



# Annual Report on Gifts, Fundraising and Endowments

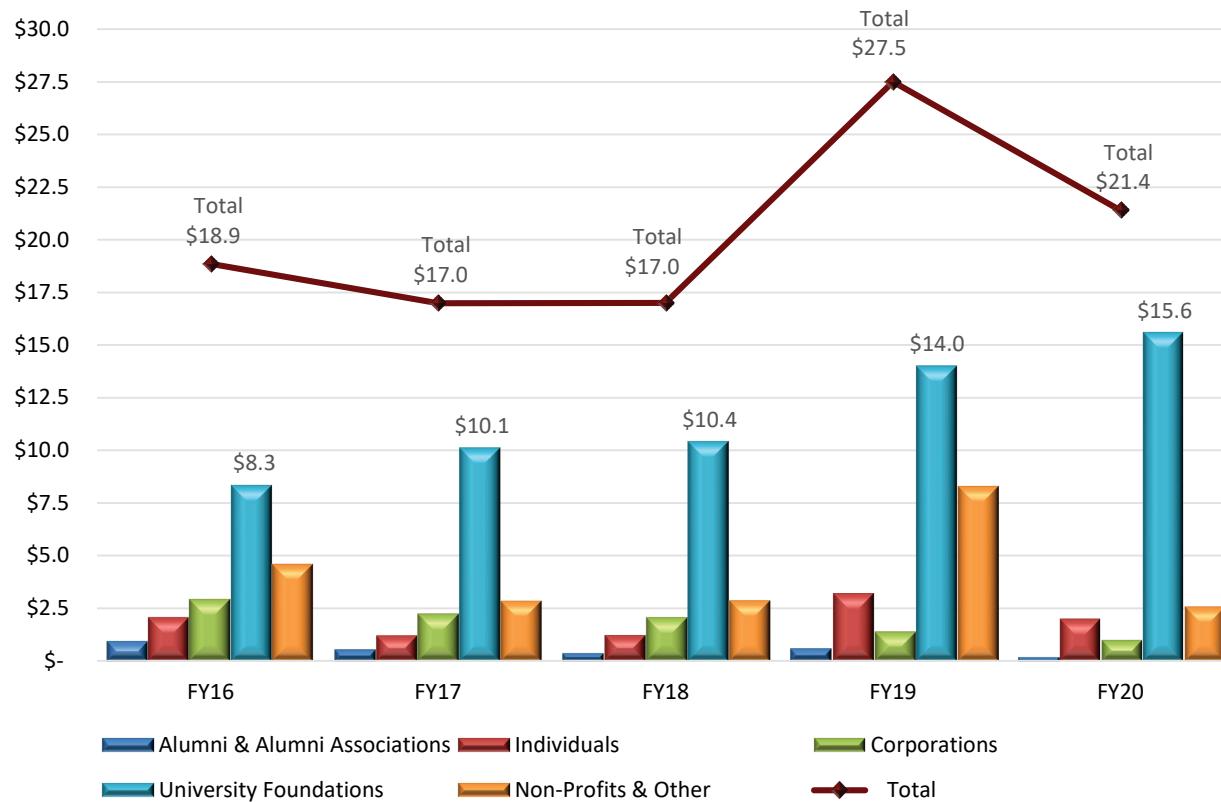
Year Ended June 30, 2020

# Part I: University of Maine System

(Excludes Fund Raising Organizations)

# UMS Gifts Received\* by Donor Type

(\$ in millions)



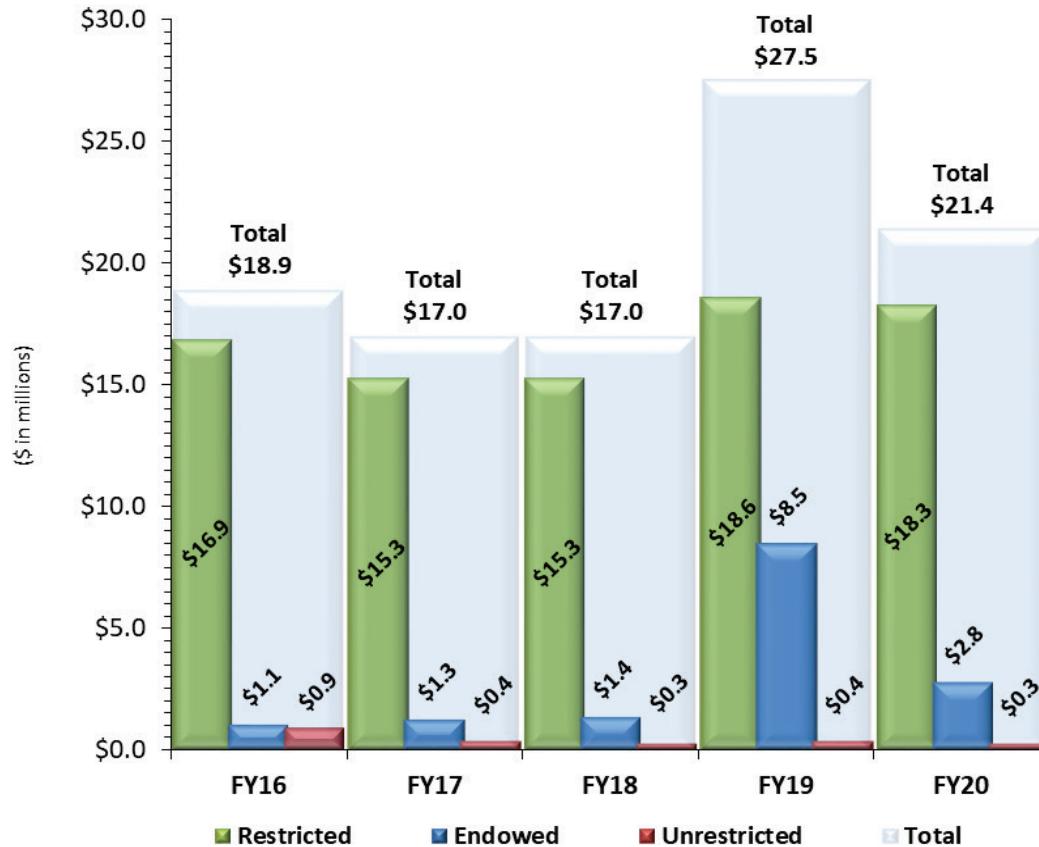
The UMS receives gifts through two methods:

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 10 for FY19 and FY20 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

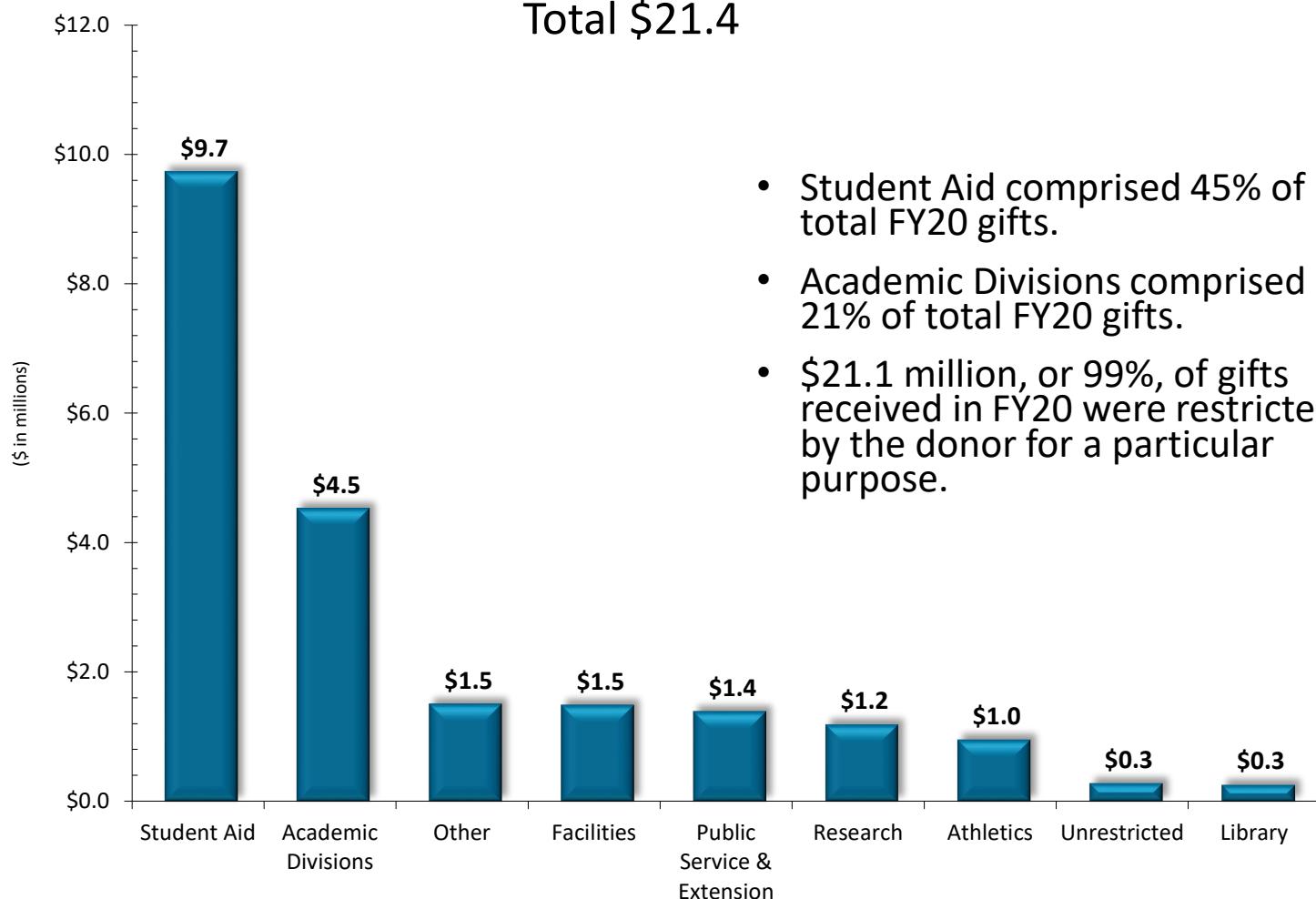
(\$ in millions)



Endowed gifts decreased from FY19 to FY20 primarily due to a one-time \$5 million gift to the University of Maine in FY19.

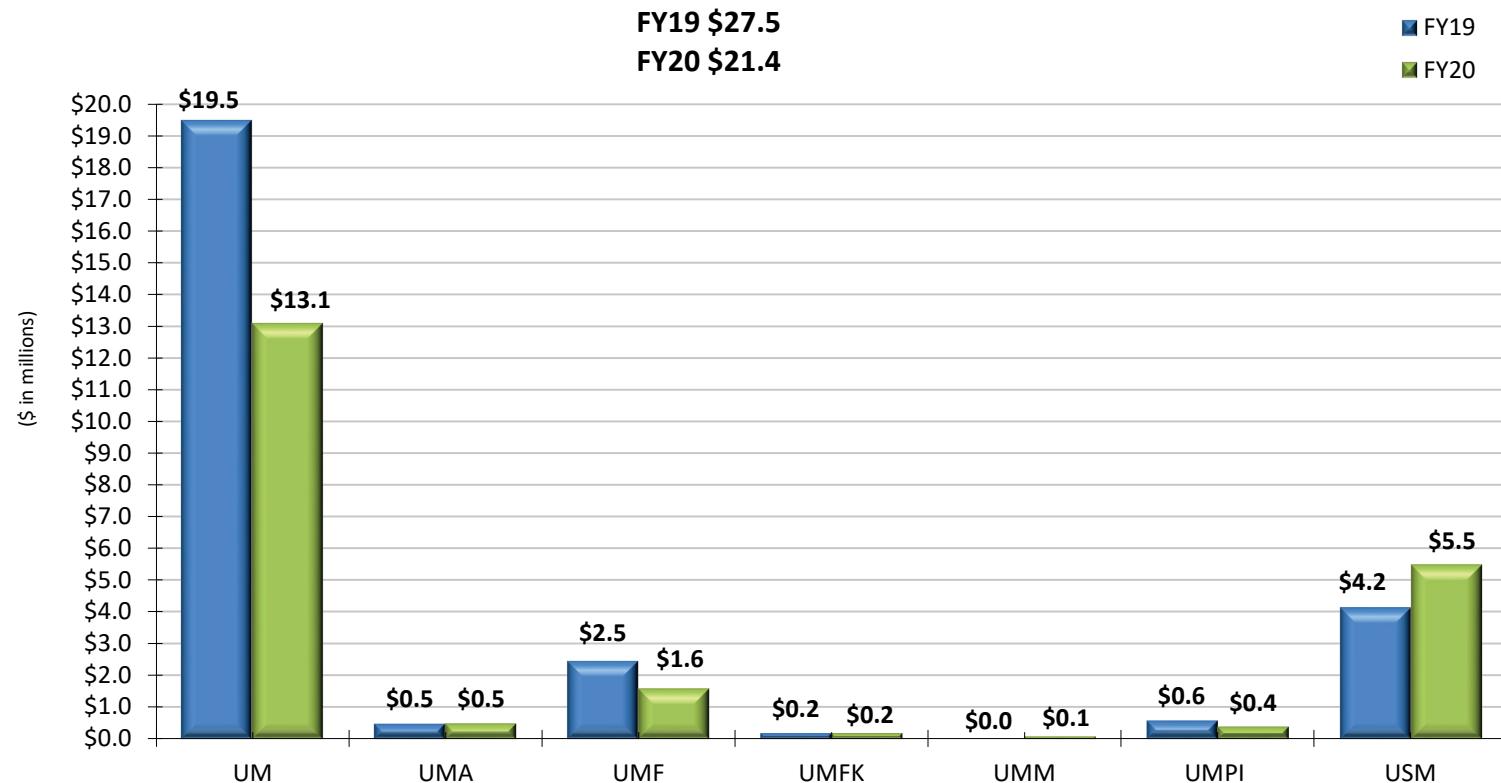
# UMS FY20 Gifts Received by Purpose

(\$ in millions)



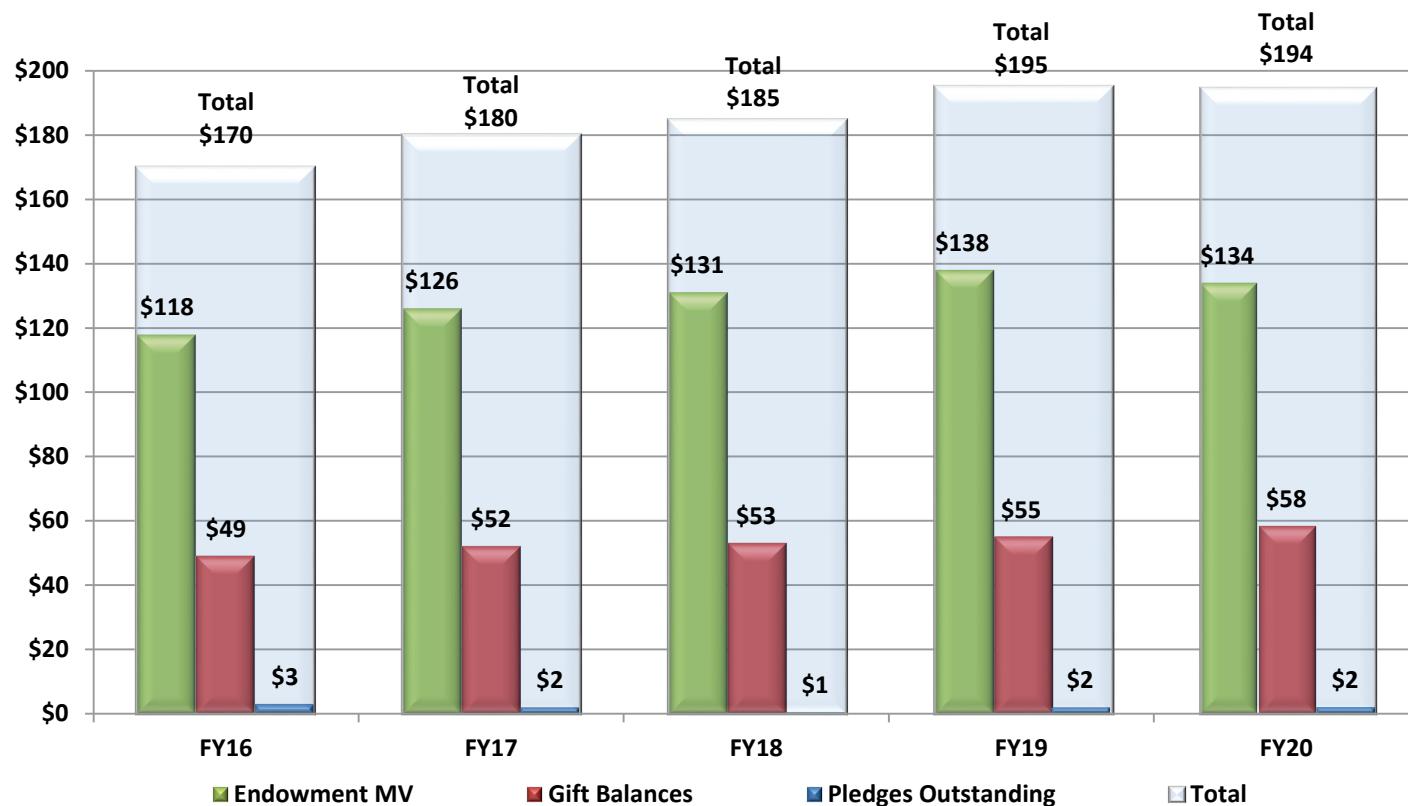
# UMS Gifts Received by Campus

(\$ in millions)



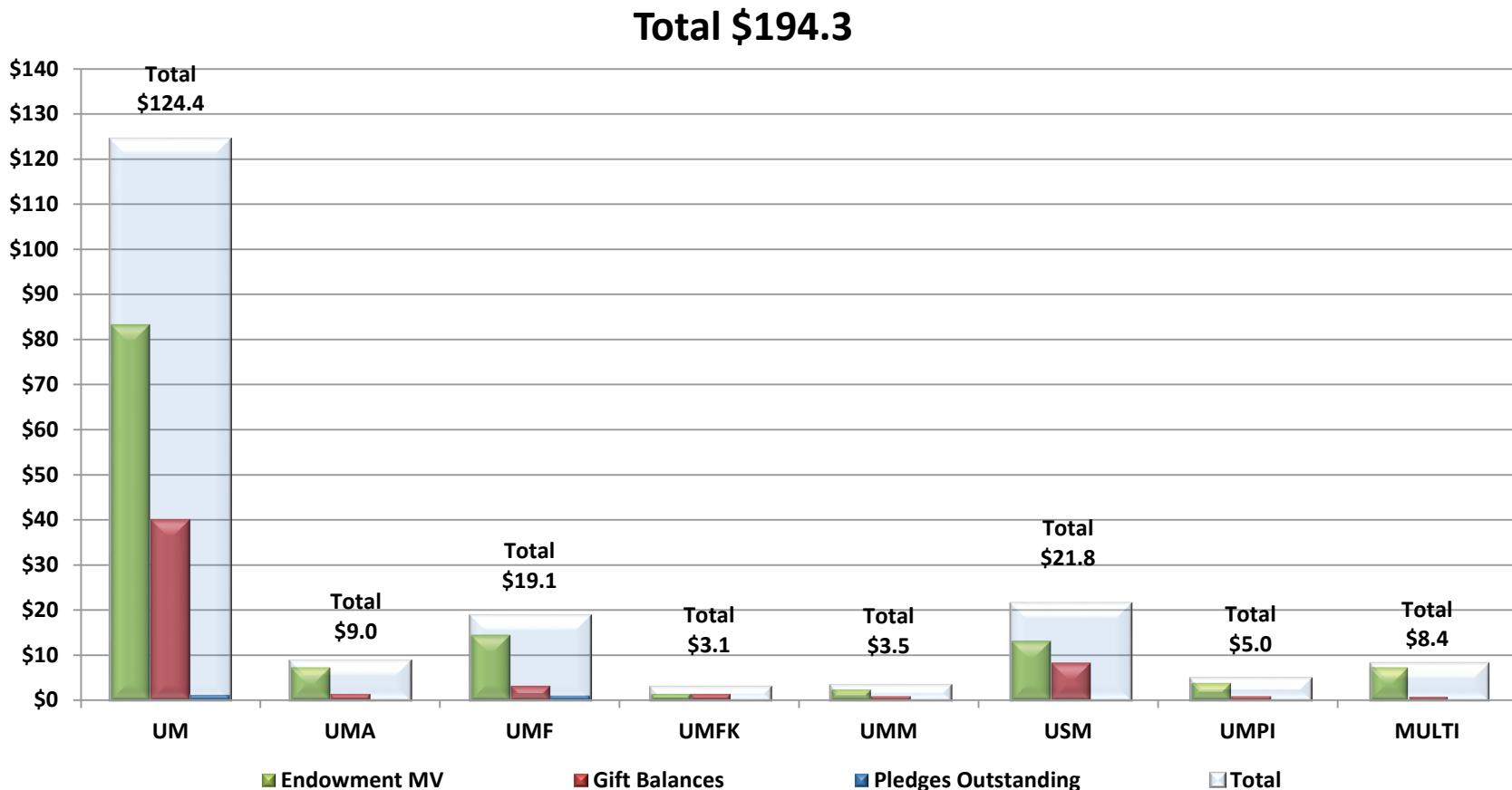
# UMS Gift Balances as of June 30th

(\$ in millions)



# UMS Gift Balances by Campus as of June 30, 2020

(\$ in millions)



# Part II: UMS Affiliated Fund Raising Organizations

# Gifts Received by UMS Affiliated Organizations

(\$ in thousands)

	<b>FY19</b>	<b>FY20</b>
<b>UM Affiliates</b>		
UM Alumni Association	\$ 207	\$ 165
UM Foundation	13,051	20,610
UM Pulp & Paper Foundation	736	1,881
4-H Camps at Tanglewood & Blueberry Cove	47	61
Maine 4-H Foundation	1,172	383
<b>UMFK Affiliates</b>		
UMFK Alumni Association	-	-
UMFK Foundation	147	141
John L. Martin Scholarship Fund	-	-
<b>UMM Alumni Association</b>	-	-
<b>Foundation of the University at Presque Isle</b>	204	118
<b>USM Affiliates</b>		
USM Foundation	4,344	5,014
UM Law School Foundation	1,098	1,167
Associates of the Osher Map Library (FY19 restated)	80	140
<b>UMS Affiliates</b>		
Maine Center Ventures	-	297
<b>Total Gifts Received by Affiliated Organizations</b>	<b>\$21,086</b>	<b>\$29,977</b>

48% of FY19 gifts and  
29% of FY20 gifts  
were from Alumni

16% of FY19 gifts and  
4% of FY20 gifts were  
from Alumni

# Endowment Market Values for UMS Affiliated Organizations

(\$ in millions)

	<b>FY19</b>	<b>FY20</b>
<b><i>UM Affiliates</i></b>		
UM Foundation <sup>a</sup>	\$ 227.1	\$ 228.1
UM Pulp & Paper Foundation	17.5	\$ 21.7
4-H Camps at Tanglewood & Blueberry Cove	0.3	\$ 0.4
Maine 4-H Foundation	3.5	\$ 3.9
<b><i>UMFK Affiliates</i></b>		
UMFK Foundation <sup>b</sup> *	2.5	\$ 2.6
John L. Martin Scholarship Fund*	0.1	\$ 0.1
<b><i>Foundation of the University at Presque Isle</i></b>	6.2	\$ 6.2
<b><i>USM Affiliates</i></b>		
USM Foundation*	21.9	\$ 23.2
UM Law School Foundation*	4.5	\$ 4.4
Associates of the Osher Map Library	2.7	\$ 2.8
<b>Total Endowment Market Value for Affiliated Organizations</b>	<b>\$ 286.3</b>	<b>\$ 293.4</b>

# Part III: Capital Campaigns

# Status of Capital Campaigns as of June 30, 2020

(*\$* in millions)

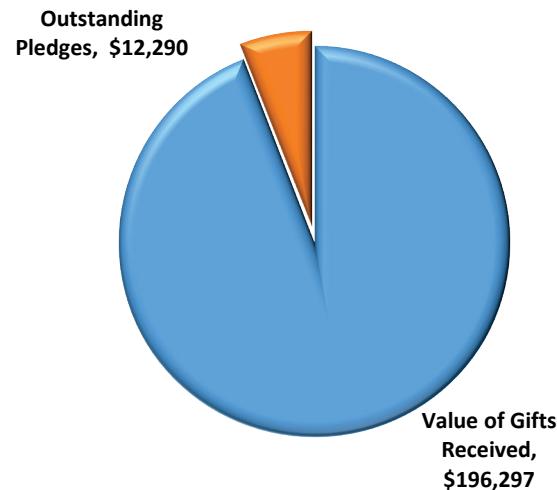
## Vision for Tomorrow Comprehensive Campaign (UM)

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

**Goal \$200,000**  
**Amount Raised \$208,587**



# Status of Capital Campaigns as of June 30, 2020 - continued

## Great University Campaign (formerly the 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, a variety of factors that could not have been anticipated have reshaped USM's fundraising priorities, and hence the direction of capital campaign fundraising.

The USM Foundation (the Foundation) engaged fundraising counsel to lead a campaign design exercise, which culminated in January 2020. In March 2020, the Foundation's Board approved moving forward with the following redesigned campaign:

1. 5-year working goal of \$46 million to raise the following funds:
  - \$15 million for scholarships
  - \$15 million towards a Center for the Arts
  - \$5 million to complete USM's Career and Student Success Center
  - \$11 million for other programs and annual funds
2. Campaign working titled changed to the "Great University" campaign
3. Launch date of 7/1/2020.

Below is an update for the four fundraising priorities presented to the UMS Board of Trustees in May 2017 as part of the original Next Generation Comprehensive Campaign:

1. During FY20 no additional funds were raised for the Center for the Arts, previously known as the Performing Arts Center; however, the initiative is included in the redesigned Great University campaign mentioned above.
2. An additional \$38,474 was raised for the Promise Scholars Program, for a total raised to date of \$3,821,682 (not including \$1.1M in bequest intentions). After reviewing what it takes to fully support the Promise Scholars program, the original \$15M goal was modified to a goal of \$5.8M in endowed scholarships, and \$750,000 in spendable scholarships.
3. The Risk Management & Insurance Program chair campaign did not raise any additional funding in FY20 for a total raised of \$1.8 million. The goal remains \$3 million.
4. Athletics remains a key university priority, but particularly in light of Covid-19, no significant gains were made in FY20.