

FY2021-22



POWER OF THE PACK

The UNM Foundation: Our Stories of Impact

www.powerofthepack.org

Welcome from our CEO and President, Jeff Todd

This year has been one of extraordinary achievements for The University of New Mexico and the UNM Foundation. Together, we celebrate an unprecedented year of giving. We often say that the Foundation empowers UNM by building relationships. This year we empowered ourselves by building from within, and the results are astounding.

As we closed the books on Fiscal Year 2022, we have received a UNM record of \$125,859,534 in gifts and commitments. This represents 143% of our goal and the generosity of friends, faculty, staff, and alums of UNM through 26,966 contributions. This sum also represents a tremendous collaborative effort, professionalism, persistence, and faith in UNM. Most importantly, it indicates our donors' trust and confidence in our great University's essential work. As you will see, we have many wonderful stories and highlights from this year.

UNM is on the brink of a new era driven by the understanding that we can achieve much more together as one University. All parts of the University feel this change; a dynamic partnership with passionate and visionary donors is essential to our success. Philanthropy can fuel UNM's aspirations by making what was previously impossible possible.

Warm Regards,

Jeff Todd
CEO and President of the UNM Foundation



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CONSOLIDATED INVESTMENT FUND

FY 2021-22

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 who are responsible for specific asset categories and management styles in a diversified portfolio (see "Diversified Asset Allocation" chart).

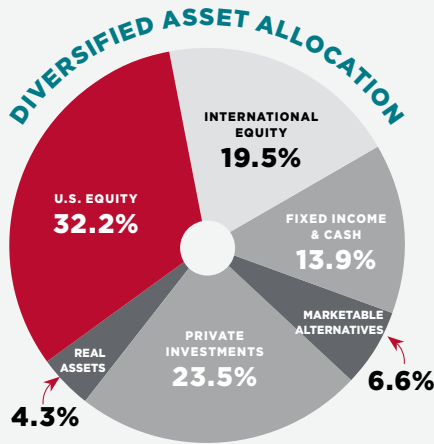
The CIF finished the year with a market value of approximately \$604.0 million, compared to \$580.3 million a year ago, and an investment return of -6.0 percent.

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.

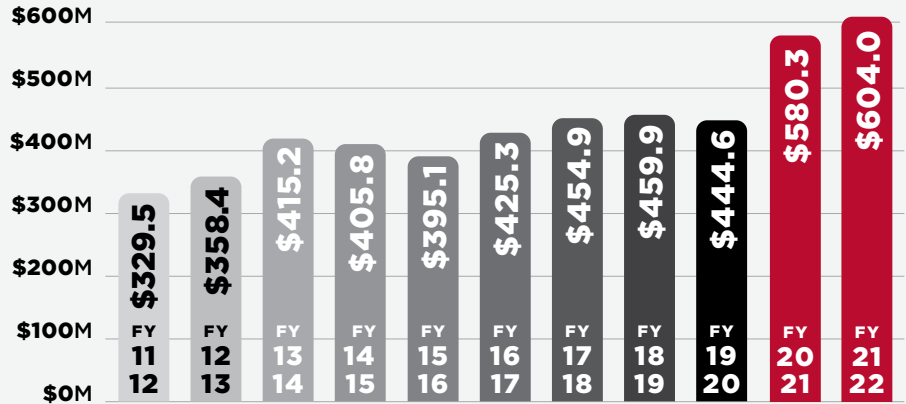
CIF PERFORMANCE

As of June 30, 2022

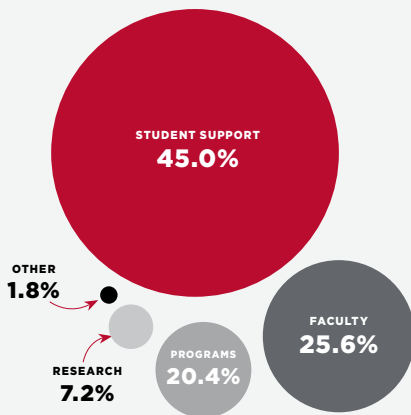
	UNM CIF	BENCHMARK
2020-22	-6.0%	-6.4%
3-YEAR	7.3%	7.4%
5-YEAR	6.8%	7.2%
10-YEAR	7.2%	7.4%



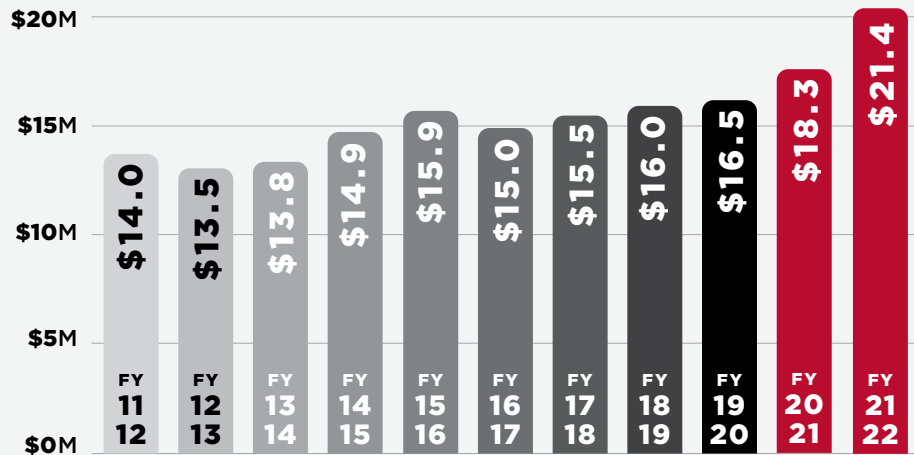
CIF MARKET VALUE



CIF SPENDING DISTRIBUTION BY DONOR-DESIGNATED PURPOSE



CIF SPENDING DISTRIBUTION



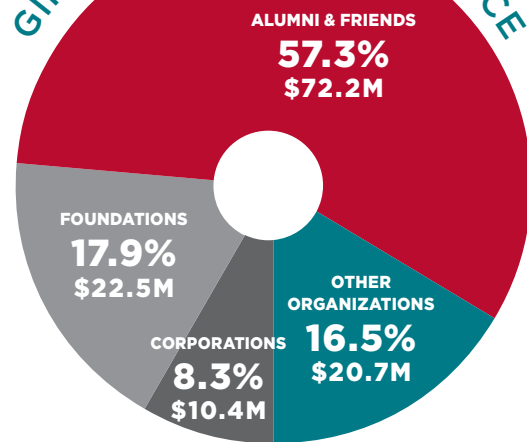
PRIVATE GIVING

FY 2021-22

More than \$125 million in private support was given to The University of New Mexico during the July 1, 2021 – June 30, 2022 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 9,600 donors provided almost 27,000 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.

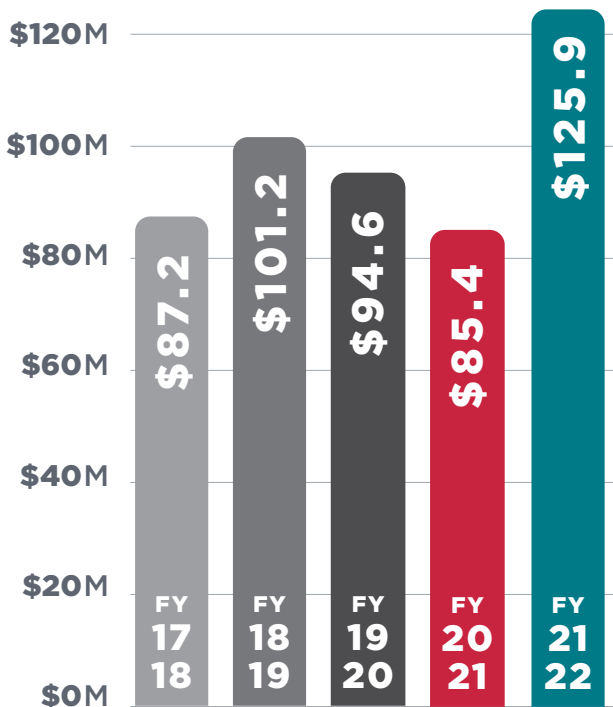


GIFTS & PLEDGES BY SOURCE



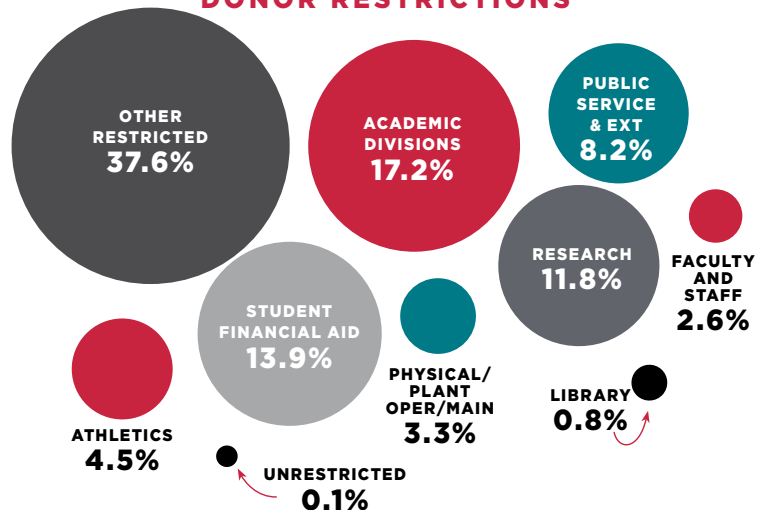
TOTAL \$125,859,534

PRIVATE SUPPORT TOTALS



GIFTS & PLEDGES BY PURPOSE

DONOR RESTRICTIONS



HOW WE REPORT YOUR GIFTS

FY 2021-2022

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 fundraising 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. Fundraising reports are distributed weekly 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 2021-2022

REPORTED ON THE UNM FOUNDATION'S AUDITED FINANCIAL STATEMENTS	
Cash	\$65,083,106
In-Kind Gifts	\$66,330
Pledges	\$1,963,103
NOT REPORTED ON FINANCIAL STATEMENTS BUT RECOGNIZED AS CAMPAIGN GIFTS	
Cash	\$29,777,033
In-Kind Gifts	\$1,429,439
Pledges and Estate Commitments	\$27,540,523
TOTAL GIFT COMMITMENTS	\$125,859,534

GIFTS FOR UNM'S CURRENT USE	
Cash	\$79,828,682
In-Kind Gifts	\$1,495,769
TOTAL GIFTS FOR UNM'S CURRENT USE	\$81,324,451
GIFTS FOR UNM'S FUTURE	
Cash Gifts to UNM's Endowment	\$15,031,457
Pledges and Estate Commitments	\$29,503,626
TOTAL GIFTS FOR UNM'S FUTURE	\$44,535,083
TOTAL GIFT COMMITMENTS	\$125,859,534

FY 2021-2022 AT A GLANCE

Total number of donors **9,624**

Number of individual donors
8,483

Number of corporation and foundation donors
894

Number of first-time donors **2,623**

Number of donors per highest giving levels:

\$1 MILLION +	30
\$500,000-\$999,999	13
\$100,000-\$499,999	90
\$50,000-\$99,999	74

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.

GIVING PROGRAMS

PRESIDENTIAL SCHOLARSHIP PROGRAM

Many of New Mexico's highest achieving and most committed high school graduates attend UNM each year thanks to their 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 an annual gift of \$2,600, you will create your very own named Presidential Scholarship. This award is currently valued at over \$13,000 with the help of our leveraged funds, and it covers a Scholar's tuition, fees, books and more. As a Sponsor, you are matched with a Presidential Scholar, attend special invitation-only 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 by providing many additional Presidential Scholarships. For giving in perpetuity, an investment of \$75,000 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

4,884

Scholars since 1976

322

FY 2021-2022
Scholars

81

NM high schools
represented

\$11.3M

In endowments

Scholarships

102

Endowment

177

Annual

38

New
scholarships
FY 2021-2022

PSP alumni
Sponsors

59

NEW HORIZONS SOCIETY

The UNM Foundation created the New Horizons Society in 1998 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 UNM's students, faculty, patients and programs. 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 financial 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

665

Total number of new members in FY 2021-2022

41

New estate commitments in FY 2021-2022

\$21,177,450

Received from estates in FY 2021-2022*

\$3,661,146

**Amount received from estates not previously counted by the Foundation.*



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 1,644 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 Engagement Director Jill Slaby at Jill.Slaby@unmfund.org or (505)313-7650.

TOM L. POPEJOY SOCIETY

Established in

1982

Charter members

32

133

Total number of new members in FY 2020-2021

1,629

Total living members (including anonymous)

\$11.3M

Total amount of donations represented during FY 2021-2022

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

