



# Annual Report on Gifts, Fundraising and Endowments

Year Ended June 30, 2021

# Acronym Key

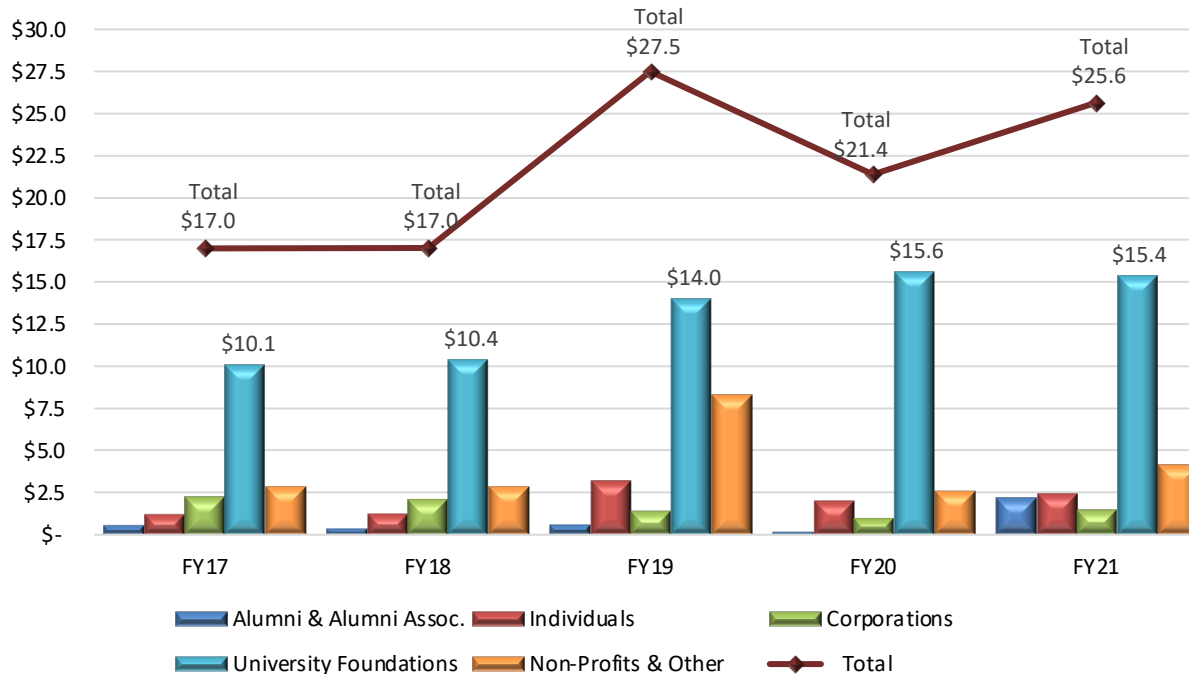
- UMS = University of Maine System
- FY = fiscal year
- UM = University of Maine
- UMA = University of Maine at Augusta
- UMF = University of Maine at Farmington
- UMFK = University of Maine at Fort Kent
- UMM = University of Maine at Machias
- UMPI = University of Maine at Presque Isle
- USM = University of Southern Maine
- Endowment MV = Endowment Market Value

[Link to Accessible Text Only Description of Slides](#)

# Part I: University of Maine System

(Excludes Fund Raising Organizations)

# UMS Gifts Received\* by Donor Type (\$ in millions)



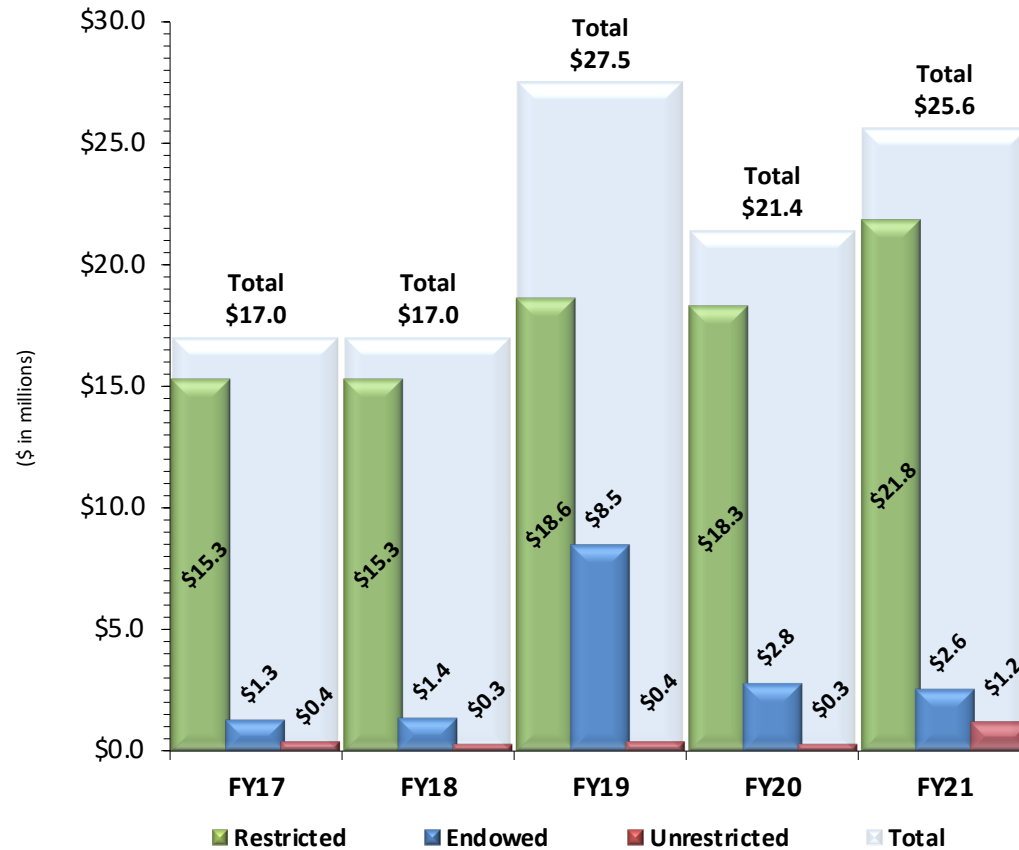
The UMS receives gifts through two methods:

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 FY20 and FY21 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.

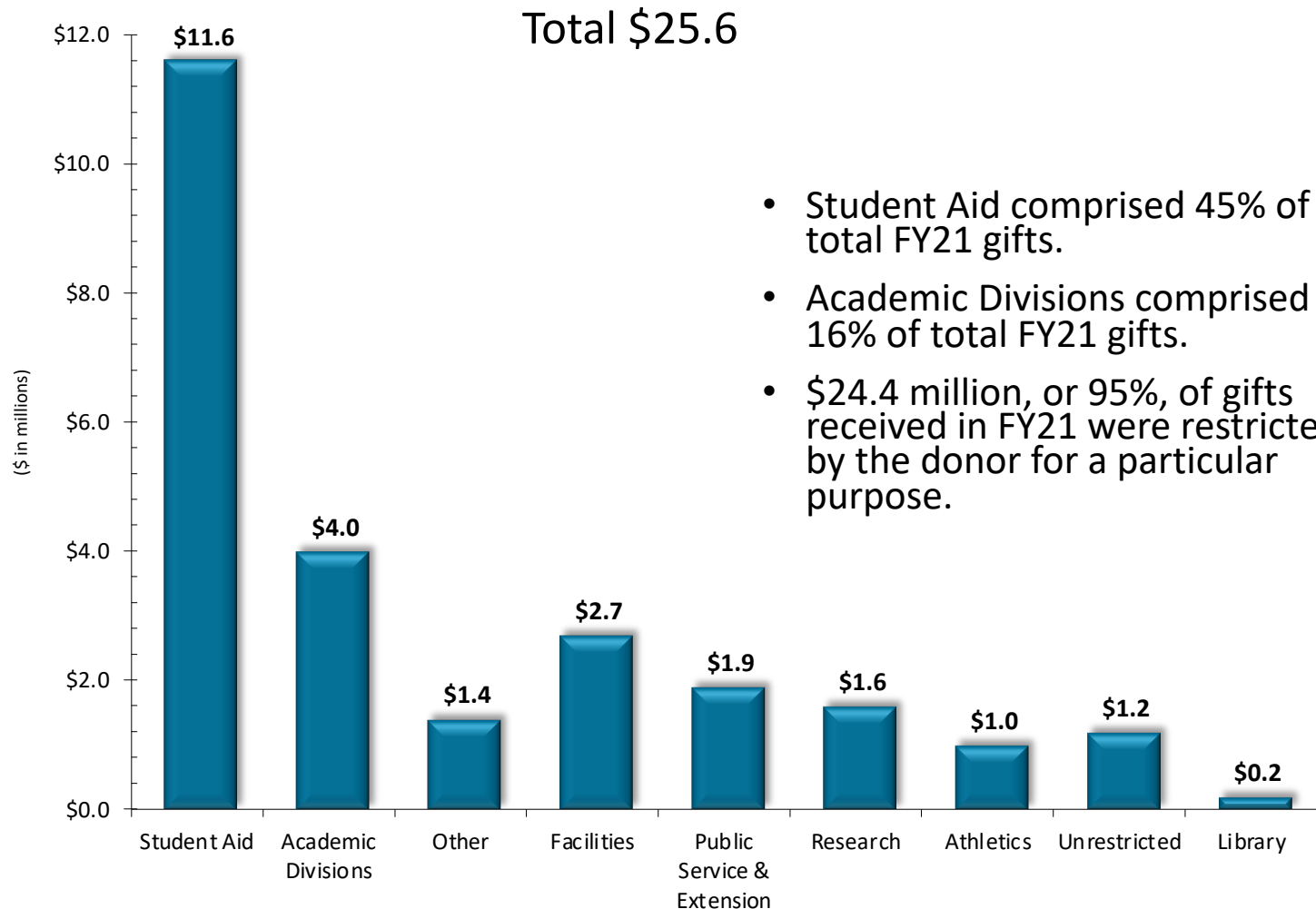
# UMS Gifts Received by Restriction Type

(\$ in millions)



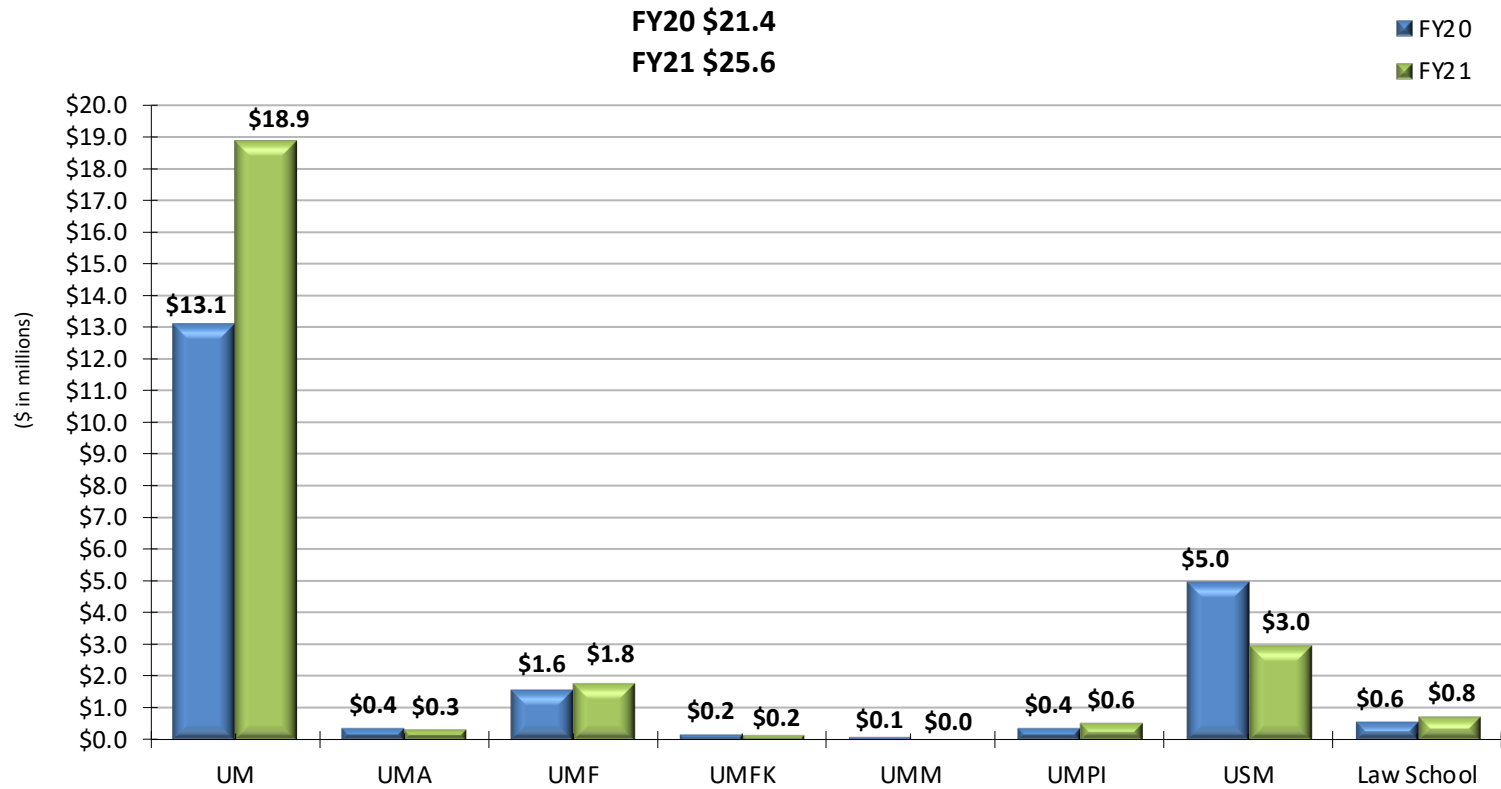
Restricted gifts increased from FY20 to FY21 primarily due to three one-time bequests to the University of Maine in FY21 totaling just over \$2.2 million.

# UMS FY21 Gifts Received by Purpose (\$ in millions)



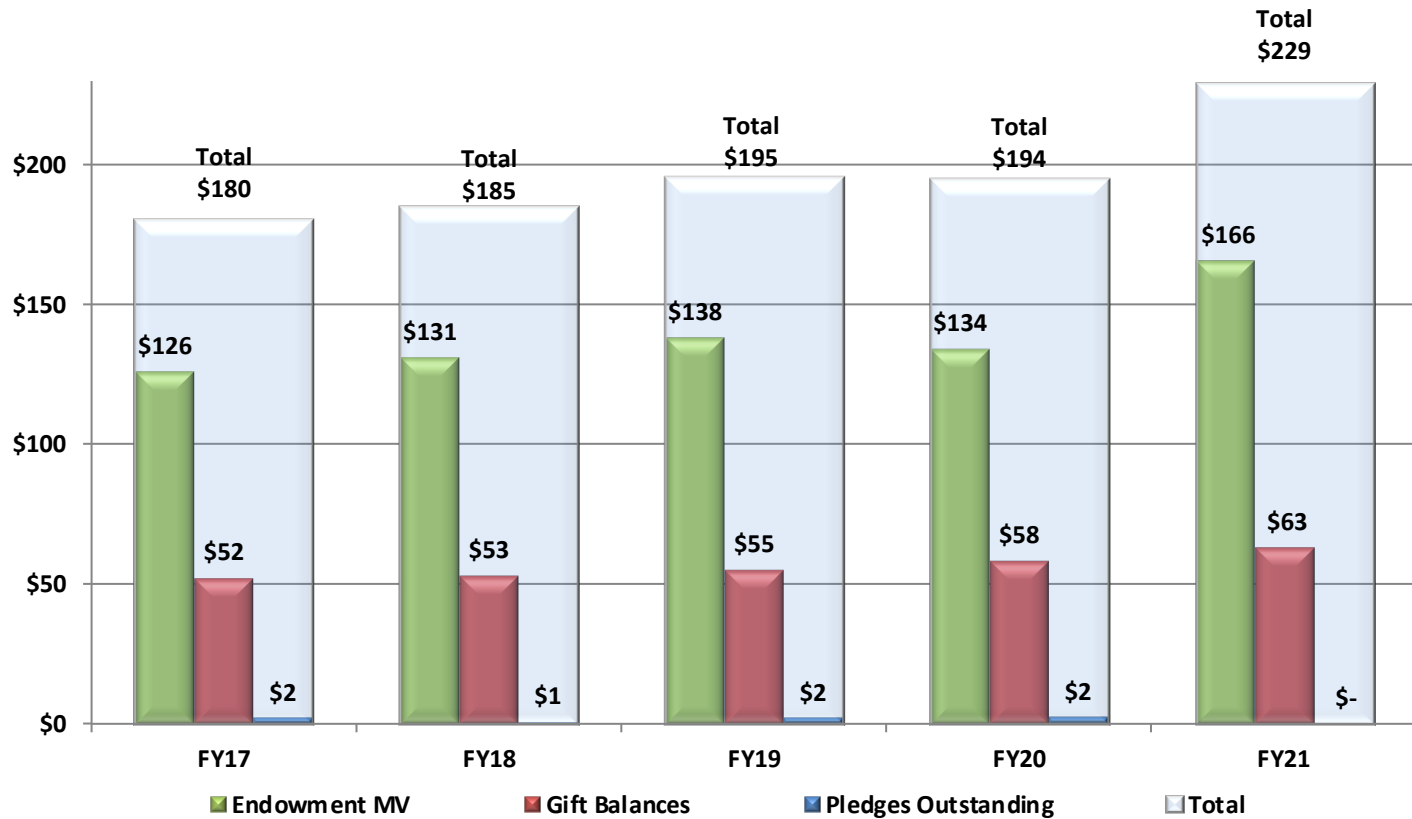
# UMS Gifts Received by Campus

(\$ in millions)



# UMS Gift Balances as of June 30th

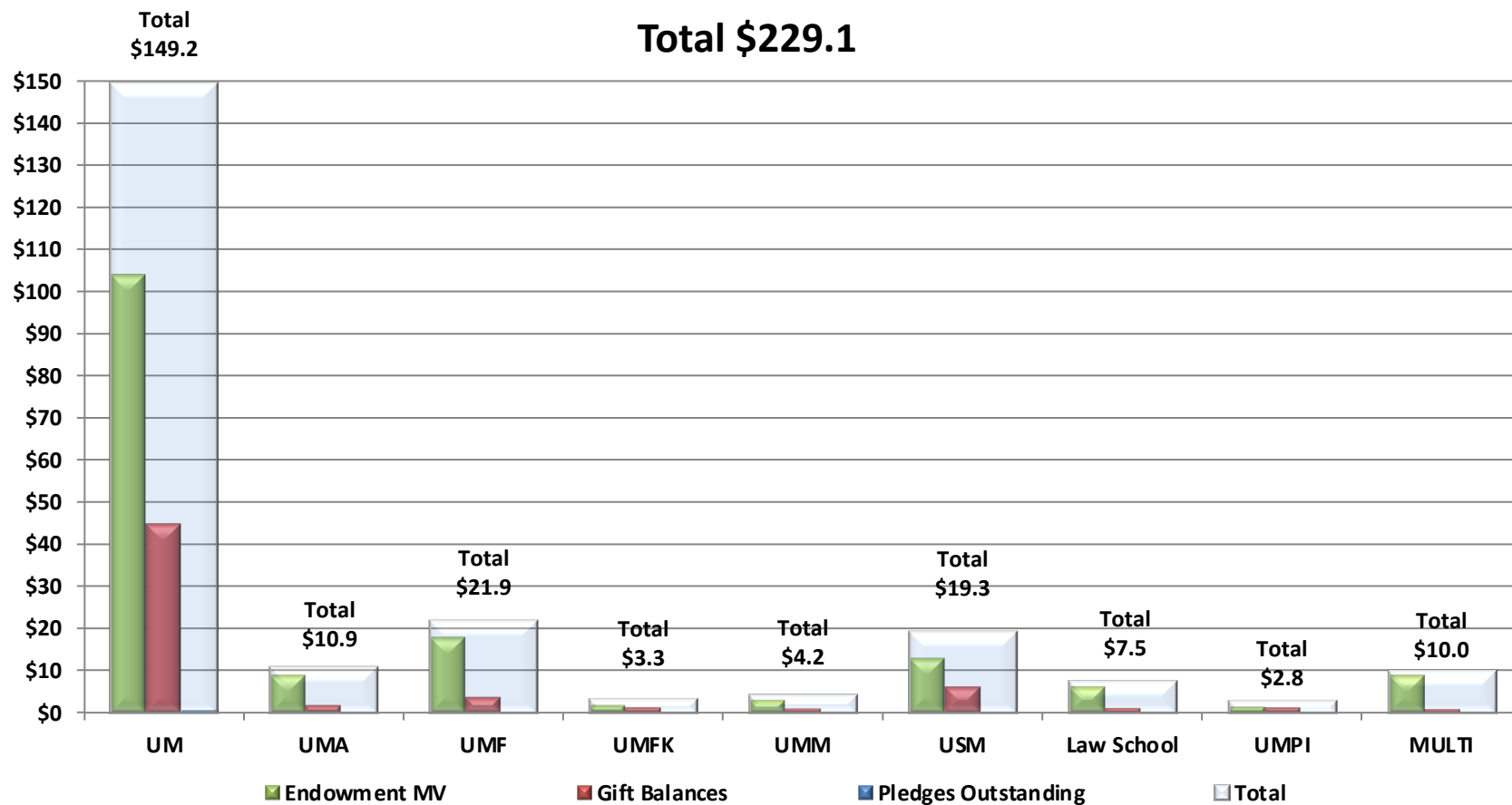
(\$ in millions)





# UMS Gift Balances by Campus as of June 30, 2021

(\$ in millions)



# Part II: UMS Affiliated Fund Raising Organizations

# Gifts Received by UMS Affiliated Organizations

(\$ in thousands)

	FY20	FY21
<b>UM Affiliates</b>		
UM Alumni Association	\$ 165	\$ 225
UM Foundation	20,610	19,372
UM Pulp & Paper Foundation	1,881	486
Tanglewood 4-H Camp & Learning Center	61	36
Maine 4-H Foundation	383	453
<b>UMFK Affiliates</b>		
UMFK Alumni Association	-	-
UMFK Foundation	141	56
John L. Martin Scholarship Fund	-	-
<b>UMM Alumni Association</b>	-	-
<b>Foundation of the University at Presque Isle</b>	118	115
<b>USM Affiliates</b>		
USM Foundation	5,014	12,521
UM Law School Foundation	1,167	795
Associates of the Osher Map Library (FY19 restated)	140	52
<b>UMS Affiliates</b>		
Maine Center Ventures	297	1,382

29% of FY20 gifts and  
31% of FY21 gifts  
were from Alumni

4% of FY20 gifts and  
FY21 gifts were from  
Alumni

**Total Gifts Received by Affiliated Organizations**

**\$29,977    \$35,493**

# Endowment Market Values for UMS Affiliated Organizations

(\$ in millions)

Endowment Market Values for UMS Affiliated Organizations		
\$ in millions		
	FY20	FY21
<b><i>UM Affiliates</i></b>		
UM Foundation <sup>a</sup>	\$ 228.1	\$ 310.1
UM Pulp & Paper Foundation	\$ 21.7	\$ 24.5
Tanglewood 4-H Camp & Learning Center	\$ 0.4	\$ 0.4
Maine 4-H Foundation	\$ 3.9	\$ 4.3
<b><i>UMFK Affiliates</i></b>		
UMFK Foundation <sup>b *</sup>	\$ 2.6	\$ 3.2
John L. Martin Scholarship Fund <sup>*</sup>	\$ 0.1	\$ 0.1
<b><i>Foundation of the University at Presque Isle</i></b>	\$ 6.2	\$ 7.5
<b><i>USM Affiliates</i></b>		
USM Foundation <sup>*</sup>	\$ 23.2	\$ 31.9
UM Law School Foundation <sup>*</sup>	\$ 4.4	\$ 6.3
Associates of the Osher Map Library	\$ 2.8	\$ 3.6
<b>Total Endowment Market Value for Affiliated Organizations</b>	<b>\$ 293.4</b>	<b>\$ 391.9</b>

<sup>a</sup> UM Foundation totals include UM Alumni Association endowments.

<sup>b</sup> UMFK Foundation totals include UMFK Alumni Association endowments.

<sup>\*</sup> Endowment included in the UMS Managed Investment Pool.

# Part III: Capital Campaigns

# Status of Capital Campaigns as of June 30, 2021

(\$ in millions)

## **UM Comprehensive Campaign**

UM is currently drafting their next capital campaign and is in the process of hiring fundraising counsel and setting campaign goals to be presented to the Board of Trustees for approval at a later date.

# Status of Capital Campaigns as of June 30, 2021 - continued

## **Great University Campaign (formerly the Next Generation Comprehensive Campaign) (USM)**

The University of Southern Maine (USM) obtained approval at the May 11, 2017 UMS Board of Trustees meeting to undertake an anticipated \$80 million comprehensive fundraising campaign. In 2019, the USM Foundation (USMF) engaged campaign counsel, CCS Fundraising, to conduct a campaign feasibility, planning and design study. In 2020, informed by study results, the Foundation's Board of Directors unanimously voted to move forward with the campaign, renamed the "Great University Campaign"—a multi-year comprehensive fundraising effort with a working goal of \$46M formally launched on July 1, 2020. The overall campaign goal was modified from an \$80M fundraising goal to \$46M in response to the aforementioned campaign planning study which assessed the Foundation's fundraising capacity, including donor interest and inclination to give in a variety of areas.

As of June 30, 2021, over \$19.6 million (or 42%) of the \$46 million goal has been raised.