

FY2020-21



THE UNIVERSITY OF
NEW MEXICO
FOUNDATION

POWER OF THE PACK

The UNM Foundation: Our Stories of Impact

www.powerofthepack.org



Welcome from our CEO and President, Jeff Todd

It has been an extraordinary time for UNM and one that the entire University will not soon forget.

From our remarkable and resilient students to UNM Leadership, faculty and staff navigating uncharted territory, we should all be proud to emerge from the pandemic inspired and stronger.

We are very proud to work with donors from all over the country who are passionate and unconditional in their support of UNM students, faculty, and academic programs. In this, we are very pleased to present our new Report of Giving that we've renamed Power of the Pack, which you may remember served as our newsletter during the height of the pandemic and beyond.

We are also very proud to introduce a new online format will allow us to expand the way we convey our stories of impact and success founded in our collective strength as partners. We're excited to be capturing the many ways your donations change the lives of students. These stories are a true testament to your dedication to UNM. We simply could not do it without you. Please visit www.powerofthepack.org for more stories of impact.

Thank you for supporting UNM, and as always...Go, Lobos!

Jeff Todd
CEO and President of the UNM Foundation



UNM FOUNDATION LEADERSHIP

JEFF TODD

President and CEO
(505) 313-7667
Jeff.Todd@unmfund.org

LARRY RYAN

Vice President of University Development
(505) 313-7626
Larry.Ryan@unmfund.org

TRISH IDAROLA

Senior Associate Vice President of Digital Strategy, Services & Analytics
(505) 313-7612
Trish.Idarola@unmfund.org

KENNY STANSBURY

Chief Financial Officer
(505) 313-7633
Kenny.Stansbury@unmfund.org

WILLIAM (BILL) UHER

Vice President of Development
(505) 313-7622
Bill.Uher@unmfund.org

KRISTINE MAZZEI

Senior Associate Vice President of Central Development
(530) 219-1507
Kristine.Mazzei@unmfund.org

PATRICK (PAT) ALLEN

General Counsel
(505) 313-7605
Pat.Allen@unmfund.org

ANNETTE HAZEN

Senior Associate Vice President of Engagement & Acquisition
(505) 313-7637
Annette.Hazen@unmfund.org

GRETCHEN DOYLE

Associate Vice President of Human Resources
(505) 313-7647
Gretchen.Doyle@unmfund.org

CONSOLIDATED INVESTMENT FUND

FY 2020-21

The UNM Board of Regents has delegated authority to the UNM Foundation Investment Committee to oversee and manage the endowment assets of the University and the Foundation. The pooled assets are combined for investment purposes and operated as a unitized pool known as the Consolidated Investment Fund (CIF). The CIF is managed in accordance with the Consolidated Investment Fund Investment Policy, which is approved by both the UNM Foundation Board of Trustees and the UNM Board of Regents.

CIF investments are invested for the long-term using a diversified approach, with the principal goal of maximizing the return at a commensurate and acceptable level of risk, to benefit UNM. Investment strategy is guided by the concept of complementary managers that are responsible for specific asset categories and management styles in a diversified portfolio (see "CIF Asset Allocation" chart).

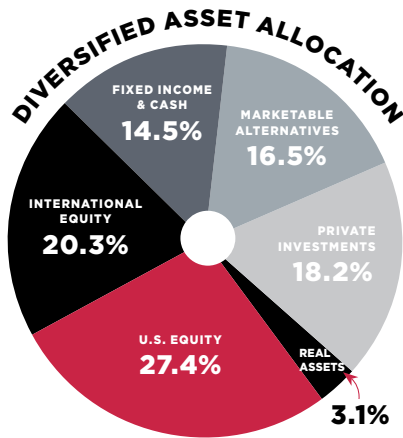
The CIF finished the year with a market value of approximately \$580.3 million, compared to \$444.6 million a year ago, and an investment return of 31.3 percent.

In addition to the customary investment management expenses, a development funding allocation (DFA) of 1.85% is assessed against each participating fund to assist with operational expenses.

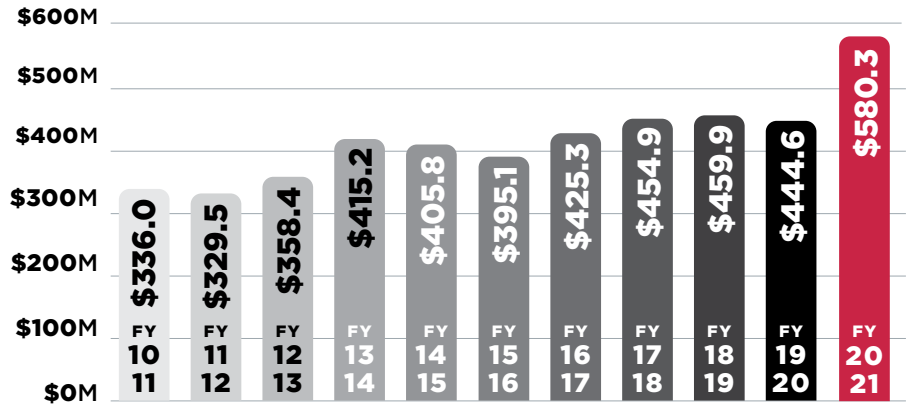
CIF PERFORMANCE

As of June 30, 2021

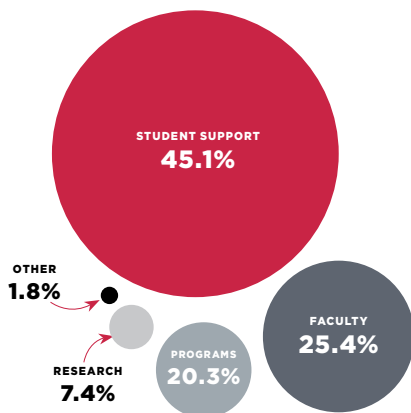
FY 2020-21	31.3%
3-YEAR	11.0%
5-YEAR	10.6%
10-YEAR	8.0%



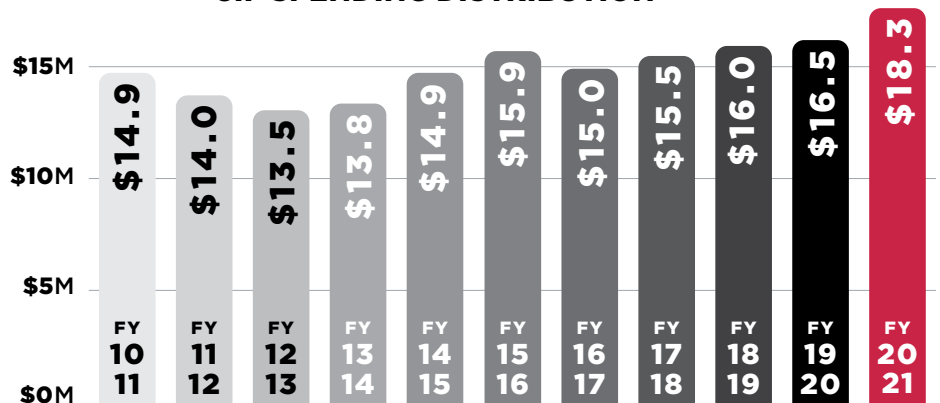
CIF MARKET VALUE



CIF SPENDING DISTRIBUTION BY DONOR-DESIGNATED PURPOSE



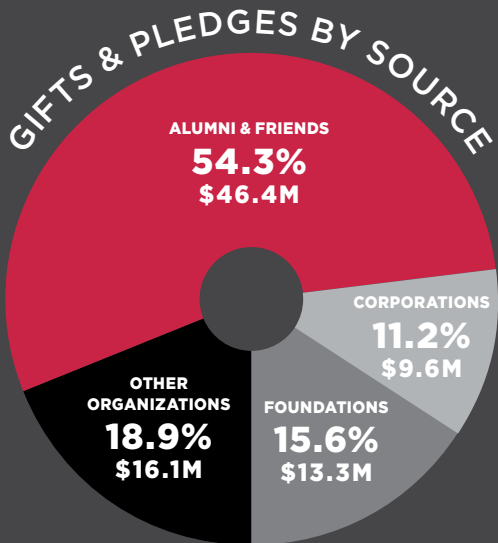
CIF SPENDING DISTRIBUTION



PRIVATE GIVING

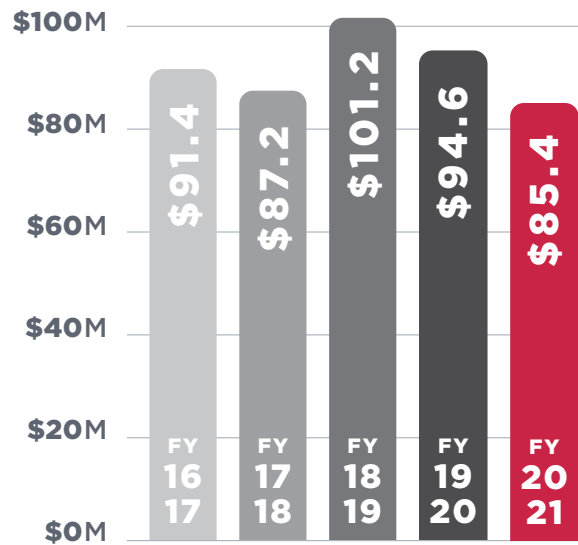
FY 2020-21

More than \$85 million in private support was given to The University of New Mexico during the July 1, 2020 - June 30, 2021 fiscal year. Private support includes gifts and pledges received for the benefit of UNM's students, schools, colleges, departments and programs. Along with you, more than 8,800 donors provided more than 26,000 gifts that support UNM's mission of student and faculty success, world-class research and exceptional patient care at clinics and hospitals. Your generosity builds the future at The University of New Mexico. We are grateful for your trust, and we thank you for your support.

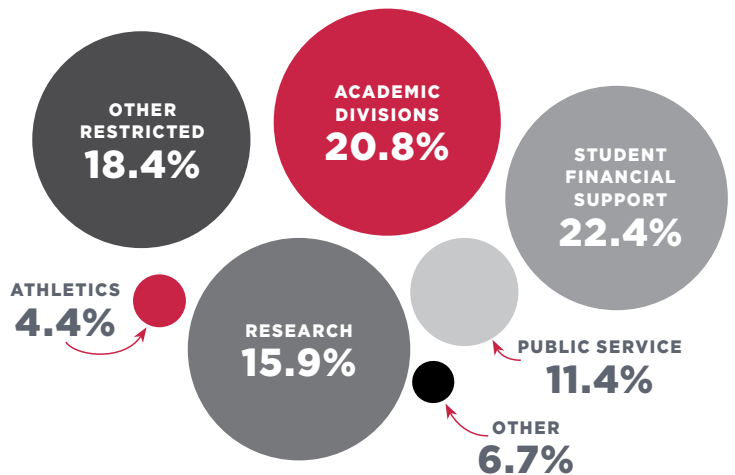


TOTAL \$85,375,521

PRIVATE SUPPORT TOTALS



GIFTS & PLEDGES BY PURPOSE DONOR RESTRICTIONS



HOW WE REPORT YOUR GIFTS

FY 2020-2021

The UNM Foundation complies with defined standards to report private gifts.

The UNM Foundation Annual Report details the total effort of the UNM community in engaging private donors. **Based on UNM Foundation counting standards**, qualifying bequests, cash and in-kind gifts donated directly to UNM-affiliated units, as well as pledges meeting the criteria, are counted and recognized in the annual total. Our audited financial statements report gifts in accordance with **Generally Accepted Accounting Principles**. Unlike campaign reporting, gifts of bequests, cash and in-kind gifts donated directly to UNM-affiliated units, as well as pledges outside the criteria for Generally Accepted Accounting Principles, are omitted.

Given their differing objectives, each of these standards reports the gifts received by UNM differently. Campaign reports are distributed monthly and through this annual Report of Giving. Our audited financial statements are available on our website at unmfund.org. We welcome your questions at (505) 313-7600.

Gift Commitments to UNM

FY 2020-2021

REPORTED ON THE UNM FOUNDATION'S AUDITED FINANCIAL STATEMENTS	
Cash	\$36,449,333
In-Kind Gifts	\$209,830
Pledges	\$2,152,000
NOT REPORTED ON FINANCIAL STATEMENTS BUT RECOGNIZED AS CAMPAIGN GIFTS	
Cash	\$18,239,509
In-Kind Gifts	\$2,004,439
Pledges and Estate Commitments	\$26,320,410
TOTAL GIFT COMMITMENTS	\$85,375,521

GIFTS FOR UNM'S CURRENT USE	
Cash	\$38,908,534
In-Kind Gifts	\$2,355,160
TOTAL GIFTS FOR UNM'S CURRENT USE	\$41,263,694
GIFTS FOR UNM'S FUTURE	
Cash Gifts to UNM's Endowment	\$15,639,417
Pledges and Estate Commitments	\$28,472,410
TOTAL GIFTS FOR UNM'S FUTURE	\$44,111,827
TOTAL GIFT COMMITMENTS	\$85,375,521

FY 2020-2021 AT A GLANCE

Total number of donors **8,826**

Number of individual donors
7,861

Number of corporation and foundation donors
770

Number of first-time donors **2,187**

Number of donors per highest giving levels:

\$1 MILLION +	25
\$500,000-\$999,999	19
\$100,000-\$499,999	83
\$50,000-\$99,999	57

ABOUT OUR DONORS

Donors to The University of New Mexico, like you, come from across the state, country, and the world. Our students, staff, faculty, researchers, and patients, are grateful to every donor for every gift. We greatly appreciate your generosity and support of our Lobo community.

PRESIDENTIAL SCHOLARSHIP PROGRAM

Many of New Mexico's highest achieving and most committed high school graduates attend UNM each year due to the UNM Presidential Scholarship. These scholars earned the right to be called Presidential Scholars through their academic performance and community service. They enrich New Mexico and exemplify student success as Lobos on the UNM campus throughout their college careers and long after they graduate. With a gift of \$2,600 each year, you may join our program as a full Sponsor of a Presidential Scholar. UNM leverages your donation more than 3 to 1 to provide an award of \$9,800 that covers a student's tuition, fees, and books and is renewable for four years. As a Sponsor, you are matched with a Scholar, attend special invitation-only annual events,

and have an opportunity to make a personal connection with the student whose life you are helping to change. Alternately, you may make a gift of any size to the UNM Presidential Scholarship Program and "share a Scholar" with other generous donors. These gifts make a difference annually by providing many additional Presidential Scholarships. For giving in perpetuity, an investment of \$50,000 or more establishes an endowed Presidential Scholarship, which can bear the donor's name or the name of a living or deceased loved one, colleague, or mentor. You may create an endowment with a one-time gift or pay over three years or less. For more information, please contact Presidential Scholarship Program Director Terry Mulert at Terry.Mulert@unmfund.org or (505) 313-7679.



PRESIDENTIAL SCHOLARSHIP PROGRAM	
4,816 Scholars since 1976	
393 FY 2020-2021 Scholars	
92 NM high schools represented	
\$11.7M In endowments	
Scholarships	
94 Endowment	159 Annual
44 New scholarships FY 2020-2021	PSP alumni Sponsors 59

NEW HORIZONS SOCIETY

The UNM Foundation created the New Horizons Society to recognize individuals and families who have included The University of New Mexico in their estate plans. Members are honored at an annual event that celebrates the impact of estate gifts on University programs, students, and faculty. If you name The UNM Foundation as the beneficiary of an estate gift of any size, we want to welcome you as a New Horizons Society member. Estate gifts include a provision in a will or trust, a beneficiary designation (on a bank account, retirement plan, or life insurance policy), or any arrangement providing lifetime income to the donor. For more information, please contact Associate Vice President of Planned Giving Bonnie McLeskey at Bonnie.McLeskey@unmfund.org or (505) 313-7610.

NEW HORIZONS SOCIETY

Total number of NHS members

655

Total number of new members in FY 2020-2021

62

New estate commitments in FY 2020-2021

\$24,809,197

Received from estates in FY 2020-2021

\$13,441,555



TOM L. POPEJOY SOCIETY

Founded in 1982, the Tom L. Popejoy Society recognizes philanthropic leaders whose cumulative giving throughout their lifetimes exceeds \$50,000. This esteemed group of donors has grown to more than 1,400 members whose philanthropy supports virtually all aspects of The University of New Mexico. As the first native New Mexican to hold the position of president of UNM, Tom L. Popejoy left a far-reaching legacy. Popejoy's 20 years as president (1948-1968), a time fondly known as the Popejoy era, capped a career that made him a UNM legend. During his tenure, the campus was greatly expanded to include the School of Medicine, KNME-TV, Jonson Gallery, the first Bratton Hall, and The Pit, to name a few, all of which helped shape the UNM footprint today. We are grateful to those who echo President Popejoy's passion and commitment to the University. Thanks to Tom L. Popejoy Society members, the most significant impact on student success and opportunity, faculty support and research, campus programs, and capital projects and facilities can be achieved. For more information on this prestigious society, please contact Donor Relations Director Jill Slaby at Jill.Slaby@unmfund.org or (505) 313-7650.

TOM L. POPEJOY SOCIETY

Established in

1982

Charter members

30

82

Total number of new members in FY 2020-2021

1,516

Total living members (including anonymous)

\$8M

Total amount of donations represented during FY 2020-2021

Please visit www.powerofthepack.org for more stories of impact

