

# POWER OF **THE PACK**



# WELCOME FROM OUR CEO AND PRESIDENT, JEFF TODD



Friends of UNM and The UNM Foundation,

I am thrilled to connect with you as we conclude another extraordinary year of fundraising and celebrate our monumental achievements. Philanthropy transcends mere financial contributions; it forges unity, nurtures friendships, and fortifies the ties that bind us. It's also about the inspiring narratives that move us to be part of something profound and enduring, connecting donors with their passions and guiding their contributions to maximize their impact.

We take great pride in announcing that we have not only met but surpassed our fundraising goals, amassing an impressive total exceeding \$101 million in gifts and pledges. This marks the second consecutive year we've achieved this remarkable feat for UNM. Our success stands as a testament to the generous donors whose investments mirror their unwavering belief in the mission of UNM.

This year, we commemorated UNM's founding in February 1889 with a groundbreaking fundraising initiative, UNM Big Give. Over 1,889 minutes that commenced on February 28, a staggering 2,517 donors rallied together to contribute more than \$802,000 to UNM programs. UNM Big Give sparked collaboration among all UNM campuses, UNM Health, UNM Athletics, and the UNM Foundation, generating excitement and urgency among alumni, faculty, staff, students, and the broader community. It also marked an exhilarating chapter for the Foundation as we endeavor to establish fresh avenues for donor engagement, catering to diverse backgrounds. I'm delighted to inform you that UNM Big Give 2024 preparations are underway.

We find ourselves amidst an electrifying and transformative phase as we conclude the second year of the quiet phase of our next comprehensive campaign, which bolsters the University's strategic plan, UNM 2040. Thus far, we've raised more than \$200 million. Galvanized by UNM's vision of becoming a global leader in unlocking human potential, addressing pressing community challenges, and championing the power of diversity, we remain resolutely focused on this overarching mission.

Thank you for your steadfast support and unwavering commitment to The University of New Mexico. Together, we are making an enduring impact and shaping a brighter future for our University and the communities we serve.

**With Gratitude,**  
**Jeff Todd**  
**CEO & President | UNM Foundation**

## UNM FOUNDATION LEADERSHIP

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# CONSOLIDATED INVESTMENT FUND

FY 2022-23

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 "Diversified Asset Allocation" chart).

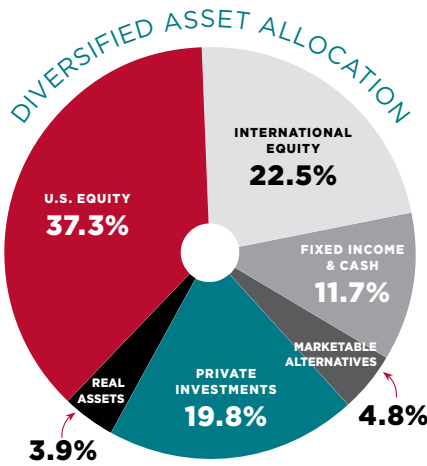
The CIF finished the year with a market value of approximately \$713.9 million, compared to \$604.0 million a year ago, and an investment return of 9.4 percent.

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.

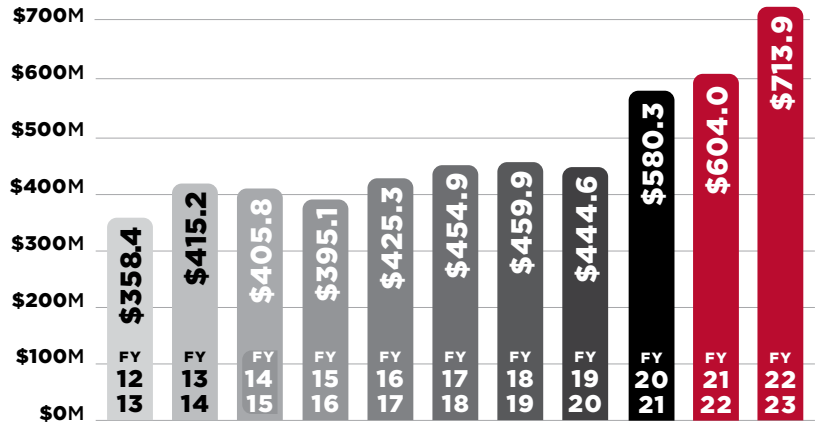
## CIF PERFORMANCE

As of June 30, 2023

	UNM CIF	BENCHMARK
<b>2022-23</b>	<b>9.4%</b>	<b>9.9%</b>
<b>3-YEAR</b>	<b>10.8%</b>	<b>10.7%</b>
<b>5-YEAR</b>	<b>7.2%</b>	<b>7.4%</b>
<b>10-YEAR</b>	<b>7.1%</b>	<b>7.3%</b>

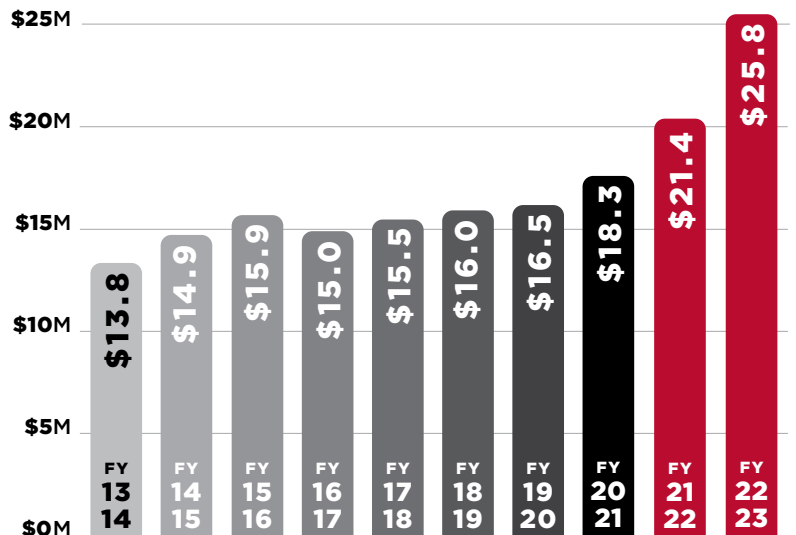
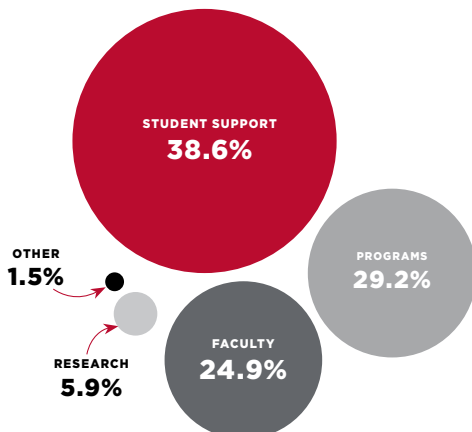


## CIF MARKET VALUE



## CIF SPENDING DISTRIBUTION

### CIF SPENDING DISTRIBUTION BY DONOR-DESIGNATED PURPOSE



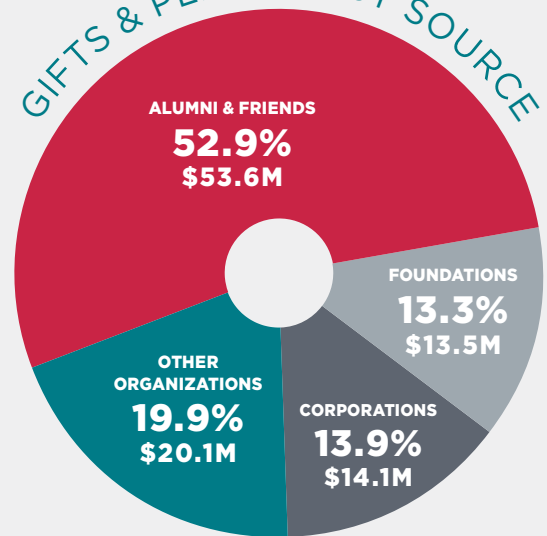
# PRIVATE GIVING

## FY 2022-23

More than \$101 million in private support was given to The University of New Mexico during the July 1, 2022 – June 30, 2023 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 over 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.

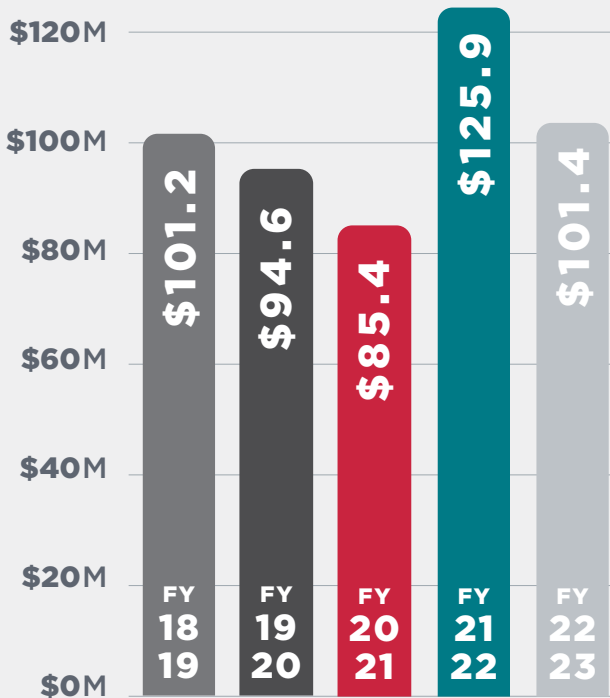


### GIFTS & PLEDGES BY SOURCE

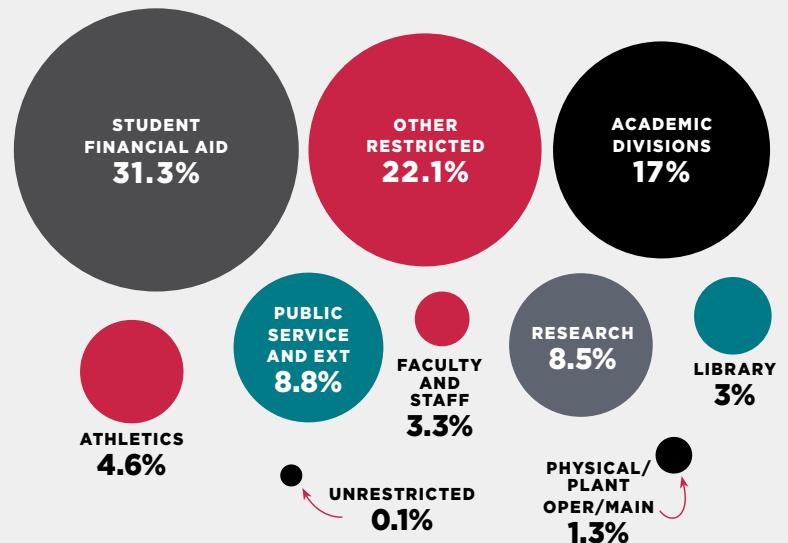


**TOTAL \$101,380,573**

### PRIVATE SUPPORT TOTALS



### GIFTS & PLEDGES BY PURPOSE DONOR RESTRICTIONS



# HOW WE REPORT YOUR GIFTS

FY 2022-23

The UNM Foundation (UNMF) complies with various standards when reporting private gifts, depending on the purpose of the report and the requirements of the requesting organization. We welcome your questions at (505) 313-7600.

This UNMF Annual Report of Giving reports the total effort of the UNM community in engaging private donors. **Based on UNM Foundation campaign 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.

The UNMF's audited financial statements report your gifts in accordance with **Generally Accepted Accounting Principles (GAAP)**. 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 GAAP, 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 [www.unmfund.org](http://www.unmfund.org).

## Gift Commitments to UNM

FY 2022-23

REPORTED ON THE UNM FOUNDATION'S AUDITED FINANCIAL STATEMENTS	
Cash	\$46,511,300
Pledges	\$957,579
NOT REPORTED ON FINANCIAL STATEMENTS BUT RECOGNIZED AS CAMPAIGN GIFTS	
Cash	\$10,749,370
In-Kind Gifts	\$1,633,158
Pledges and Testamentary Gifts	\$41,529,166
<b>TOTAL GIFT COMMITMENTS</b>	<b>\$101,380,573</b>
GIFTS FOR UNM'S CURRENT USE	
Cash	\$30,993,351
In-Kind Gifts	\$1,633,158
<b>TOTAL GIFTS FOR UNM'S CURRENT USE</b>	<b>\$32,626,509</b>
GIFTS FOR UNM'S FUTURE	
Cash Gifts to UNM's Endowment	\$26,267,319
Pledges and Estate Commitments	\$42,486,745
<b>TOTAL GIFTS FOR UNM'S FUTURE</b>	<b>\$68,754,064</b>
<b>TOTAL GIFT COMMITMENTS</b>	<b>\$101,380,573</b>

### FY 2022-23 AT A GLANCE

Total number of donors **9,623**

Number of individual donors

**8,488**

Number of corporation and foundation donors

**1,135**

Number of first-time donors

**2,652**

Number of donors per highest giving levels:

\$1 MILLION +

**24**

\$500,000-\$999,999

**24**

\$100,000-\$499,999

**83**

\$50,000-\$99,999

**80**

## 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 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 \$3,200 (effective 1.15.24), you will create your very own named Presidential Scholarship. This award is currently valued at over \$14,000 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](mailto:Terry.Mulert@unmfund.org) or (505) 313-7679.



## PRESIDENTIAL SCHOLARSHIP PROGRAM

**5,015**

Scholars since 1976

**323**

FY 2022-23  
Scholars

**200+**

NM high schools  
represented since 1976

**\$12M**

In endowments

**31**

New scholarships  
FY 2022-23

**798**

Total PSP  
Alumni  
Donors

**\$45M**

Total  
Gifts  
to PSP  
Since 1976

# 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. If you have chosen to support The University of New Mexico with an estate gift of any size, we want to thank you, understand your wishes so they can be fulfilled, and welcome you to join the New Horizons Society. Members are honored at events that celebrate the impact of estate gifts on UNM's students, faculty, patients and programs.

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 gift providing lifetime income to the donor or their chosen beneficiaries. For more information, please contact Associate Vice President of Planned Giving Bonnie McLeskey at [Bonnie.McLeskey@unmfund.org](mailto:Bonnie.McLeskey@unmfund.org) or (505) 313-7610.

## NEW HORIZONS SOCIETY

Total number of NHS members

**669**

Total number of new members in FY 2022-23

**41**

New estate commitments in FY 2022-23

**\$34,230,526**

Received from estates in FY 2022-23\*

**\$7,079,561**

*\*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 Charlotte Wall-Smith of Donor Engagement at [charlotte.wall-smith@unmfund.org](mailto:charlotte.wall-smith@unmfund.org) or (505) 313-7652.

## TOM L. POPEJOY SOCIETY

Established in

**1982**

**31** Living Charter members

**139** Total number of new members in FY 2022-23

**1,729**

Total living members (including anonymous)

**\$7.96M**

Total amount of donations represented during FY 2022-23

[www.powerofthepack.org](http://www.powerofthepack.org)



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