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2018

## Annual Report on Gifts, Fund Raising, and Endowments Year Ended June 30, 2018

University of Maine System

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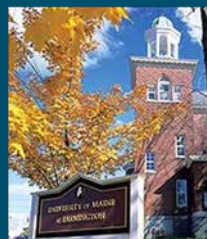
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# Annual Report on Gifts, Fundraising and Endowments

Year Ended June 30, 2018



# Gifts Received\* by Restriction Type

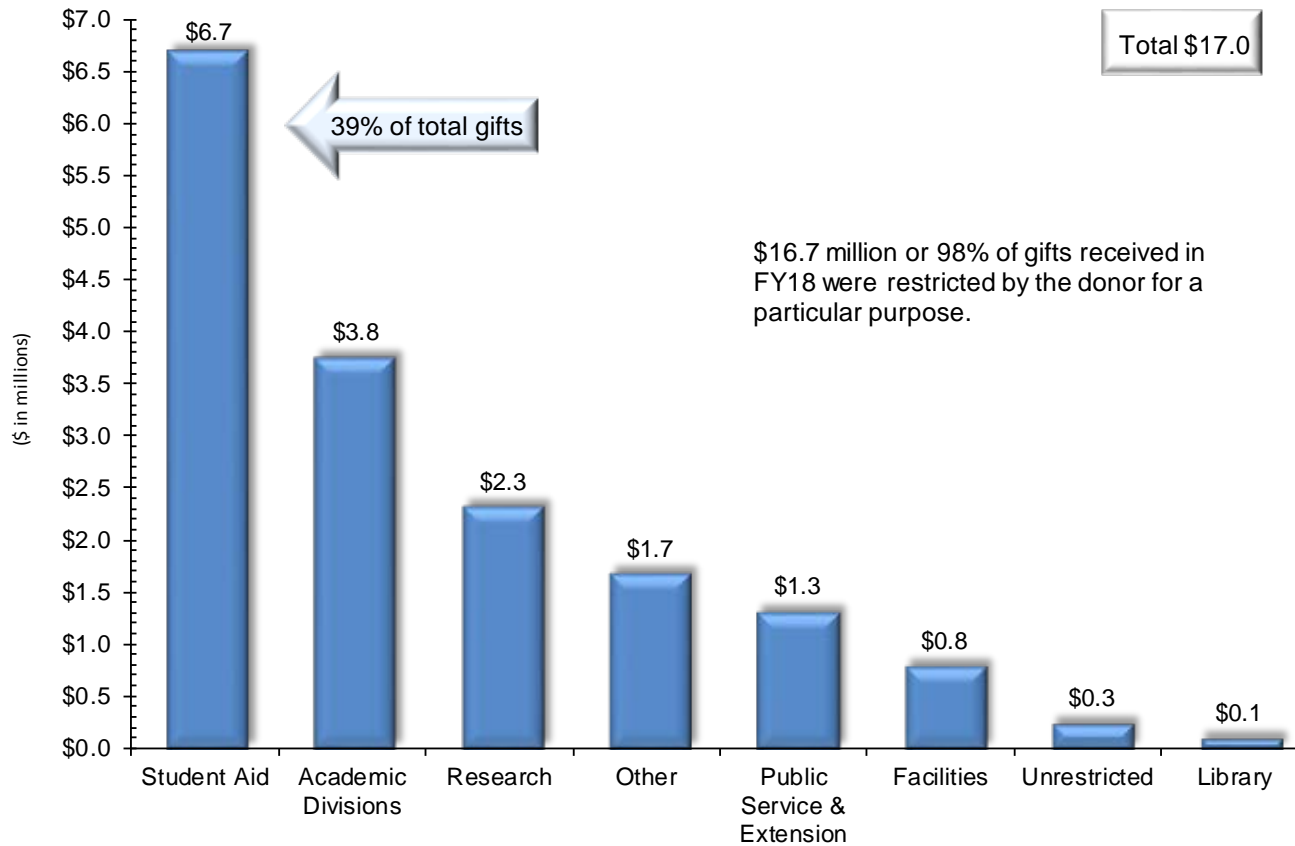
(\$ in millions)



\* 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.

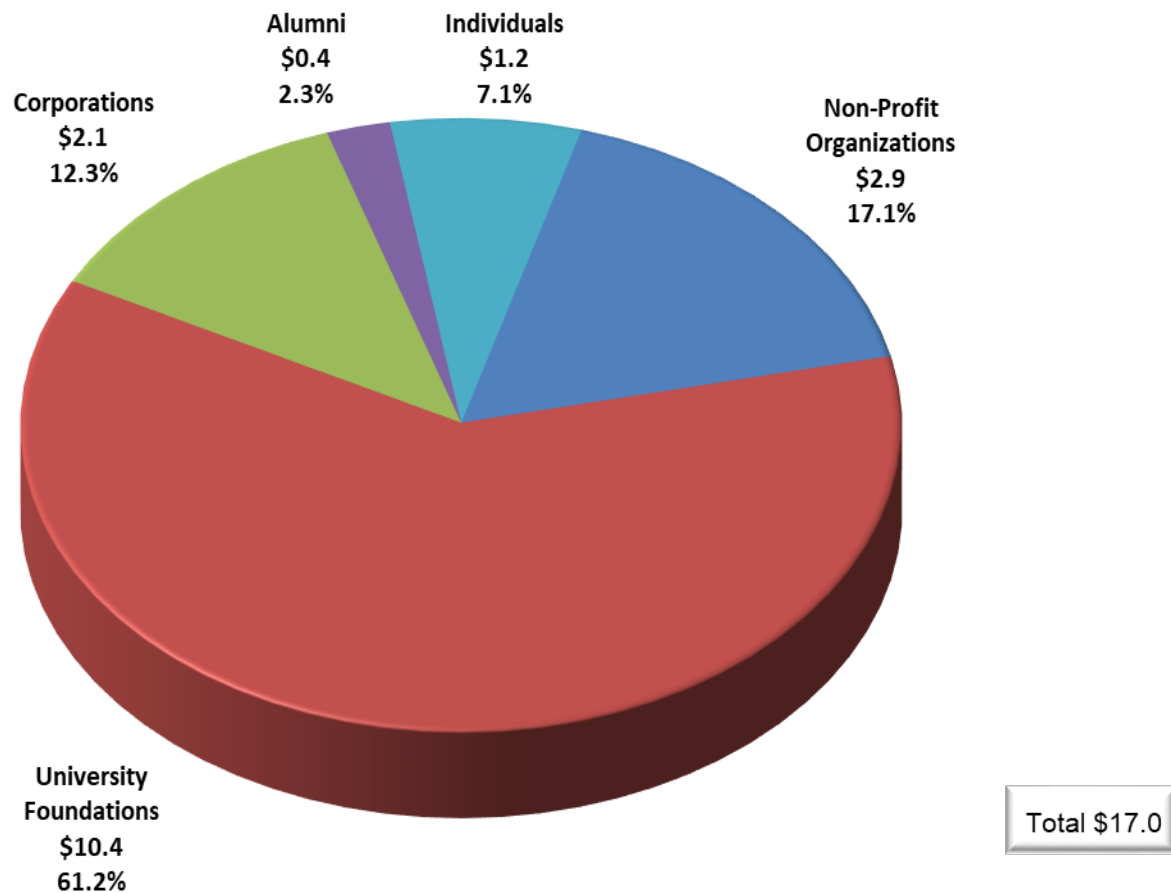
# FY18 Gifts Received by Purpose

(\$ in millions)



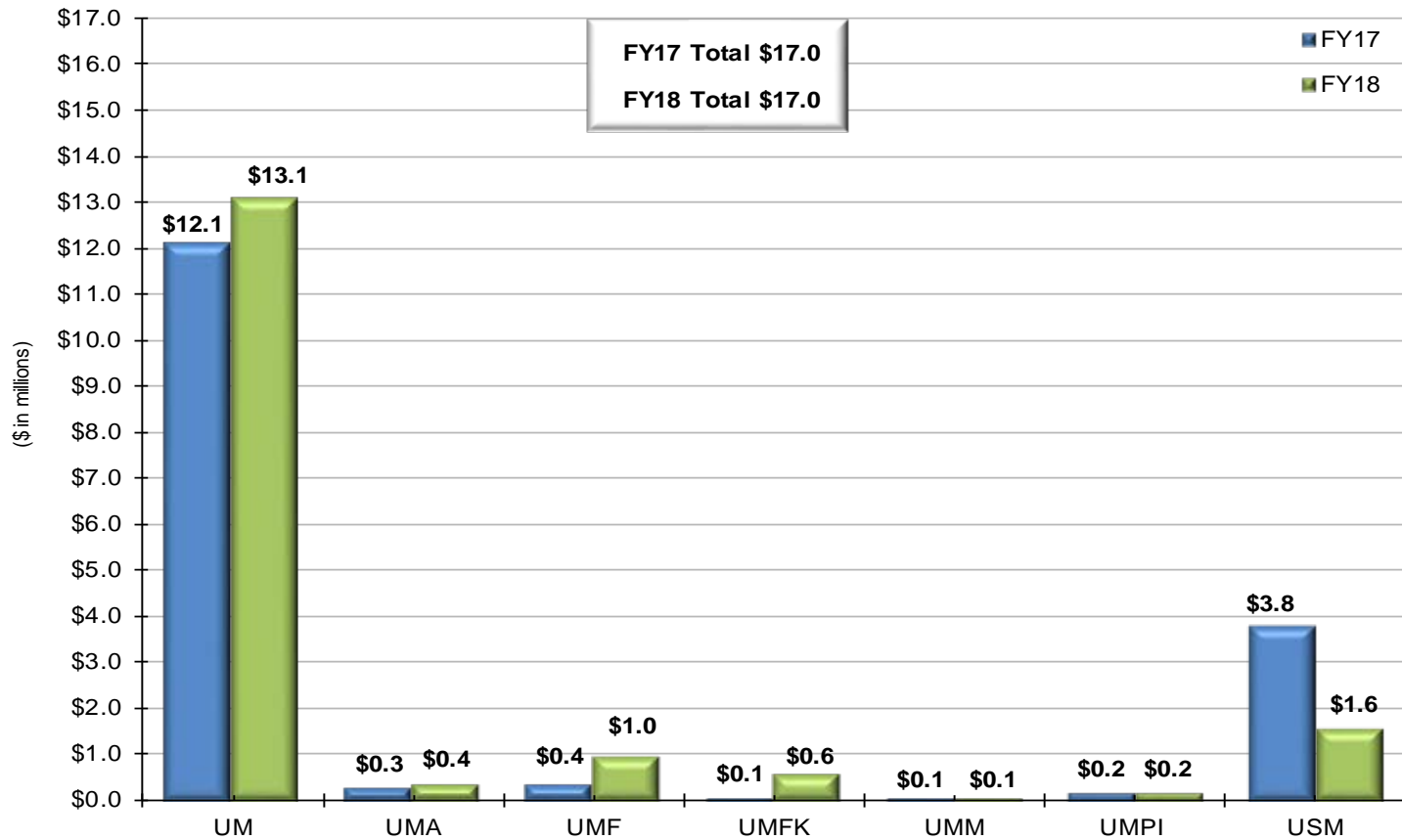
# FY18 Gifts Received by Donor Type

(\$ in millions)



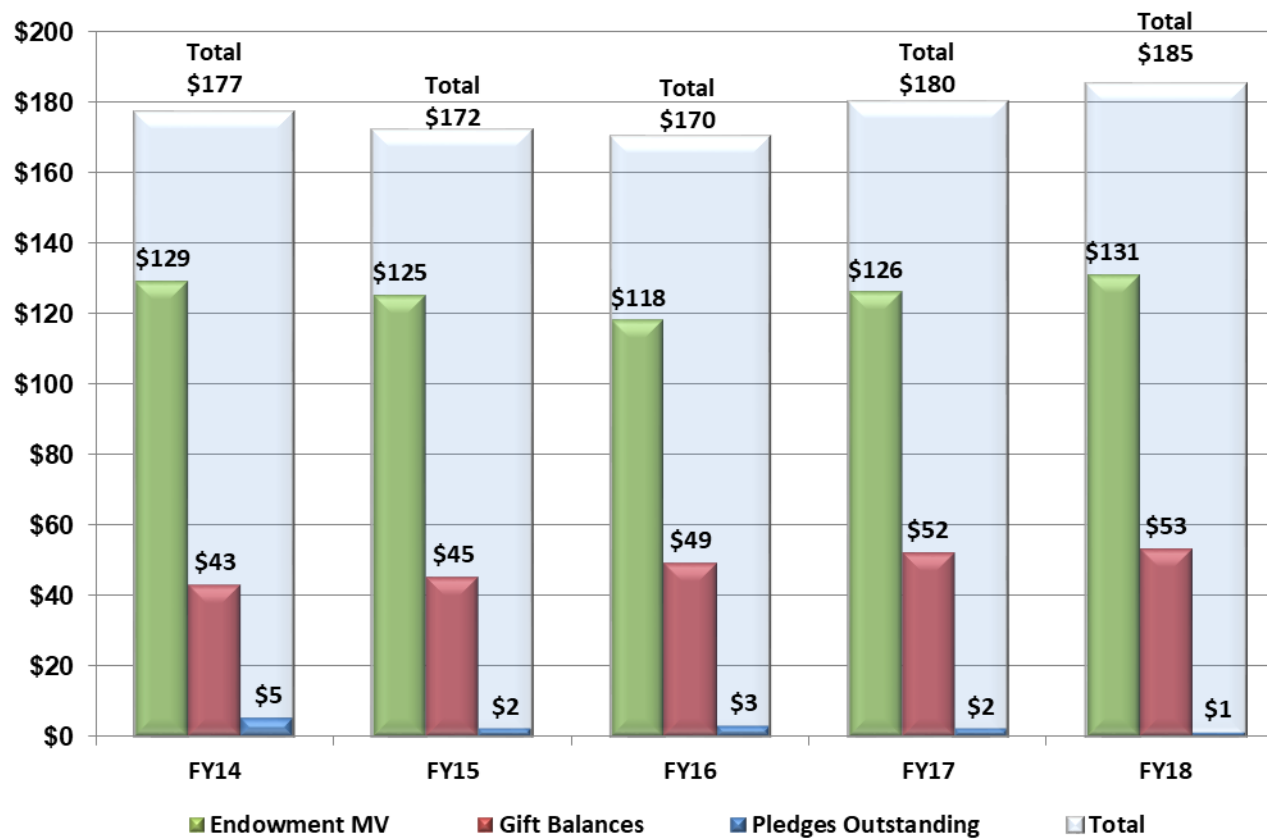
# Gifts Received by Campus

(\$ in millions)



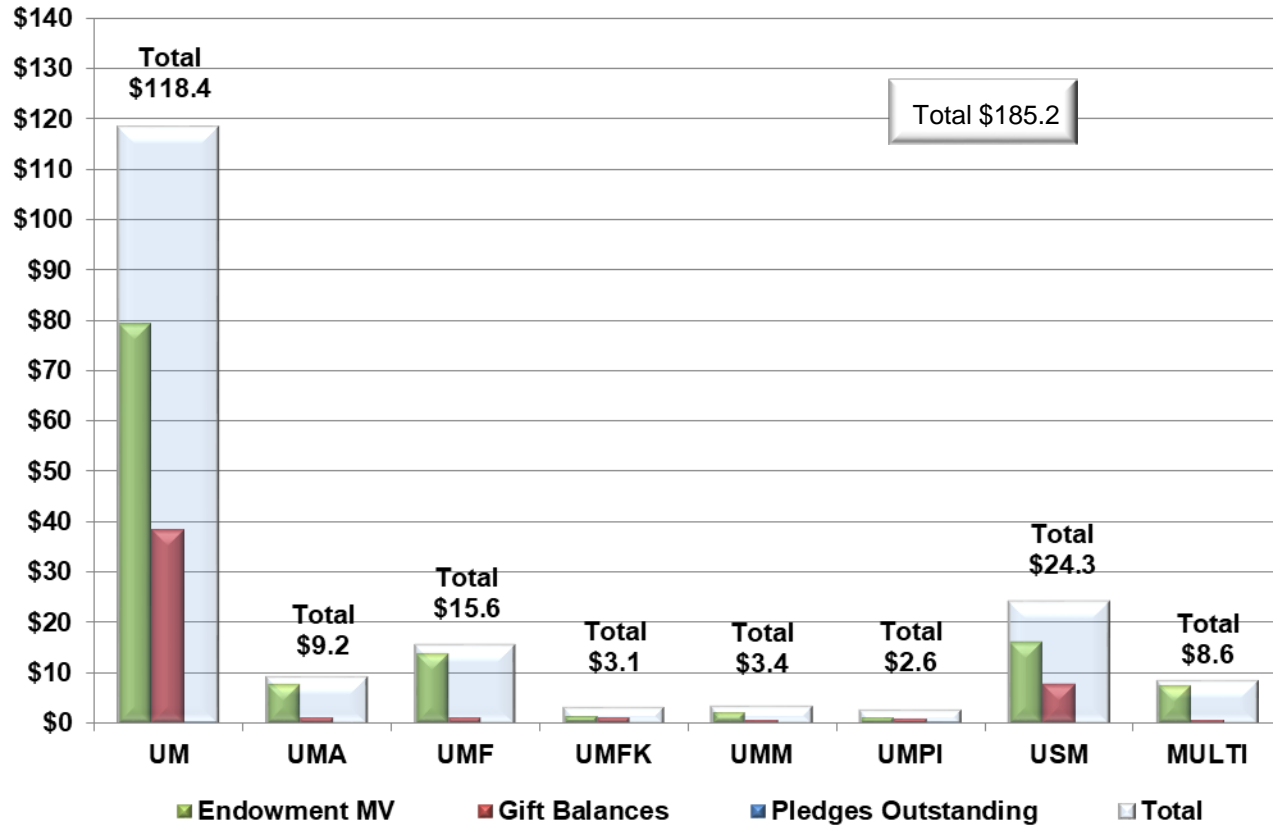
# Gift Balances as of June 30th

(\$ in millions)



# Gift Balances by Campus as of June 30, 2018

(\$ in millions)





# UMS Affiliated Fund Raising Organizations

# Gifts Received by UMS Affiliated Organizations

(\$ in thousands)

	<u>FY17</u>		<u>FY18</u>
<b>UM Affiliates</b>			
UM Alumni Association	\$ 224		\$ 209
UM Foundation	7,446	R	12,878
UM Pulp & Paper Foundation	362		419
4-H Camps at Tanglewood & Blueberry Cove	105		19
Maine 4-H Foundation	270		571
<b>UMFK Affiliates</b>			
UMFK Alumni Association	7		3
UMFK Foundation	206		165
John L. Martin Scholarship Fund	-		-
<b>UMM Alumni Association</b>			
	-		-
<b>Foundation of the University at Presque Isle</b>			
	42		1,143
<b>USM Affiliates</b>			
USM Foundation	2,353		2,982
UM Law School Foundation	1,247		782
<b>Total Gifts Received by Affiliated Organizations</b>			
	<b>\$ 12,262</b>		<b>\$ 19,171</b>

47% of FY17 gifts and 60% of FY18 gifts were from Alumni

21% of FY17 gifts and 29% of FY18 gifts were from Alumni

R Restatement of amount (\$7,580) previously reported for FY17.

# Endowment Market Values for UMS Affiliated Organizations

(\$ in millions)

	<u>FY17</u>	<u>FY18</u>
<b><i>UM Affiliates</i></b>		
UM Foundation <sup>a</sup>	\$ 203.0	\$ 221.0
UM Pulp & Paper Foundation	16.5	18.5
4-H Camps at Tanglewood & Blueberry Cove	0.3	0.3
Maine 4-H Foundation	3.2	3.6
<b><i>UMFK Affiliates</i></b>		
UMFK Foundation <sup>b</sup> *	2.1	2.3
John L. Martin Scholarship Fund*	0.1	0.1
<b><i>Foundation of the University at Presque Isle</i></b>	4.8	6.1
<b><i>USM Affiliates</i></b>		
USM Foundation*	18.1	20.3
UM Law School Foundation*	4.3	4.6
<b>Total Endowment Market Value for Affiliated Organizations</b>	<b>\$252.4</b>	<b>\$ 276.8</b>

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

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

\* Endowment included in the UMS Managed Investment Pool.

# Status of Capital Campaigns as of June 30, 2018

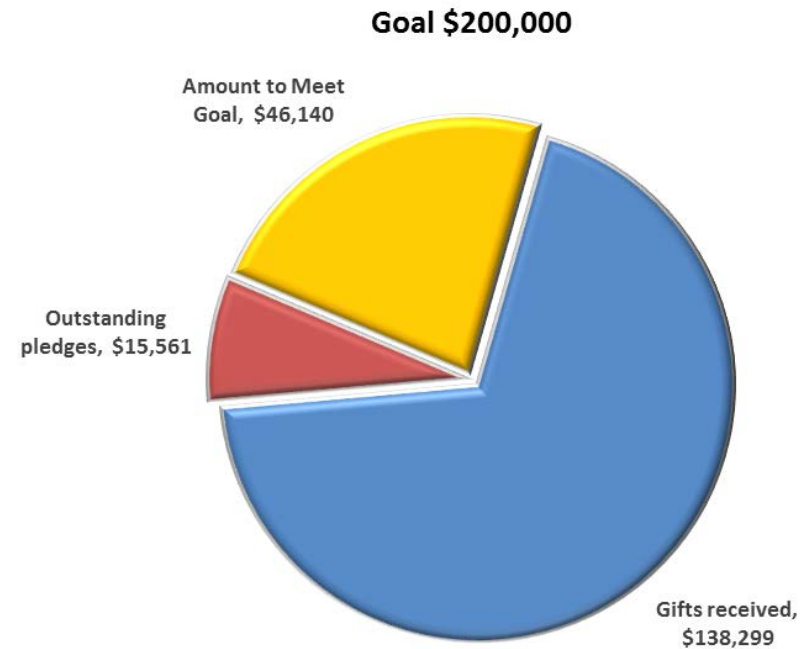
(\$ in millions)

## 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, 2018

(\$ in millions)

## 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
- Prioritization of a fundraising collaboration with Maine Center Ventures to establish the Maine Center for Graduate and Professional Studies
- A change in leadership at the USM Foundation

Working in concert with USM's President, the USM Foundation is responding to this changing landscape and redefining the strategic priorities and timing of different elements within USM's comprehensive campaign.

USM and the USM Foundation hope to present to the FFT Committee in late spring or early summer 2019 about the status, priorities, and scope of this campaign.

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, is currently in its quiet phase. A \$1 million seed gift has been received to launch the planning stage. This component is viewed as the longest-term project of an overall comprehensive campaign.
2. Promise Scholars has raised nearly \$4 million toward its \$15 million goal. Several significant asks are pending along with a significant verbal commitment.
3. The Risk Management & Insurance Program chair campaign is ongoing and has raised \$2 million toward its \$3 million goal.
4. The athletics fundraising component is not active at this time.