

# ANNUAL REPORT

## FISCAL YEAR 2020



UNIVERSITY OF  
**MONTANA**  
FOUNDATION

In fiscal year 2020,  
**11,282 donors** gave  
**\$54.8 million** in support  
of the University of Montana.



**Since 1950, the University of Montana Foundation  
has delivered on its mission to inspire philanthropic  
support to enhance excellence and opportunity  
at the University of Montana.**

**THE LIVES WE CHANGE WILL  
CHANGE THE WORLD**

The University of Montana Foundation is an independent, nonprofit organization that serves UM by managing private fundraising efforts, donations and investment of endowed gifts. Governed by a Board of Trustees, the UM Foundation operates under an agreement with UM that is reviewed and approved by the Montana University System Board of Regents.



## DEAR FRIENDS,

Every year, private support for the University of Montana continues to be critically important. Your gifts to the UM Foundation enable significant opportunities for innovation, growth and excellence for our students, our faculty and our communities.

This year we have been reminded that the trajectory of our students' lives greatly depends on our collective commitment to surround them with the support they need to succeed.

We kicked off the year with excitement and momentum leading into the final months of Campaign Montana, and it concluded amid significant disruption at UM and across our nation because of the pandemic. What we know for sure is that our UM giving community has remained as committed as ever. The goals and dreams of our students have remained a focus of your concerns and your charitable giving. Thank you.

As the pandemic emerged so many of you asked what you could do to help struggling students. Hundreds of donors came together to give close to \$79,000 (and counting) designated for the Emergency Student Support Fund, providing critical resources for students facing hardships.

Thanks to your continued generosity, the UM Foundation facilitated \$6.3 million in privately funded scholarships as part of the \$20.4 million provided across campus for students, faculty, program and facilities.

We are deeply grateful for your ongoing support of students and the vital work that takes place at UM.

We wish you and your family good health and happiness always.

*Cindy Williams*

Cindy Williams  
President and CEO

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# 11,282 donors gave \$54.8 million

in support of the University of Montana.

## SOURCES OF PRIVATE GIFTS

**53%**

Alumni

**33%**

Friends

**14%**

Corporations

Parents

Foundations

Other

## PRIVATE GIFTS AND GRANTS

**\$40.4M**

Total received by the  
UM Foundation

**\$14.4M**

Total received  
directly by UM

## DONORS GAVE TO SUPPORT

people, programs, and facilities  
across campus



**\$22.7M** for  
academic and  
institutional support



**\$8.9M** for  
scholarships and  
student support



**\$8.7M**  
for facilities



# DONORS PUSH PAST CAMPAIGN MONTANA GOAL

When the UM Foundation publicly launched the most ambitious fundraising campaign in UM history – *Campaign Montana – Think Big. Be Bold.* – it announced a goal of inspiring \$400 million in philanthropic giving through 2020 to benefit every student, college, school and program.

Donors exceeded that goal in late-September 2019, nearly a year before the campaign concluded.

Early this year, UM's generous donors provided a groundswell of support for priorities across campus and built great momentum for the campaign's final year. At our annual event honoring members of the President's Club giving society on Oct. 3, the UM Foundation announced more than \$7 million in transformational gifts.

- ▶ A \$5 million gift from the Terry and Patt Payne Family will enable Montana Museum of Art and Culture to bring its vast collection of thousands of compelling works of art from campus storage into public view and engagement.
- ▶ Dennis and Gretchen Eck pledged \$1.25 million to support the S.E.A. Change Initiative for UM Students, a new program that prepares women across disciplines to become next-generation leaders whose contributions will influence broad societal change.
- ▶ University of Montana alumni Sam and Julie Baldrige donated \$1 million to help fund an expansion of UM's Clinical Psychology Center, allowing it to serve up to four times more Western Montana residents in need of mental health care.

As we forge ahead together to continue helping UM realize the full potential of its mission, Campaign Montana is demonstration of the incredible change we can create when this community comes together.



# \$216M

Endowment balance  
at fiscal year end.

The endowment consists of investments managed by the UM Foundation in the long-term investment portfolio and trusts established for the benefit of the University.

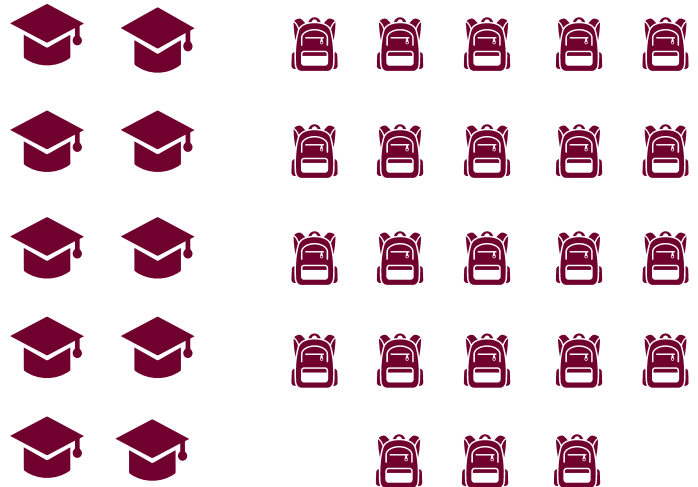
# 1,113

Endowed funds under  
the UM Foundation's  
management.

# 33

New endowed funds  
were created by  
donors.

## In fiscal year 2020, new endowed funds:



**10**  
will support  
programs

**23**  
will support  
scholarships

# STUDENT SUCCESS REMAINS TOP PRIORITY. GIVING COMMUNITY MAKES ALL THE DIFFERENCE THIS YEAR.

At the start of the COVID-19 pandemic, your gifts to support college, school and program Impact Funds and unrestricted scholarships allowed UM to adapt instruction and services with flexibility and made a life-changing difference for students experiencing financial hardship.

For UM's most vulnerable students, the financial pressure of a broken laptop, limited WI-FI access or a rent increase might mean dropping out of school. Nothing has exposed this reality like the COVID-19 pandemic, which has challenged some students to meet even basic needs.

In April 2020, the UM Emergency Student Support Fund was launched by the UM Foundation and the UM Office for Student Success to help enrolled students by covering essential needs like housing, medical and dental bills, and transportation.

**From UM spring break to June 2020, over 100 students benefited from the generosity of alumni and friends who donated close to \$79,000 to the emergency fund.**

Many donors have stepped up to make an immediate difference for these students in 2020 — proof that not even a global pandemic can dampen the UM spirit of generosity.



The UM Foundation provided  
**\$20.4** million in support to UM.



\$10.5 million in  
academic and  
institutional  
programs



\$6.3 million in  
scholarships and  
awards



\$3.6 million in  
facilities

**YOUR GENEROUS GIFTS  
TRANSFORM LIVES**



# THE BIG GIVE

## UM'S DAY OF GIVING

In April 2020, the UM Foundation launched a new annual fundraising initiative – THE BIG GIVE.

Generations of Grizzlies and UM friends united in this collective online effort to help students and to support other areas of need across campus.

This year, UM supporters gave \$96,736 to the UM Foundation for immediate distribution to campus.





The University of Montana Foundation inspires philanthropic support to enhance excellence and opportunity at the University of Montana.

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