

September 2026 Advancement Committee

Schedule

Wednesday, September 2, 2026 9:00 AM — 9:30 AM CDT

Organizer

Colton Cockrum

Agenda

1. Call to Order and Opening Remarks Presented by William E. Orgel	1
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2. Roll Call & Declaration of Quorum Presented by William E. Orgel	2
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3. Approval of Advancement Committee Meeting Minutes from March 4, 2026 For Approval - Presented by William E. Orgel	3
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6. Adjournment Presented by William E. Orgel	18
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1. Call to Order and Opening Remarks

Presented by William E. Orgel

2. Roll Call & Declaration of Quorum

Presented by William E. Orgel

3. Approval of Advancement Committee Meeting Minutes from March 4, 2026

For Approval

Presented by William E. Orgel

**University of Memphis Board of Trustees
Advancement Committee Meeting
March 4, 2026**

Meeting Minutes

Agenda Item 1: Call to Order and Opening Remarks

Chairman Carter called the meeting to order and welcomed everyone to the Advancement Committee meeting. He made opening remarks stating that as the newly appointed Chairman of the Board of Trustees, he will be handing off his duties as Chairman of the Advancement Committee. He further stated that the Advancement team is an extraordinary group of professionals and individuals who have made tremendous progress this year.

Agenda Item 2: Roll Call and Declaration of Quorum

Chairman Carter requested a roll call. Secretary Cockrum called the roll. Trustees Carter, Edwards, Keeney, Orgel, and North were in attendance. Trustee Ellison was not in attendance. Secretary Cockrum declared a quorum.

Agenda Item 3: Approval of Advancement Meeting Minutes from September 3, 2025

Chairman Carter called for a motion to approve the meeting minutes from September 3, 2025. There was a motion and a second to approve, and Secretary Cockrum called a voice vote. All trustees on the committee voted to approve the minutes, no one opposed. The meeting minutes were approved.

Agenda Item 4: Advancement Update

Chairman Carter recognized Dr. Tara Jones, Senior Vice President for Advancement and UofM Foundation. Dr. Jones stated that FY25 was the largest fundraising year for Advancement at the University of Memphis, and that both academics and athletics had record breaking fundraising years. The endowment was increased through new gifts and prudent investments, and while the donor count was down in FY25, there are plans to address it. She stated that as of this morning Advancement is at \$26 million raised, which is a little over 50% towards goal, with 66% of the fiscal year elapsed, but that she is not concerned as gifts do not come in equally each month. Advancement has focused attention on planned giving this year and has doubled the average gift expectancy for planned gifts from \$100,000 to \$225,000. They have also doubled the amount of planned gift dollars from \$400,000 to \$900,000. She stated the Advancement division is at 76% of funds raised against the total ASCEND strategic plan goal. Calendar year 2025 was a year for growth and building their team with training for the entire staff using what was called the Memphis Blueprint, which details best practices and how they approach advancement activities. They are engaging with Unite to implement a holistic approach in their work with corporations which involves deans, research, athletics, Tiger sports properties, and more. She further stated

that 2025 was a year to build their team and strategies, and 2026 will be a year for execution with one goal being to improve the donor experience. On September 4, 2026, they will launch the public phase of their comprehensive fundraising campaign.

Agenda Item 5: Additional Business

Chairman Carter thanked Dr. Jones and mentioned the balance that exists across the giving categories. He further stated that one of the things that is unique about the University of Memphis is how many people outside of the alumni base contribute to the university itself. He then asked if there was any additional business before the committee. Trustee McKinney commended Dr Jones and Dr Scott for their teams' work. He remarked that what they have been able to accomplish, especially in that major gift range of \$50,000 to just under \$1M, shows that this giving is going to be sustainable and that there is momentum moving into the future. Chairman Carter asked if there was any other new business or comments.

Agenda Item 6: Adjournment

As there was no other new business, Chairman Carter called for a motion and second for adjournment. A motion and second was properly made and the meeting was adjourned.

4. Advancement Update

Presentation

Presented by Tara Jones



THE UNIVERSITY OF
MEMPHIS

Board of Trustees

Advancement Update

Advancement
Committee

Dr. Tara Jones

Senior Vice President
for Advancement
President, University of
Memphis Foundation

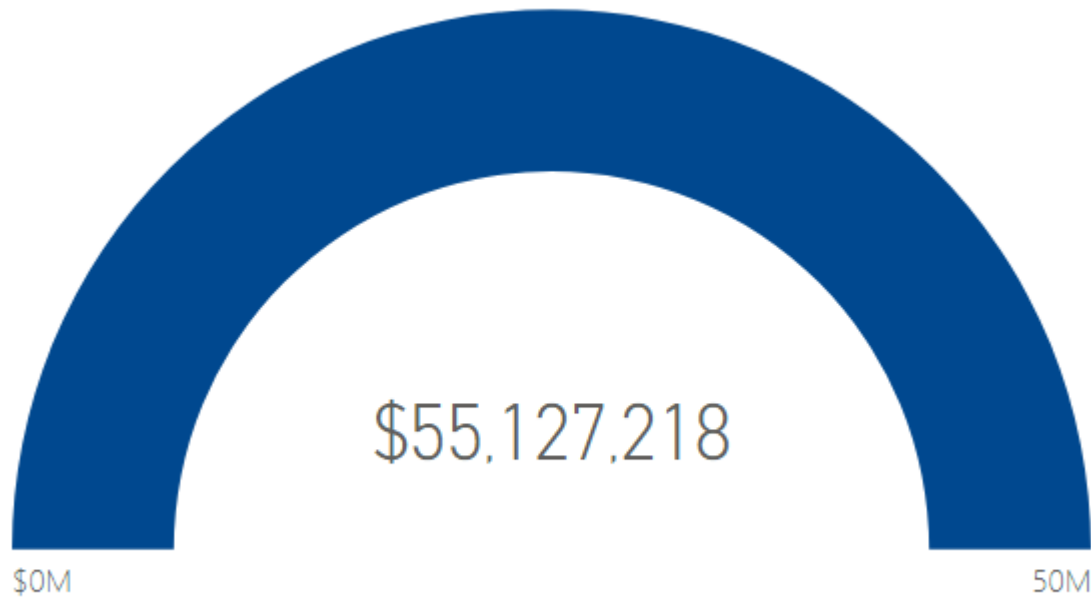
September 2, 2026
University Center

Advancement KPIs

	FY2020	FY2021	FY2022	FY2023	FY2024	FY2025	FY2026
New Gifts & Commitments	\$33,715,000	\$36,726,000	\$51,851,236	\$36,246,964	\$37,261,170	\$64,899,090	\$55,127,218
Alumni Donor Count	5,273	6,024	5,869	4,920	4,438	4,246	3,876
Total Donor Count	8,234	9,041	10,786	9,641	9,208	8,716	8,250

FY26 | By the Numbers

FY26 Total Raised



Percentage of Goal Raised

110%

FY26 | By the Numbers

Record new
commitments for
scholarships and
programmatic support:
\$21M+

Second highest
fundraising total in
University history
\$55.1M

Strongest planned
giving year in past four
years:
\$8.3M

Record level of faculty
and staff donors:
445

Highest average gift size
in University history:
\$4,815

Leadership gifts of
\$50K+
119

FY Comparisons

Strategic Category	FY23	FY24	FY25	FY26
Academic Facilities	\$885,035	\$1,330,373	\$14,281,943	\$3,175,280
Annual Scholarships / Fellowships	\$2,052,545	\$2,137,451	\$ 5,116,080	\$3,226,784
Annual Programmatic Support	\$6,810,760	\$5,089,383	\$10,032,829	\$6,162,966
Athletics	\$11,454,890	\$23,475,944	\$33,070,513	\$31,165,554
Endowed Scholarships / Fellowships	\$4,424,031	\$4,743,495	\$2,949,539	\$6,320,576
Endowed Funds for Excellence	\$1,444,933	\$391,880	\$977,501	\$4,951,594
Faculty Support	\$8,853,436	\$208,596	\$ 366,899	\$124,464

Campaign Designations

Strategic Category	Campaign Amount
Academic Facilities	\$26,366,500
Annual Programmatic Support	\$68,904,568
Annual Scholarships / Fellowships	\$21,313,791
Athletics	\$150,834,019
Endowed Funds for Excellence	\$23,954,627
Endowed Scholarships / Fellowships	\$35,650,787
Faculty Support	\$16,053,827
Total As of 8.7.2026	\$343,078,120

Endowment Gifts

Incoming Revenue

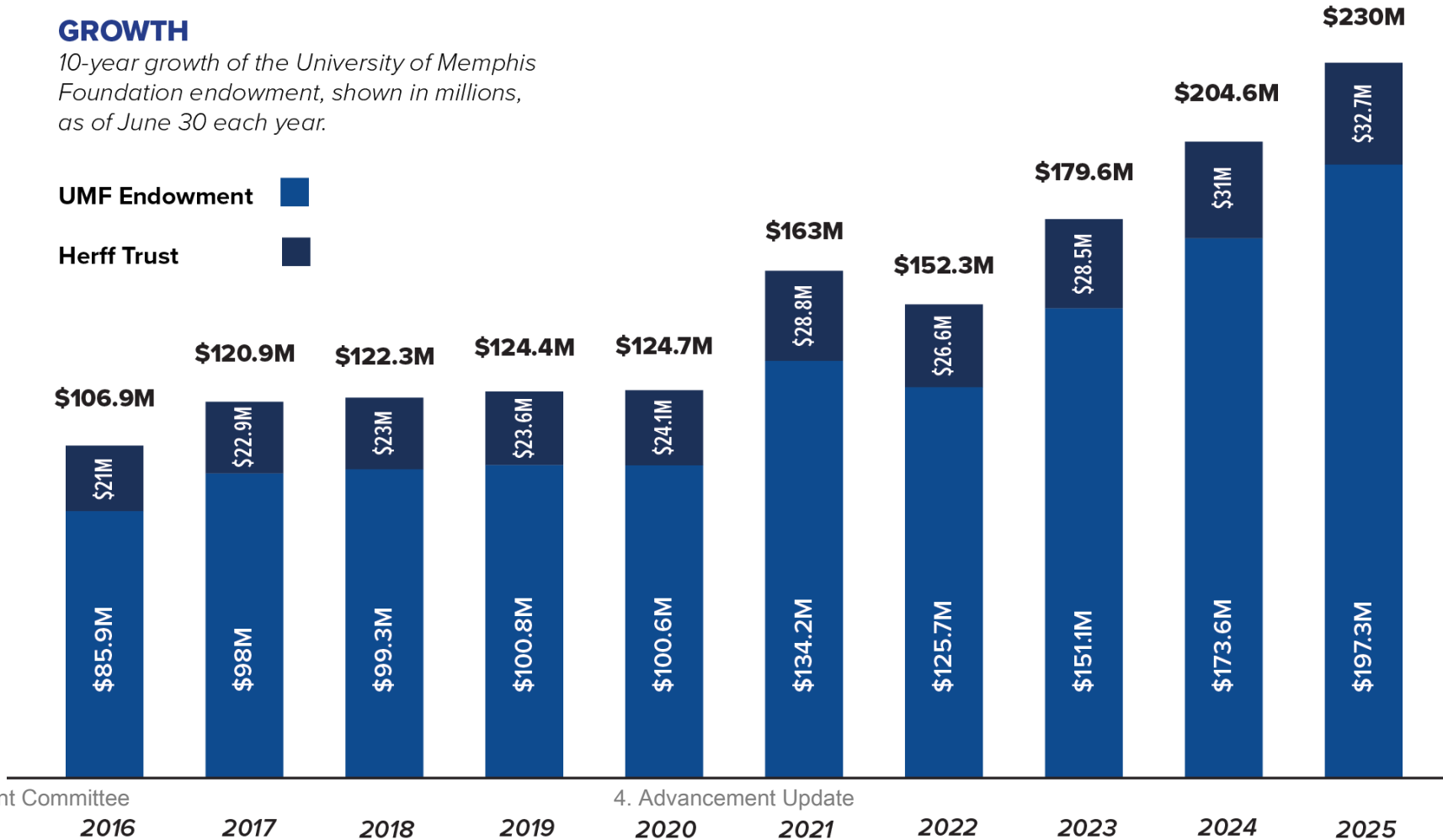
	Gifts to Endowment	% of cash total received
FY20	\$3.3 M	12%
FY21	\$7.3 M	25%
FY22	\$9.0 M	23%
FY23	\$14.3 M	31%
FY24	\$6.9 M	20%
FY25	\$5.9 M	13%
FY26	\$4.1 M	10%

University of Memphis Foundation

GROWTH

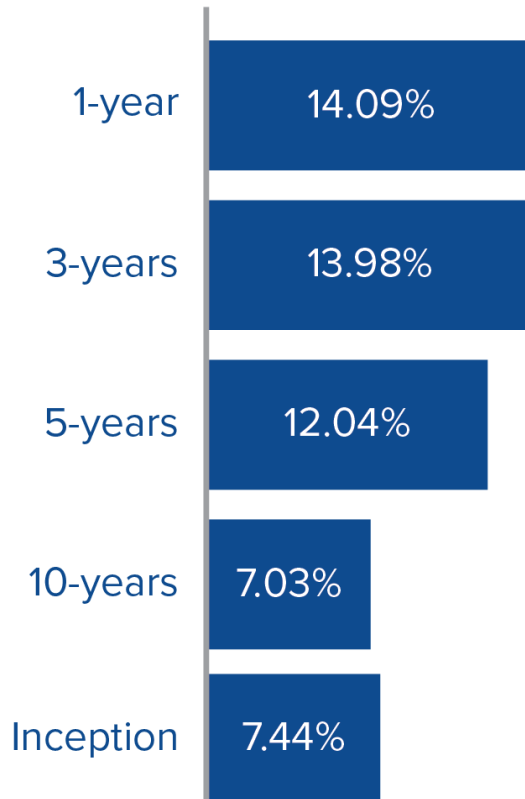
10-year growth of the University of Memphis Foundation endowment, shown in millions, as of June 30 each year.

UMF Endowment 
Herff Trust 



University of Memphis Foundation

UMF TOTAL RETURN



UMF 5-YEAR

total distribution

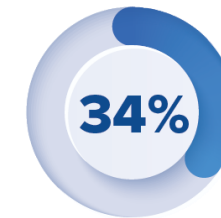
\$43,739,161

2026 UMF Distribution

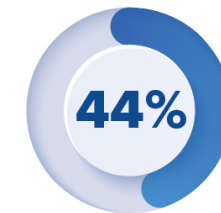
to the university for the
2025-26 academic year

\$9,684,276

2025-26 Academic Year UMF Endowment Distribution



**Academic
Programs**



**Student
Scholarships**



**Endowed
Chairs and
Professorships**

THIS WEEK!

CAMPAIGN KICK-OFF EVENT

September 4, 2026

Scheidt Family
Performing Arts Center



5. Additional Business

Presented by William E. Orgel

6. Adjournment

Presented by William E. Orgel