

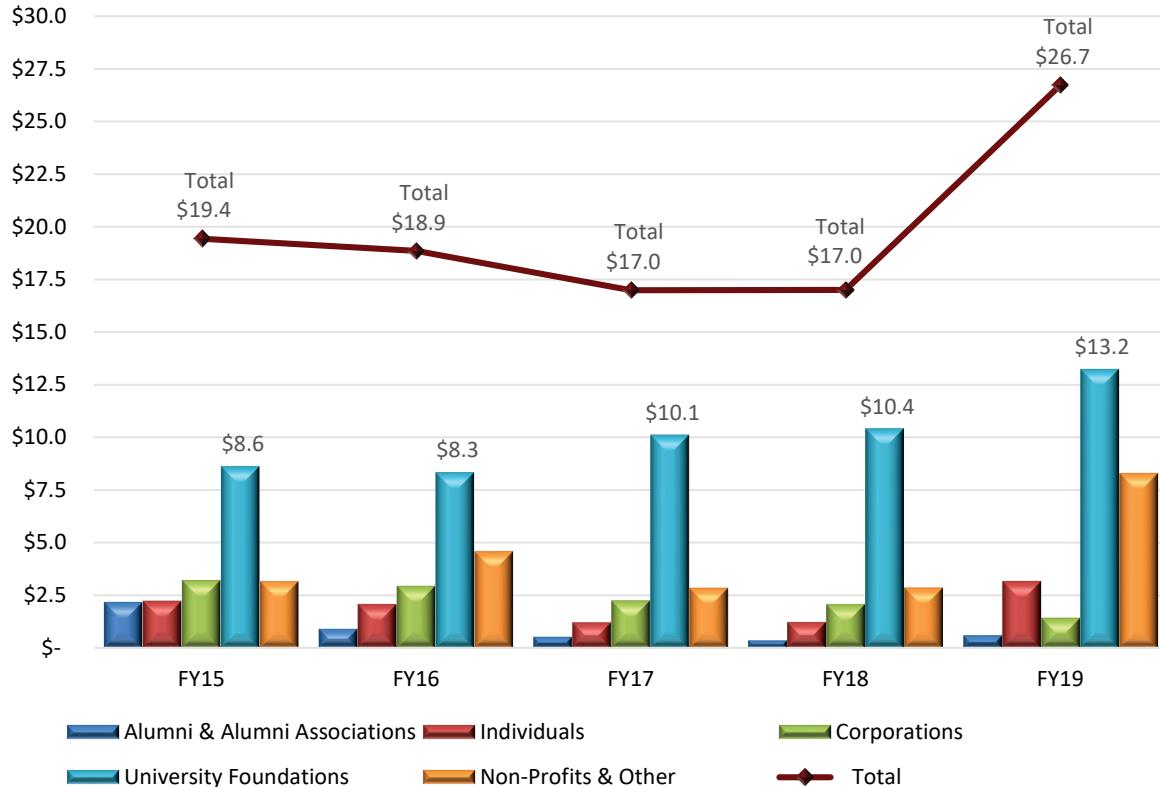


Annual Report on Gifts, Fundraising and Endowments

Year Ended June 30, 2019

UMS Gifts Received* by Donor Type

(\$ in millions)



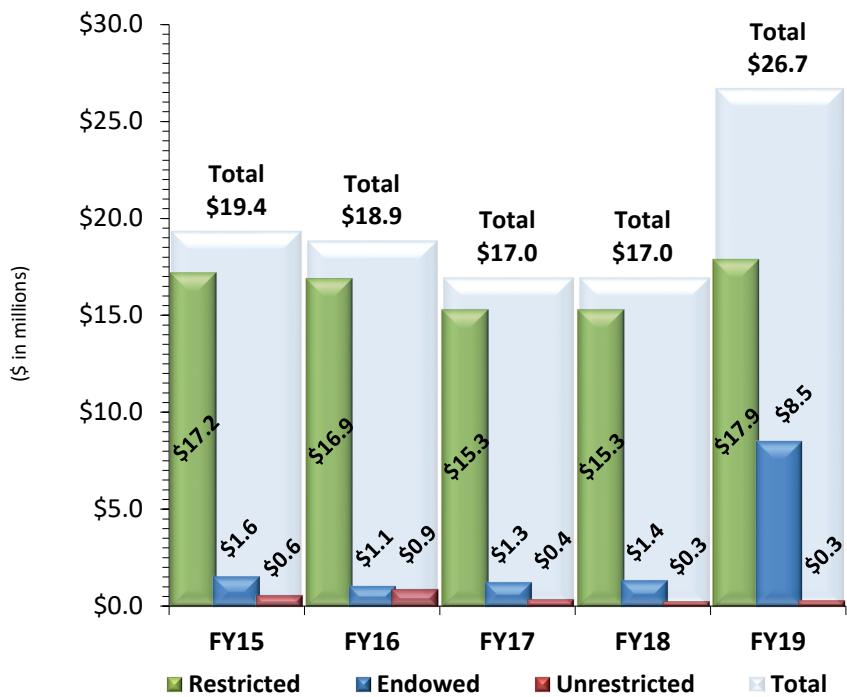
The UMS receives gifts through two methods:

1. Direct donations from alumni, individuals, corporations, and non-profits
2. Endowment distributions and non-endowed gifts from its affiliated fund raising organizations, the largest of which are the university foundations (see page 9 for FY18 and FY19 gifts that the affiliates received)

*UMS gifts reported herein include cash, checks and negotiable securities, and pledge payments. Gifts-in-kind and pledges receivable are not included in these totals.

UMS Gifts Received by Restriction Type

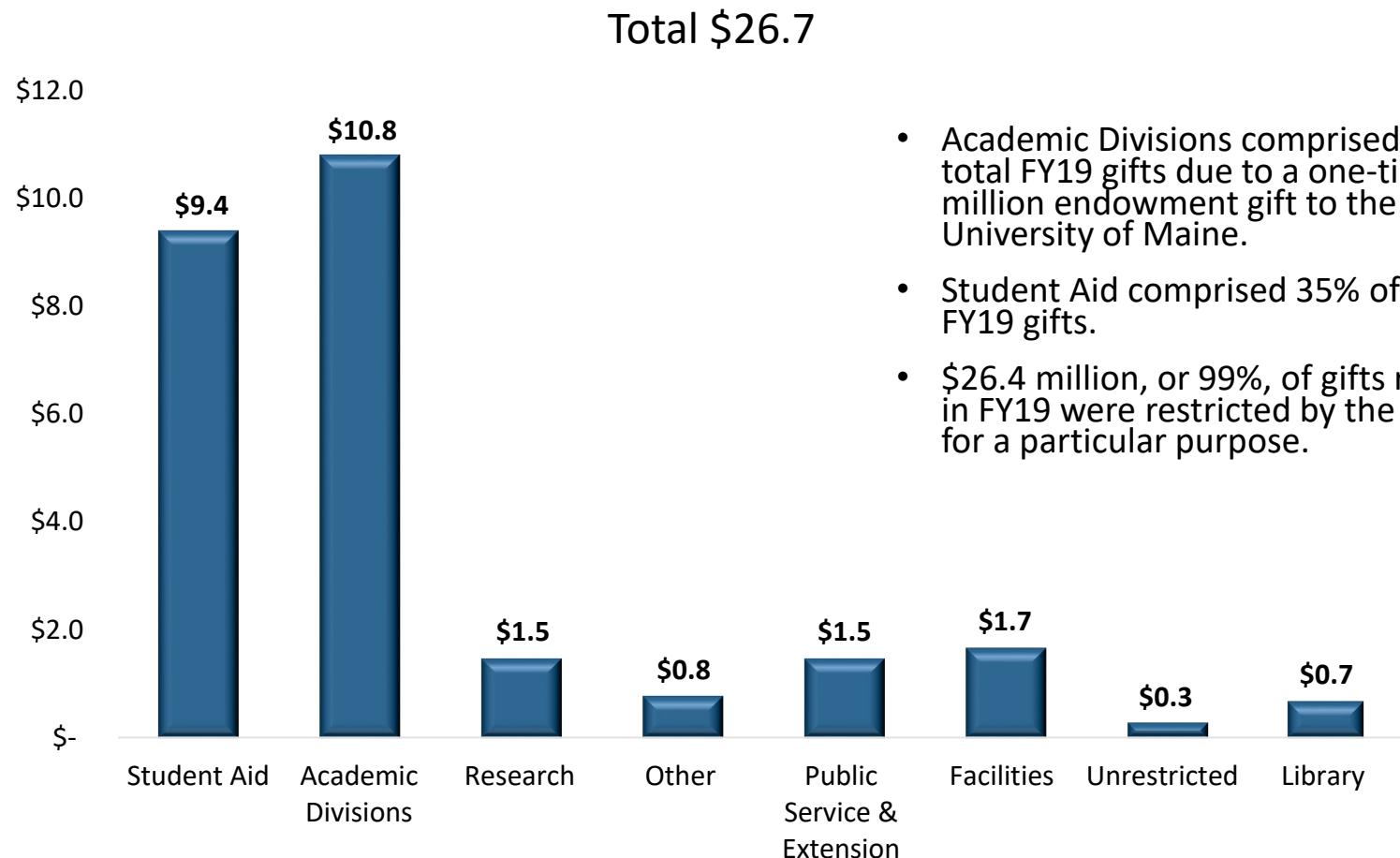
(\$ in millions)



Endowed gifts increased from FY18 to FY19 primarily due to a one-time \$5 million gift to the University of Maine.

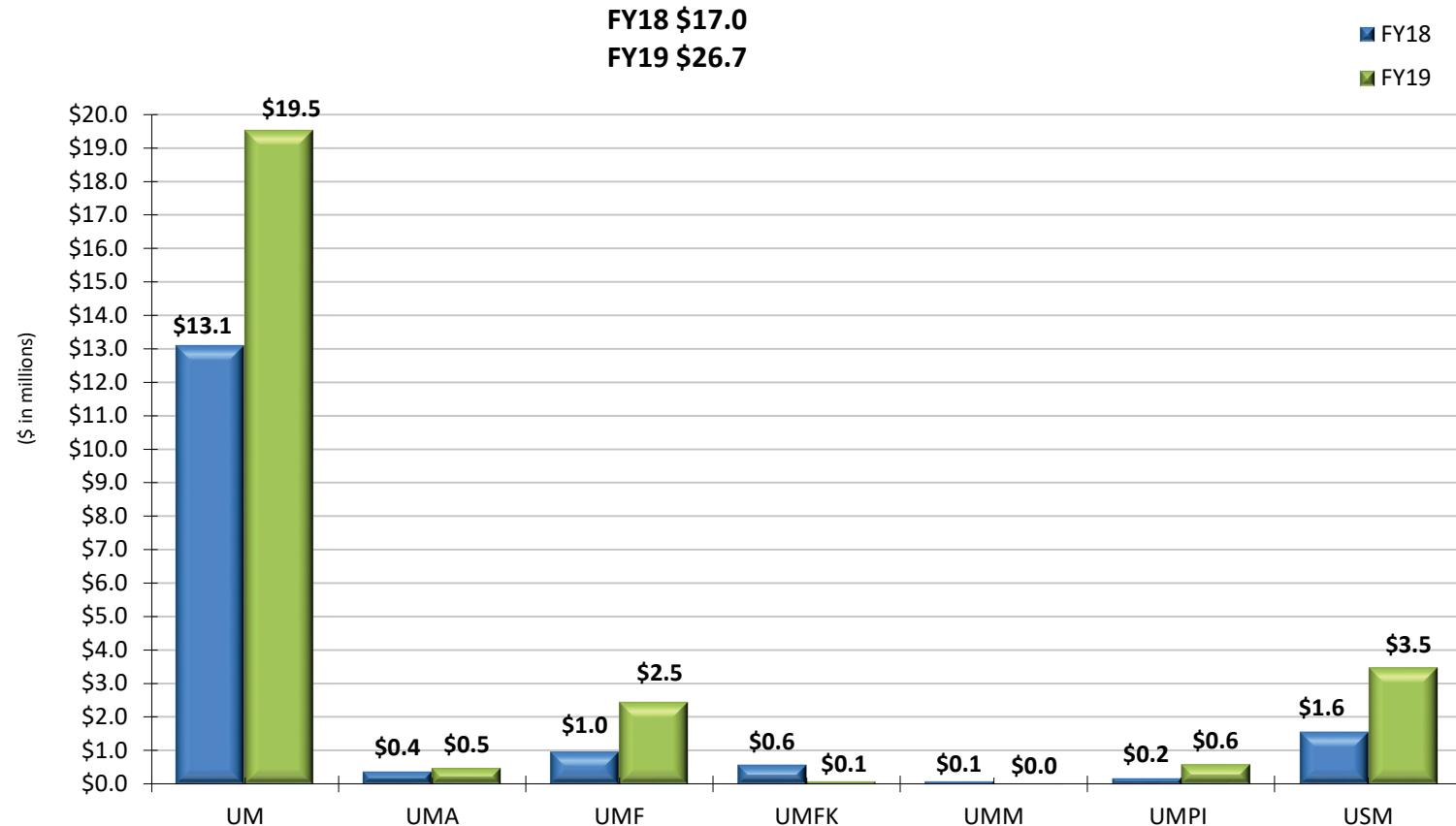
UMS FY19 Gifts Received by Purpose

(\$ in millions)



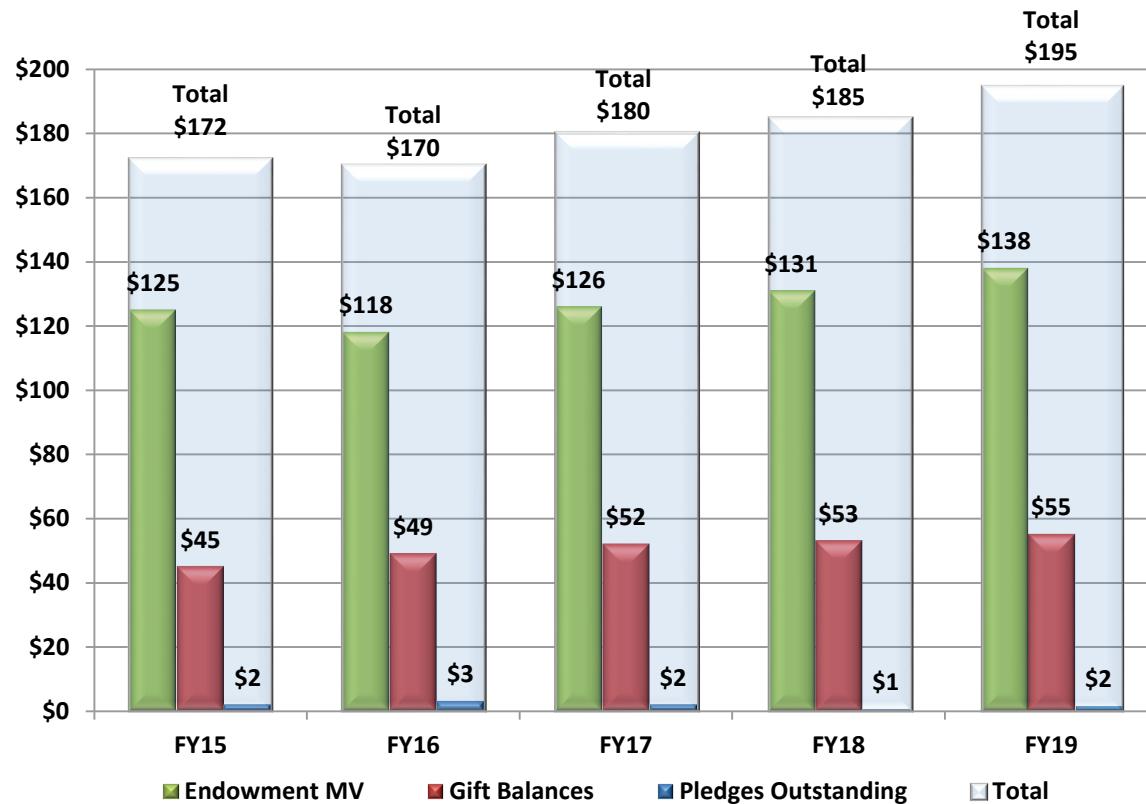
UMS Gifts Received by Campus

(\$ in millions)



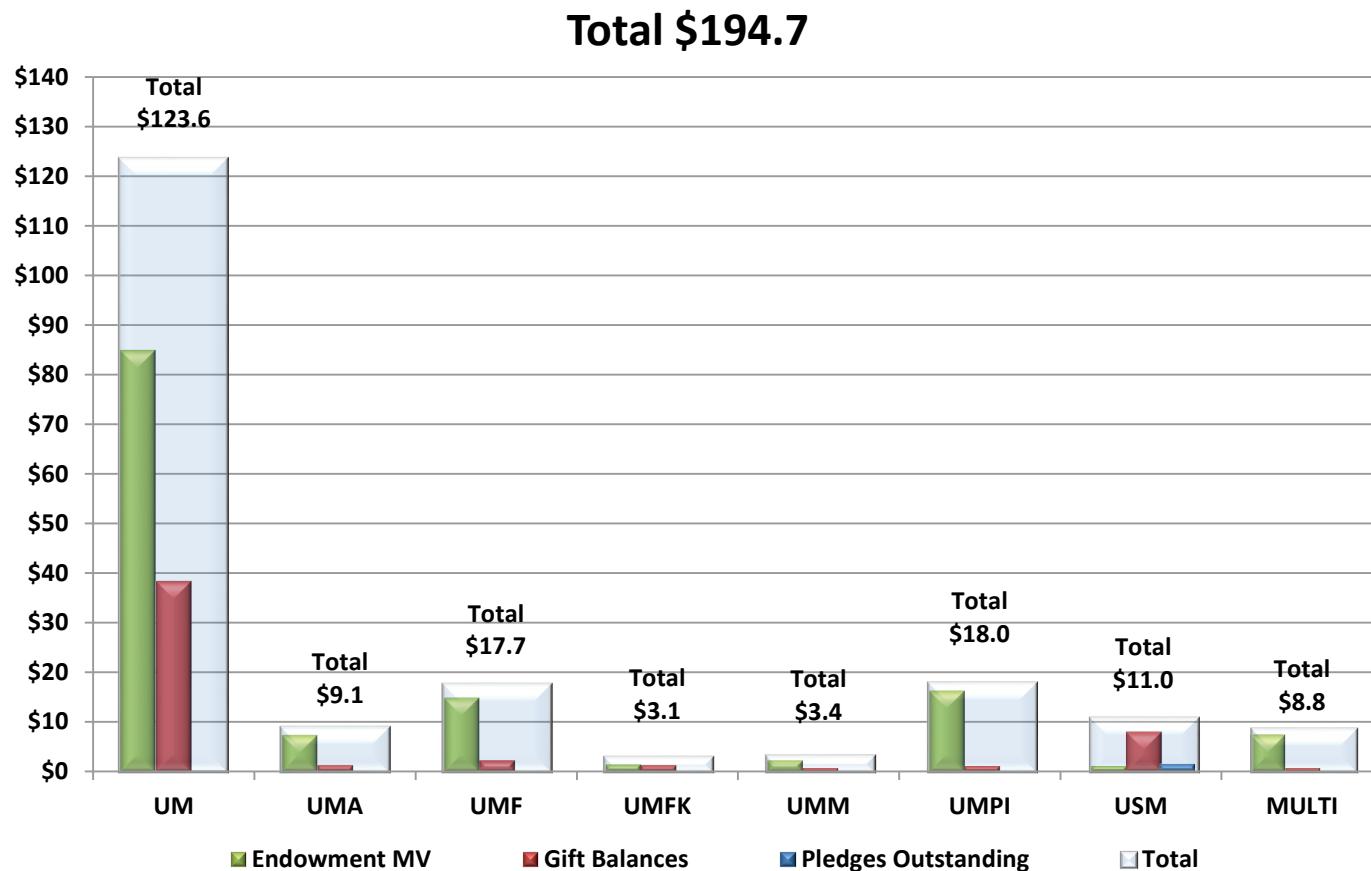
UMS Gift Balances as of June 30th

(\$ in millions)



UMS Gift Balances by Campus as of June 30, 2019

(\$ in millions)



UMS Affiliated Fund Raising Organizations

Gifts Received by UMS Affiliated Organizations

(\$ in thousands)

	<u>FY18</u>	<u>FY19</u>
UM Affiliates		
UM Alumni Association	\$ 209	\$ 207
UM Foundation	12,878	13,051
UM Pulp & Paper Foundation	419	736
4-H Camps at Tanglewood & Blueberry Cove	19	47
Maine 4-H Foundation	571	1,172
UMFK Affiliates		
UMFK Alumni Association	3	-
UMFK Foundation	165	147
John L. Martin Scholarship Fund	-	-
UMM Alumni Association	-	-
Foundation of the University at Presque Isle	1,143	204
USM Affiliates		
USM Foundation	2,982	4,344
UM Law School Foundation	782	1,098
Associates of the Osher Map Library	-	45
Total Gifts Received by Affiliated Organizations	\$ 19,171	\$ 21,051

60% of FY18 gifts and
48% of FY19 gifts
were from Alumni

29% of FY18 gifts and
16% of FY19 gifts
were from Alumni

Endowment Market Values for UMS Affiliated Organizations

(\$ in millions)

	<u>FY18</u>	<u>FY19</u>
<i>UM Affiliates</i>		
UM Foundation ^a	\$ 221.0	\$ 227.1
UM Pulp & Paper Foundation	18.5	17.5
4-H Camps at Tanglewood & Blueberry Cove	0.3	0.3
Maine 4-H Foundation	3.6	3.5
<i>UMFK Affiliates</i>		
UMFK Foundation ^b *	2.3	2.5
John L. Martin Scholarship Fund*	0.1	0.1
<i>Foundation of the University at Presque Isle</i>	6.1	6.2
<i>USM Affiliates</i>		
USM Foundation*	20.3	21.9
UM Law School Foundation*	4.6	4.5
Associates of the Osher Map Library	-	2.7
Total Endowment Market Value for Affiliated Organizations	\$276.8	\$ 286.3

^a UM Foundation totals include UM Alumni Association endowments.

^b UMFK Foundation totals include UMFK Alumni Association endowments.

* Endowment included in the UMS Managed Investment Pool.

Status of Capital Campaigns as of June 30, 2019

(\$ in millions)

Vision for Tomorrow Comprehensive Campaign (UM)

Includes gifts received by the University of Maine and its affiliated organizations, with the University of Maine Foundation leading the fundraising effort. The UMS Board of Trustees approved the campaign in May 2017 with public announcement by the campus in October 2017. Four priorities guide this campaign with students being at the heart of each — Fostering Student Success, Ensuring Access for All of Maine, Catalyzing Maine's Economy, and Accelerating Discovery to Impact. These priorities overlap so that a gift in support of one positively impacts the others and advances the mission of the University of Maine — teaching, research, and public service.

Start 7/1/11

End 6/30/20



Status of Capital Campaigns as of June 30, 2019 - continued

Next Generation Comprehensive Campaign (USM)

In May 2017, the UMS Board of Trustees approved the campaign, "USM: The Next Generation" to raise an anticipated \$80 million.

Since that time the landscape has changed in numerous ways, including:

- Successful passage of the statewide bond initiative
- An imminent name change
- Leadership changes at the USM Foundation and on the USM President's Cabinet

The USM Foundation has engaged fundraising counsel to lead a campaign design exercise, which will culminate in January 2020. The updated campaign plan will go before the USM Foundation Board and USM President's Cabinet for ratification.

Below is an update for the four fundraising priorities presented to the UMS Board of Trustees in May 2017:

1. The Center for the Arts, previously known as the Performing Arts Center, has been tabled pending the campaign design exercise.
2. Promise Scholars Program has a significantly reduced fundraising target based on data from the first two cohorts of scholarship recipients and is continuing to raise funds towards its modified goal of \$5.8 million in endowed scholarships and \$750,000 in spendable scholarships. Just over \$1.6 million was raised in FY19 for a total raised of \$4.78 million.
3. The Risk Management & Insurance Program chair campaign raised an additional \$150,000 in FY19 for a total raised of \$1.8 million. The goal remains \$3 million.
4. The athletics fundraising component is not active at this time.