19 pandemic and grapple with this age of climate change, inequality, and mass technological disruption.

Through our commitment to inclusive excellence, we will bring together top minds from every conceivable background and discipline to lead pandemic recovery and enable healthy lives, build inclusive cities and societies, create a sustainable future, spark creativity and culture, drive scientific discovery, power bold innovation and entrepreneurship, and support student success as we educate the next generation of creative, engaged, and empathic citizens.

The campaign theme, Defy Gravity, reflects U of T's history of advancing the frontiers of knowledge by transcending disciplines and borders in a diverse and inclusive community that emboldens students to think big—a community that accomplishes things no one else believed possible.



Message from the Dean

Our bold fundraising campaign is set against a backdrop of unprecedented change—a devastating pandemic, the accelerating effects of climate change, the growing uncertainties of geopolitical conflict, and the turmoil stemming from unresolved and long-standing social injustices. At the same time, technology continues to transform how we connect and collaborate, tempered by rising concerns over the security and trustworthiness of information.

Now more than ever, we need creative solutions for an ever-changing future, with the Rotman School of Management playing a critical role in developing business leaders who can tackle these challenges. Thanks to visionary supporters like you, Rotman has already made incredible strides to increase our global impact, but we are setting our sights even higher.

Rotman’s academic plan, *Purpose into Action (2022-2027)*, describes how philanthropy can propel key differentiating initiatives that will dramatically grow our impact. Our fundraising priorities are grounded in a strong sense of purpose and are tied closely to Rotman’s four strategic goals: advancing the frontiers of management thinking, delivering transformational management education, taking insight to impact, and creating a more diverse and welcoming community.

I hope you will join us in realizing the potential of these exciting new initiatives.



Susan Christoffersen

Dean, Rotman School of Management
William A. Downe BMO Chair in Finance

Our purpose. Our campaign.

Together with the entire University of Toronto community, we are inspired to tackle the impossible and transform society.

As part of U of T's Defy Gravity campaign, Rotman is setting a bold and ambitious goal of raising \$250 million to shape the next generation of business innovators and the organizations they will lead. Our exciting campaign will usher in a new era for the Rotman School by dramatically enhancing

existing strengths and powering new capabilities and ideas. We seek philanthropic support to expand the impact of our core teaching and research activities with renewed investment in the spaces needed to deliver world-class programs.

Our purpose fueled by philanthropy

Our new strategic plan, *Purpose into Action: Academic Plan 2022-2027*, provides the overarching framework for our fundraising priorities. It explains how philanthropy can help fuel our aspirational goals to advance the frontiers of management thinking, deliver transformational management education, take insight to impact, and create a more diverse and welcoming community.

Underpinning these goals is our profound sense of purpose – **to create value for business and society**. Rotman plays a pivotal role in helping to influence and educate current and future business leaders to address urgent global challenges and create long-term prosperity.

Based on our deep knowledge and areas of expertise, we have further defined our purpose as it relates to three broad themes where we add value.

- **Designing more responsive and resilient organizations**
- **Driving innovation and analytical insights**
- **Building healthy, equitable and sustainable societies**

We therefore frame our campaign priorities to support our overarching strategic goals and to deliver on the themes that define our purpose. Across these initiatives, your support will help us retain and attract world-class scholars, create learning opportunities for students, and share our discoveries with the community.

\$250m

Rotman is setting its sights even higher with an ambitious new fundraising goal of \$250 million as part of U of T's Defy Gravity campaign. Through investments in cross-cutting research and teaching initiatives, we aim to develop responsible and purposeful business leaders with comprehensive support for faculty, research, teaching, and learning.

Our campaign by the numbers

\$125m

Teaching & experiential learning

Developing the best and brightest students at Rotman through life-changing scholarships, curriculum innovation, and hands-on learning opportunities to build self awareness and strong interpersonal skills that are critical for all business leaders.

\$45m

Inspiring spaces

Building new homes for Rotman Commerce and Rotman Executive Education that feature state-of-the-art construction, sustainable design, welcoming public areas to host events and engage with the community, and innovative classrooms that support interactive and collaborative learning.

\$40m

Academic leadership

Retaining and attracting outstanding scholars through significant investments in chairs, professorships, and fellowships. With technical skills needed in the area of data analytics, innovation, entrepreneurship, sustainability, real estate, machine learning, and blockchain, additional investments need to be made to provide funding for experts with these specialized skills to supplement our core strengths.

\$40m

Groundbreaking research

Advancing the frontiers of management thinking through our cutting-edge research centres, institutes, and labs. These centres propel deeper learning through cross-disciplinary research on society's most pressing issues. They educate students, business leaders and policymakers through research studies analyzing real business challenges, practical case development and training, and a multitude of events, speaker series, forums and conferences that engage the community and amplify impact.

\$25,000,000+

Marcel Desautels
Sandra and Joseph Rotman

\$10,000,000 - \$24,999,999

Michael Lee-Chin and Family
Anonymous (2)

\$1,000,000 - \$9,999,999

BMO Financial Group
Mark S. Bonham
Anson Chan
CIBC
CIT Financial Ltd.
CN
Comcast Corporation
Sydney Cooper and Family
Corus Entertainment Inc.
Chartered Professional Accountants of Ontario
(CPA Ontario)
Richard J. Currie

KEY
Margaret and Jim Fleck
Douglas and Ruth Grant
Donald A. Guloien and Irene Boychuk
Daisy Chiu-Fung Ho
The Joe Weider Foundation
The John and Deborah Harris Family
Foundation
KPMG LLP
Lee and Margaret Lau
Manulife
Maple Financial Group Inc.
Martin Ossip Family at the Jewish Foundation of
Greater Toronto
Ludy Mitchelson
of Economic Development and

\$500,000 - \$999,999

Canadian Pacific
The Max B. E. Clarkson Family
Deloitte
William Downe
Anthony and Shari Fell
John Francis
Global Risk Institute in Financial Services
Edward J. Kernaghan
Sonia and Arthur Labatt
Mastercard Worldwide
MDS Inc.
Microsoft Canada Co.
National Bank of Canada
National Bank Financial
Power Corporation of Canada
Royal Trust Corporation of Canada
William and Phyllis Waters
Anonymous

\$250,000 - \$499,999

John Collins
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\$100,000 - \$249,999

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Fueling purpose into action

Our five-year plan maps out the specific steps by which we'll work to fulfil our purpose as a leading business school committed to teaching, learning, research, and community engagement.

Many of the best and brightest students from around the world come to Rotman in pursuit of transformational management education – the kind that equips them to take insight to impact and become the leaders our society needs. Attracted by world-class faculty members, inspiring spaces, a diverse student body and global alumni network, our exceptional students launch careers or move in exciting new professional directions at established companies, innovative start-ups, not-for-profits, and the public sector.

We will maintain Rotman's place among the global leaders in management thinking by investing in bold new thinking and fostering research excellence within a vibrant and inclusive community of inquiry. We will deepen our commitment to students with marquee new facilities for our renowned executive programs and research labs as well as a dedicated home for our prestigious undergraduate program. Together with scholarships that enable Rotman to attract top students from diverse backgrounds, these investments will help usher in a new era for management education.

Globally renowned researchers

Chairs enable the Rotman School to attract and retain internationally recognized scholars and researchers. As influential leading thinkers in a particular field, chairholders are magnets for excellence who help establish and generate entire ecosystems of discovery and innovation around themselves. Attracting cutting-edge thinkers is particularly essential at Rotman, which is so active in investigating revolutionary forces such as artificial intelligence, machine learning, and data-driven analytics.

A model for sustainable building

Rotman is set to occupy the top five floors of one of the most exciting and innovative buildings ever planned for U of T—a 14-storey wood tower expected to become one of the tallest mass timber and concrete hybrid buildings in North America. The building is at the cutting-edge of sustainability with cross-laminated timber construction that provides improved energy performance, reduced greenhouse gas emissions, and enhanced fire resistance. As the new home for Rotman's renowned executive programs and research labs, the wood tower offers prominent naming opportunities at its high-profile location overlooking Bloor Street. These opportunities include a premium event space with sweeping views of the city as well as teaching and research floors, active learning classrooms, lounges, boardrooms, and executive study breakout rooms.



A showcase for undergraduate education

Rotman Commerce offers a rich undergraduate business education with a vast and diverse range of programming options made possible by our partnership with U of T's Faculty of Arts & Science. Recent innovations include a revamped curriculum, more flexible course selection, and specialized focus areas within the management stream. The most pressing need now is a new home to transform the Rotman Commerce student experience. With philanthropic support, this crucial expansion project will feature innovative classrooms with state-of-the-art technology and collaborative workplaces for students, faculty, staff and the broader community.

Life-changing scholarships for undergraduate and graduate students

Talented candidates come to Rotman from around the world for a transformational management education, enabling them to become the skilled, well-rounded leaders our society needs. For the most highly sought global candidates, scholarships play an important role in convincing them to choose Rotman over other top business schools. Scholarships are also critical for talented students with financial need who would otherwise struggle to afford the costs of our exceptionally high-quality programs. Your support will help us attract the best and brightest students to Rotman and target under-represented groups such as Indigenous and diverse international communities.





Designing more responsive and resilient organizations

To navigate relentless change, organizations must foster agility and creativity while building a foundation of trusted strength.

Rotman designs more responsive and resilient organizations through learning and research that incorporate key aspects of management, including leadership, governance, ethics, risk management, financial disclosure, behavioural economics and business design.

The Rotman School educates agile, well-rounded leaders who can navigate fast-changing landscapes, and drives key behavioural insights that organizations need to anticipate and respond to disruptive forces. The following initiatives fulfil these goals and are most in need of your support.



Nurturing well-rounded, connected leaders

The Rotman School's model-based approach to problem solving is complemented by experiential learning focused on specialized skills as well as personal development programs for aspiring leaders, innovators and entrepreneurs. These experiences give tomorrow's leaders the ability to navigate unfamiliar and fast-changing landscapes and to work with diverse teams.

The Self-Development Lab bridges a major gap in management education and is a key differentiator for the Rotman School. Today's organizations need leaders with strong professional and communication skills who can lead teams, effectively manage difficult conversations, and coach and persuade others. The Lab is built around intensive modules providing personalized feedback and proven pedagogy aimed at nurturing self-awareness

and interpersonal skills, enlisting experts from diverse backgrounds in psychology, the arts, and consulting.

Experiential learning is a powerful aspect of our undergraduate, MBA and fast-growing master's programs in Finance, Financial Risk Management and Management Analytics. These opportunities enable students to work with diverse organizations ranging from not-for-profits to local businesses to multinational enterprises, on projects designed to strengthen strategic skills. Participants have tackled everything from a global human rights campaign to the development of autonomous vehicles for the logistics industry. Funding opportunities include mentorship, international experiences, flexible internships, global consulting projects, and industry-led projects.



Behavioural Economics in Action at Rotman (BEAR)

Responsive and resilient organizations need a deeper understanding of how people really behave to design better products, services and programs. At BEAR, businesses and policymakers work directly with researchers to apply behaviourally informed programs and tools to drive insights, strategies, and clearer understanding of clients, employees and other stakeholders. The centre's findings have impacted everything from organ donor registration rates in Ontario to helping advisors and financial planners at TD Wealth support their clients.



Driving innovation and analytical insights

The Rotman School develops creative solutions to business problems by enabling innovation and applying new tools in data analytics, machine learning and blockchain to address larger social, economic and environmental challenges.

This role is even more pressing in a fast-changing, data-powered world where information has become the most valuable form of currency. The School is committed to fostering excellence in innovation and entrepreneurship, which drives teaching and research in cutting-edge areas such as artificial intelligence and simulation-based financial analysis.

Building our capacity to support innovation and analytical insights requires expansion of our core research capacity and investments in our renowned experiential labs that ignite entrepreneurship and connect Rotman in real time to the global flood of financial information, big data and machine learning capabilities. Your support for these priority initiatives is key to these efforts, with detailed information available upon request.



Creative Destruction Lab (CDL)

Canada excels at producing research breakthroughs but falls short in commercializing them. Launched in 2012 at the Rotman School, the CDL has been wildly successful in reversing this dynamic. At the Lab, massively scalable, seed-stage, science- and technology-based companies must meet rigorous objectives, with support from venture founders, seasoned entrepreneurs, scientists, economists, and others. This model also offers Rotman's MBA students hands-on entrepreneurial experience and priceless mentorship. As of 2022, CDL ventures had generated \$18 billion in equity, with the CDL model extended to 12 business schools worldwide. Fundamental to its vision, the CDL is funded by philanthropy rather than taking a fee or equity share from ventures.



A nexus for global information, data and analytics

It is all too easy for businesses and organizations to fall behind given the fast-changing information technology, big data, AI and novel approaches in analytics that are all transforming business and the skills required to navigate this evolving landscape. Through its labs, the Rotman School provides access to real-time global information and cutting-edge analytic tools, generating insights to help organizations adapt and prepare for the future. They also offer support and provide tremendous advantages for our MBA and master's programs in Finance, Financial Risk Management and Management Analytics. The following dynamic Rotman labs require investments to drive digital innovation in Canada's financial services industry and to educate business leaders more broadly with data analytic skills.

At the **Financial Innovation Lab (FinHub)**, researchers apply machine learning and AI algorithms to solve complex problems in the financial industry, ranging from portfolio optimization to dynamic hedging strategies to volatility modelling. Blockchain technologies and digital currencies are another area of financial innovation being researched at FinHub with many real world applications for central banking, open banking, and regulatory oversight.

Big data is revolutionizing research methods, offering solutions to ever-more complex business challenges.

The TD Management Data and Analytics Lab

is a one-of-a-kind interface that facilitates the management of big data, empowering users to better extract information from data, apply new AI algorithms and derive insights using a wide range of programming languages and new analytic tools.



Building healthy, equitable and sustainable societies

The role for business is changing in society. There are now greater expectations for corporations to work alongside governments, NGOs and other organizations to address pressing environmental, social and governance issues.

The Rotman School integrates these key issues into our programs, including approaches to mitigating environmental impact; advancing equity, diversity and inclusion within organizations and communities; using behaviourally informed nudges to advance policy objectives; and expanding access to high-quality housing, health care, and other social infrastructure.

To advance Rotman's leadership in building healthy, equitable and sustainable societies, we are pleased to highlight three centres that are shaping the conversation on corporate sustainability, the dynamics of gender in the economy, and growing challenges in health care.



The Michael Lee-Chin Family Institute for Corporate Citizenship

Worsening social and economic inequality and the accelerating effects of climate change are destabilizing societies and entire regions. If we want stable, inclusive and lasting prosperity, the long-term perspective is more vital than ever. Since its launch in 2004, the Lee-Chin Institute has been a trailblazer in helping government and business leaders address these issues with more sustainable corporate models. The Lee-Chin Institute's initiatives include influential research that promotes long-term prosperity, curriculum innovation that infuses sustainability into business strategy and practices, and speaker events that bring together academics, business leaders and policymakers to discuss new paradigms for a sustainable future.

Institute for Gender and the Economy (GATE)

Gender inequality continues to hold back our economy and degrade quality of life for millions of people. These negative impacts span everything from women of colour clustered in low paying essential services to job expectations for men that dissuade them from being more active caregivers. GATE is uncovering myth-busting insights about gender and its intersection with other identities through rigorous academic research; training of current and future leaders; engagement of business, civic and public sector leaders; and creation of practical tools and solutions. The Institute has partnered with several of Canada's largest companies, as well as government and non-profit organizations, to help guide policy and practice and to educate decision-makers.



The Sandra Rotman Centre for Health Sector Strategy

The COVID-19 crisis and its ongoing impacts have highlighted debilitating weak spots in our health care system. One key takeaway is that too many health leaders lack specialized management training while conversely, management experts often fail to grasp the distinct challenges of health care. This gap impedes everything from sourcing of hospital beds to intensive-care unit transfer. The Sandra Rotman Centre addresses these issues by generating insights for governments, organizations and other key stakeholders facing complex health care challenges. This research, education and policy centre is ideally situated within Canada's leading management school and closely tied to U of T's renowned Temerty Faculty of Medicine.



Additional transformational initiatives

The world of business management is immense, ever-changing, and diverse. So, too, is the vast platform of learning, research, and public engagement activities at the Rotman School of Management. We would be pleased to discuss any of our other transformational initiatives.

- BMO Financial Group Finance Research and Trading Lab
- Business Design Initiative
- Capital Markets Institute
- Centre for Professional Skills in Rotman Commerce
- Centre for Real Estate
- CPA Centre for Accounting Innovation Research
- David and Sharon Johnston Centre for Corporate Governance Innovation
- Desautels Centre for Integrative Thinking
- Initiative for Women in Business
- Institute for International Business
- Intercultural Skills Lab
- Rotman Insights Hub
- Rotman LEADS mentorship program (Leadership, Exploration, Advice, Development, and Success)



THEOLOGICAL MISSIONS



Imagining a better future

Action grounded in purpose opens up bold new possibilities. Imagine a better future that we can shape by building upon the unique strengths and advantages of the Rotman School.

Imagine brilliant students launching bold and innovative companies that address pressing challenges ranging from earlier detection of disease to combatting carbon emissions to improved global logistics.

Imagine cutting-edge researchers shaping global conversations that result in new policies and practices that elevate lives from remote communities to entire global regions.

Then imagine a school that can bring all the key elements together needed to make this possible. Brilliant young minds, top thinkers, driven

entrepreneurs, knowledgeable business leaders, and a vast influential global network—all connected within a dynamic environment that is plugged into the global flow of business information and that fosters collaboration and possibilities.

This is the unmistakable energy and promise you feel the moment you walk through the front doors of the diverse and welcoming Rotman School.

With your support for the Rotman School, we will achieve landmark advances in learning, research, and community engagement within a campaign that lives up to the highest ideals of the University of Toronto's Defy Gravity campaign and its message of hope and purpose:

Together, we can rise to any challenge.



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