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Annual Report on Gifts, Fund Raising, and Endowments

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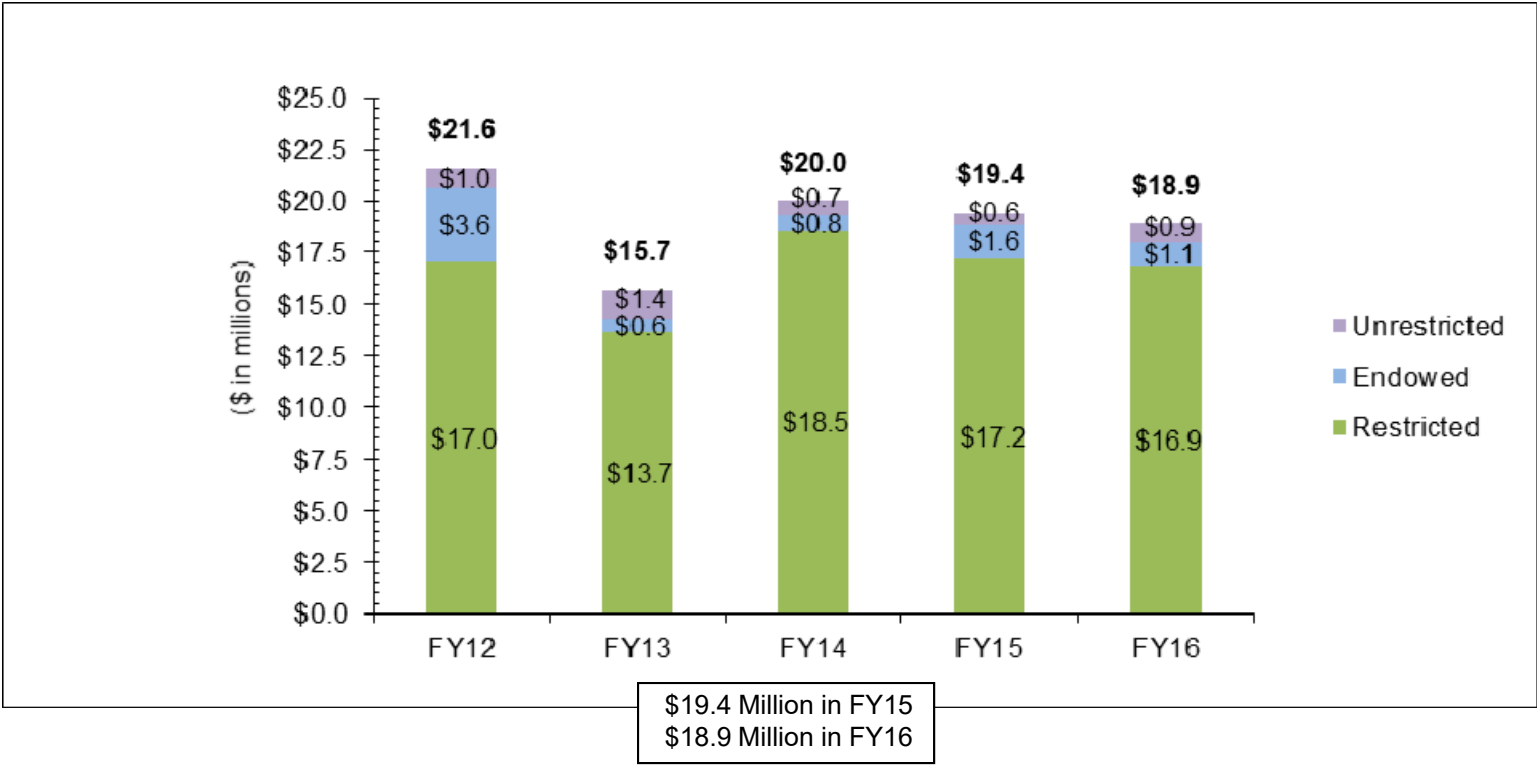
University of Maine System

Annual Report on Gifts, Fundraising and Endowments

Year Ended June 30, 2016

Gifts Received* by Restriction Type

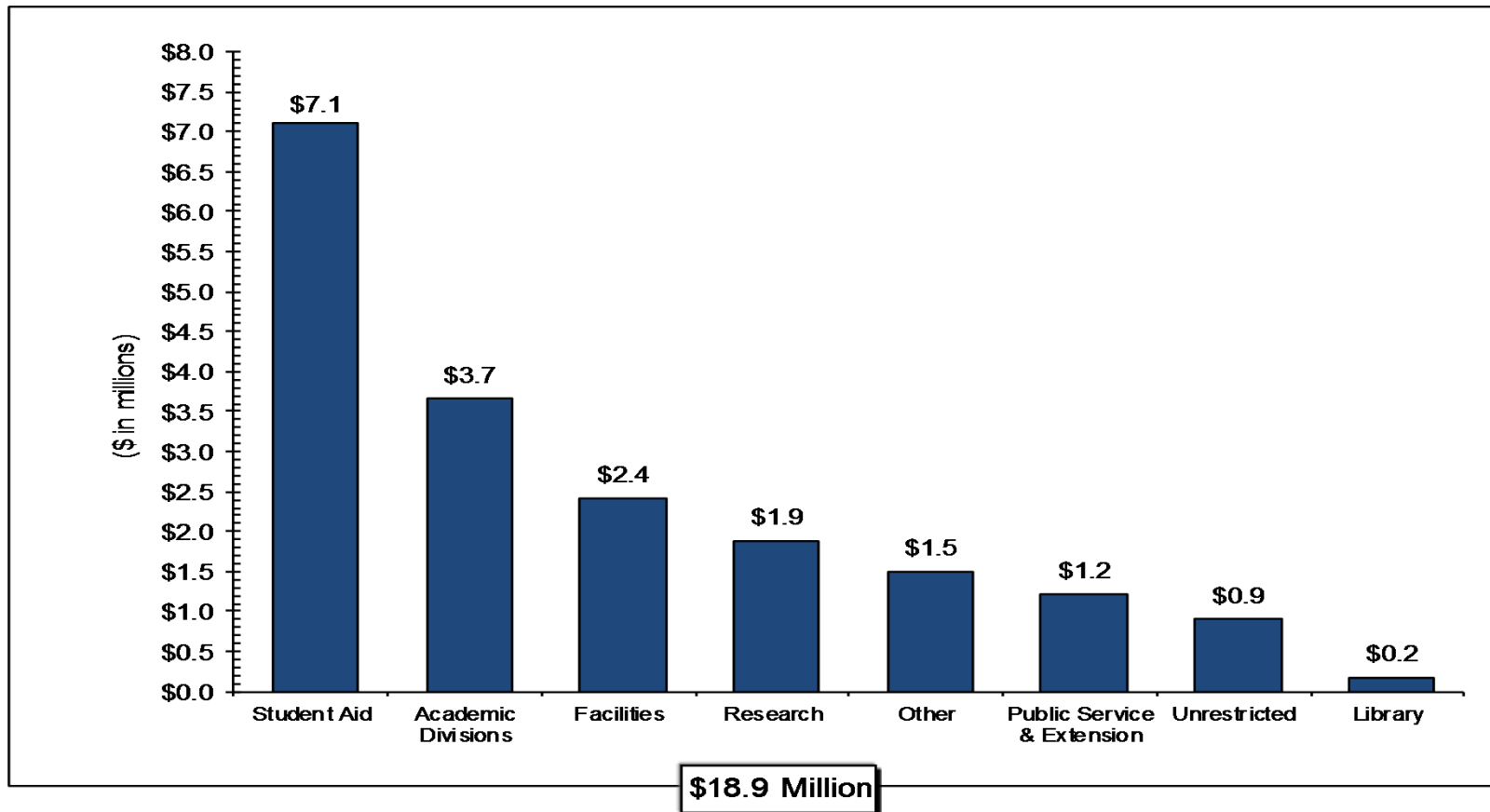
(\$ in millions)



* 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.

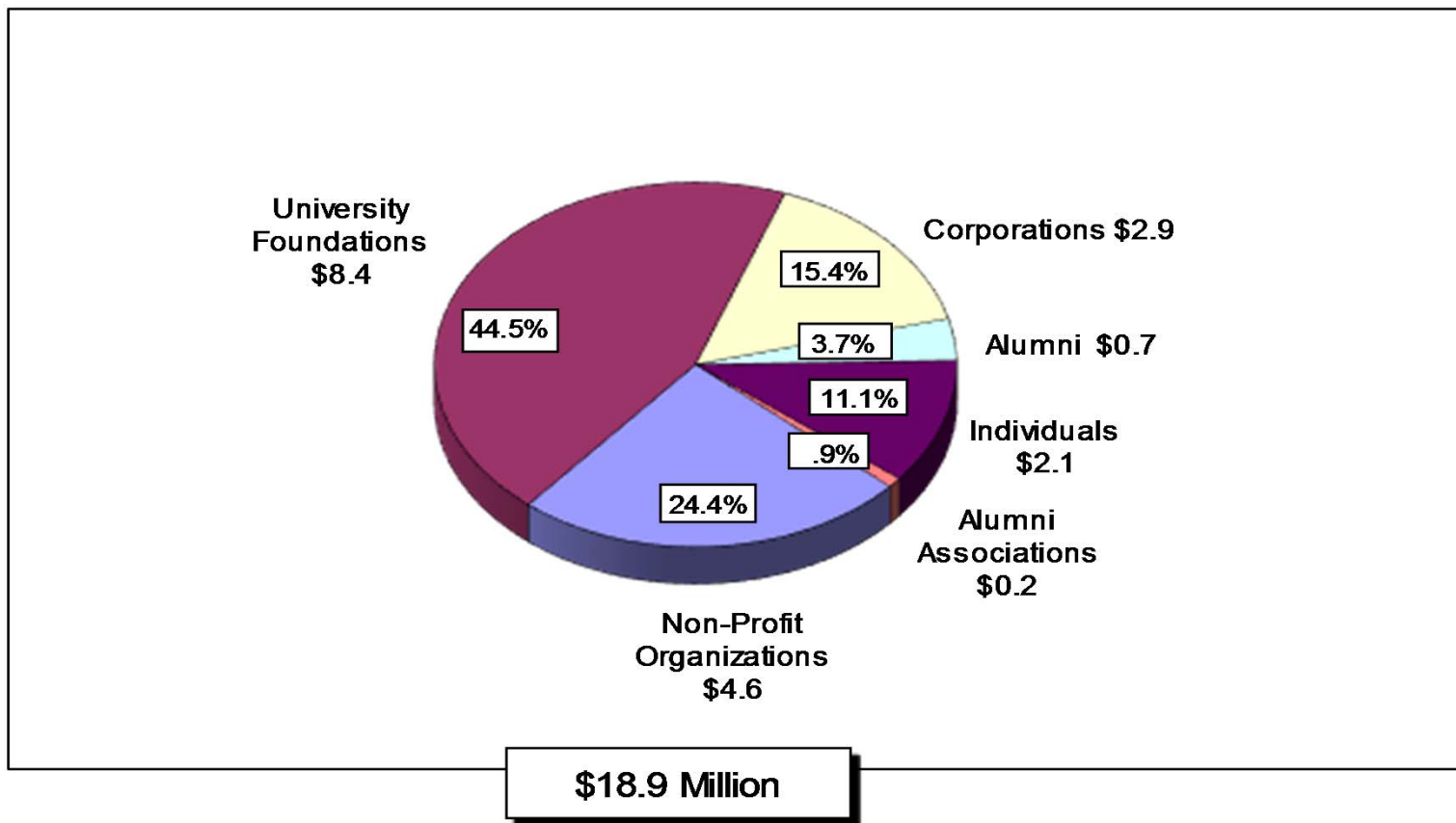
FY16 Gifts Received by Purpose

(\$ in millions)



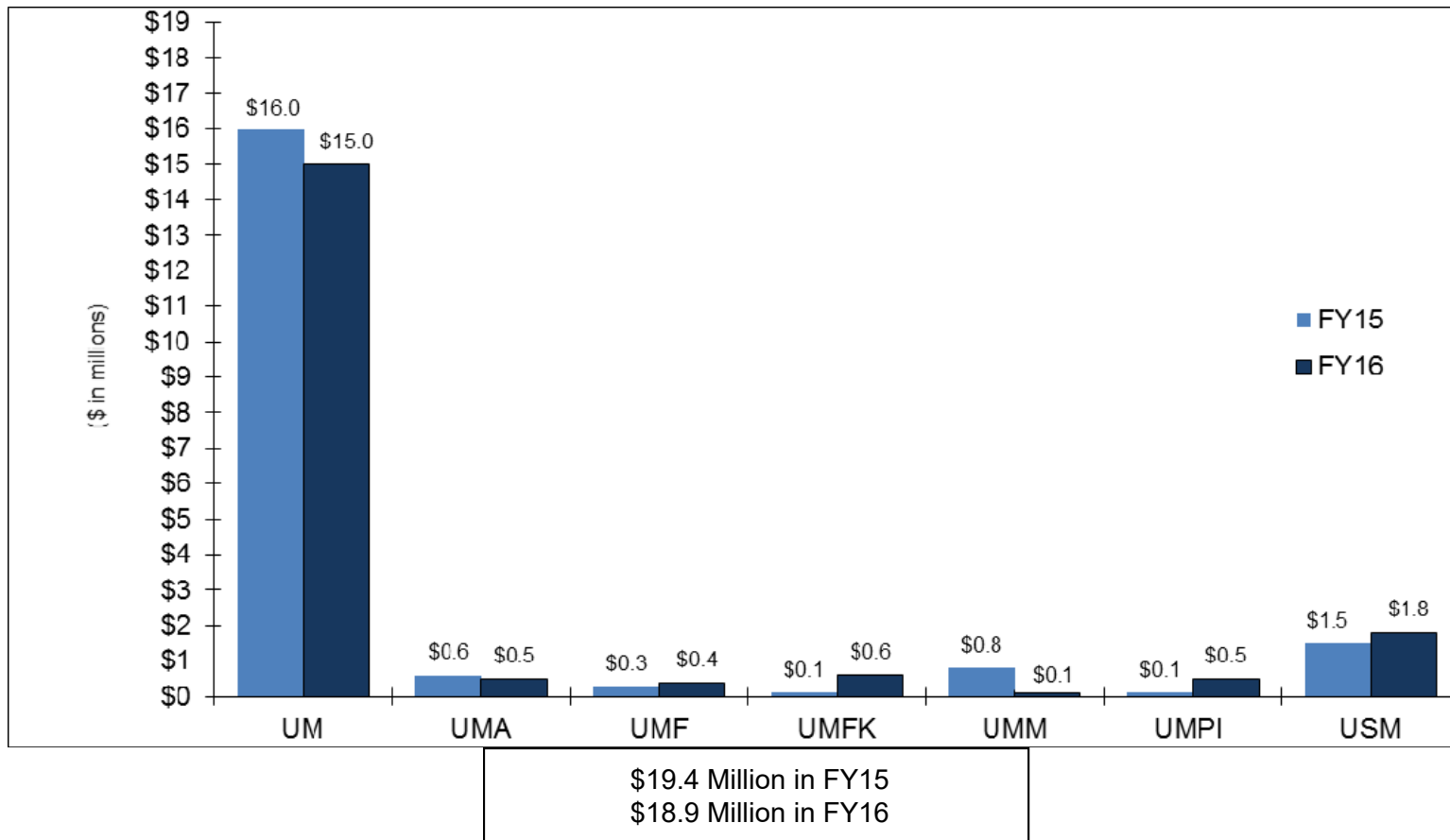
FY16 Gifts Received by Donor Type

(\$ in millions)



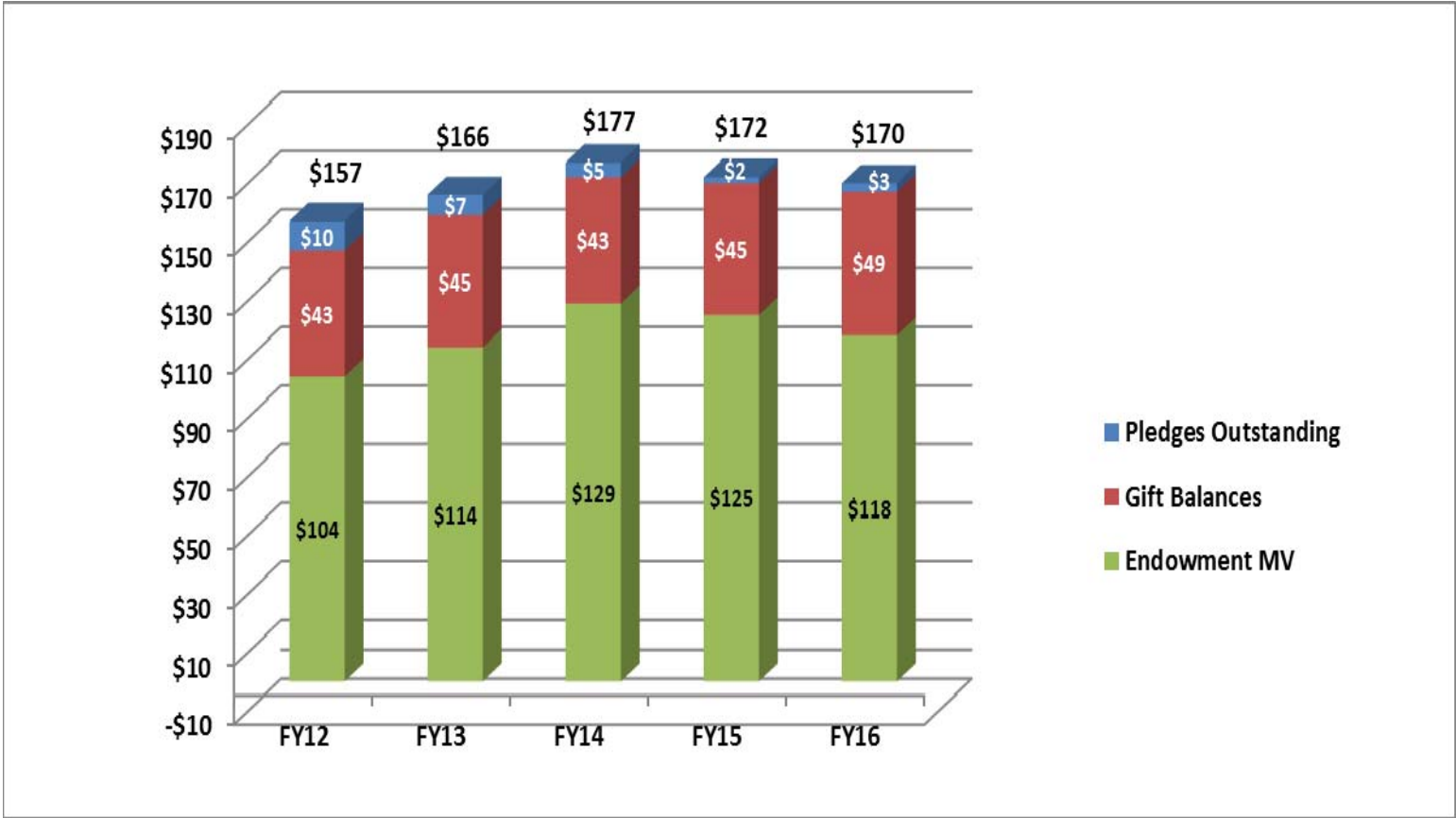
Gifts Received by Campus

(\$ in millions)



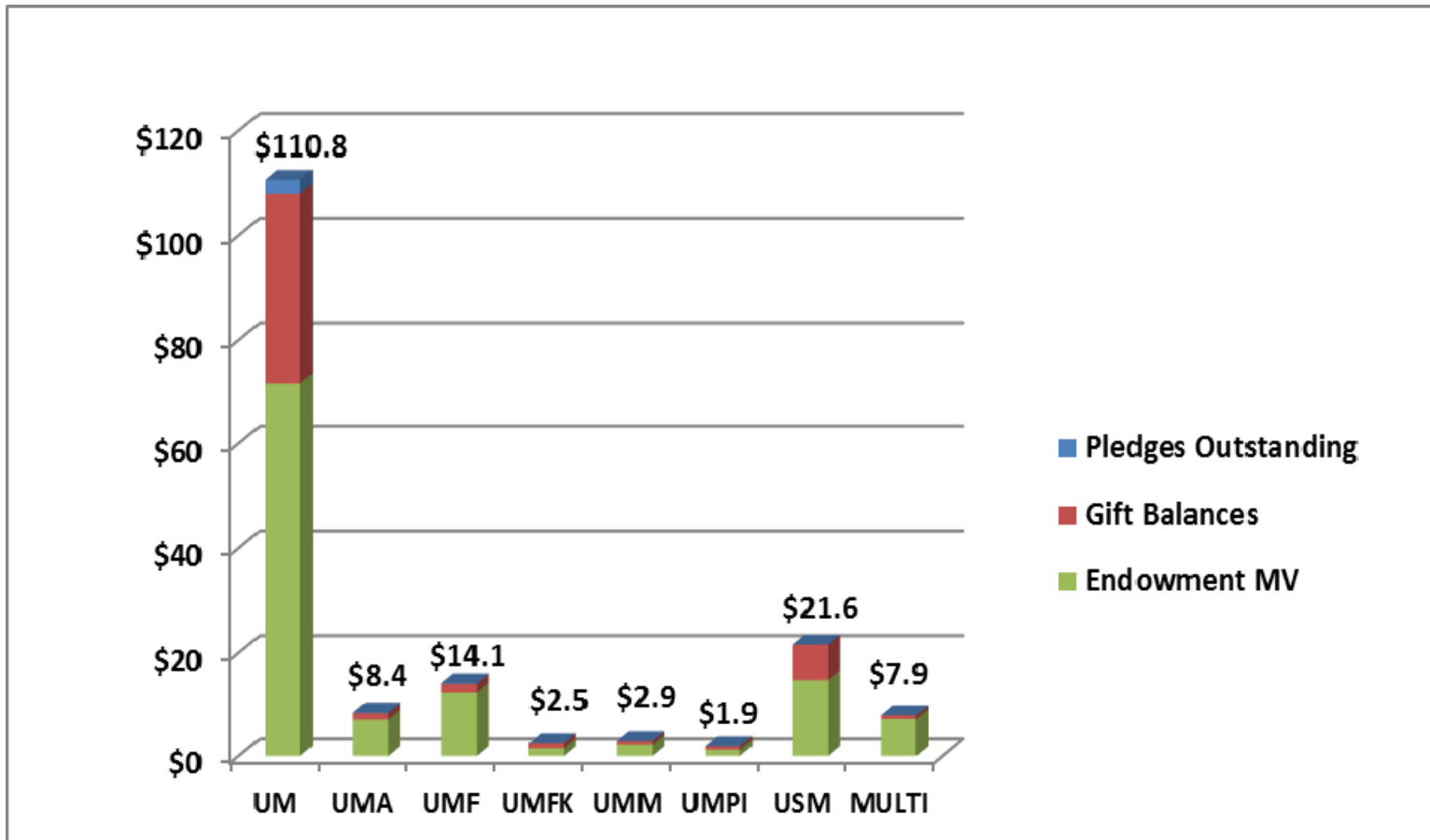
UMS Gift Balances by Fiscal Year

(\$ in millions)



FY16 UMS Gift Balances by Campus

(\$ in millions)



\$170.1 Million



UMS Affiliated Fund Raising Organizations

Gifts Received by UMS Affiliated Organizations

(\$ in Thousands)

| | <u>2015</u> | <u>2016</u> |
|---|-------------------------|-------------------------|
| UM Affiliates | | |
| UM Alumni Association | \$ 265 | \$ 322 |
| UM Foundation | 10,563 | 9,116 |
| UM Pulp & Paper Foundation | 282 | 373 |
| Maine 4-H Foundation | 137 | 192 |
| UMA Foundation | - | - |
| UMFK Affiliates | | |
| UMFK Alumni Association | 7 | 7 |
| UMFK Foundation | 65 | 53 |
| John L. Martin Scholarship Fund | - | - |
| UMM Alumni Association | - | - |
| Foundation of the University at Presque Isle | 14 | 297 |
| USM Affiliates | | |
| USM Foundation | 2,141 | 2,851 |
| Maine Law Alumni Association | 186 | 290 |
| UM Law School Foundation | 531 | 434 |
| Total Gifts Received by Affiliated Organizations | <u><u>\$ 14,191</u></u> | <u><u>\$ 13,935</u></u> |

Endowment Market Values for UMS Affiliated Organizations

(\$ in millions)

| | <u>2015</u> | <u>2016</u> |
|--|------------------------|------------------------|
| UM Affiliates | | |
| UM Foundation | \$ 185.6 | \$ 179.9 |
| UM Pulp & Paper Foundation | 16.1 | 15.7 |
| 4-H Camps at Tanglewood & Blueberry Cove | 0.1 | 0.2 |
| Maine 4-H Foundation | 3.3 | 3.1 |
| UMA Foundation | 0.1 | 0.1 |
| UMFK Affiliates | | |
| UMFK Foundation* | 1.7 | 1.7 |
| John L. Martin Scholarship Fund* | 0.1 | 0.1 |
| Foundation of the University at Presque Isle | 4.4 | 4.5 |
| USM Affiliates | | |
| USM Foundation* | 16.2 | 16.2 |
| UM Law School Foundation* | 4.1 | 4.0 |
| Total Endowment Market Value for Affiliated Organizations | <u><u>\$ 231.7</u></u> | <u><u>\$ 225.5</u></u> |

* Endowment included in UMS Managed Investment Pool



Status of Capital Campaigns

(\$ in millions)

| <u>Development Activity</u> | <u>Start Date</u> | <u>End Date</u> | <u>Campaign Goal</u> | <u>Value of Gifts Received (as of 06/30/16)</u> | <u>Outstanding Pledges (as of 06/30/16)</u> | <u>Amount to Meet Goal (as of 06/30/16)</u> |
|-----------------------------------|-------------------|-----------------|----------------------|---|---|---|
| UMA 50th Anniversary Fund* | 07/01/14 | Open | \$5.0 | \$2.7 | \$2.2 | \$0.1 |

* The UMA 50th Anniversary Fund is a celebration of 50 years of achievement and preparation for the next 50 years.

Proceeds raised through the campaign are being targeted to five specific areas:

- Scholarships for non-traditional learners
- Veteran support
- Expansion of online and distance education
- Auditorium expansion
- Ongoing support of UMA's existing scholarship funds