

An aerial photograph of a university campus, featuring a large, multi-story building with a prominent gabled roof and a central entrance. The building is surrounded by trees and a paved area. The image is overlaid with a dark blue gradient.

University Senate

Scott Roberts, President and CEO

Monday, February 3, 2020

UConn
FOUNDATION

An aerial, high-angle photograph of a university campus, likely the University of Connecticut. The image is dark and semi-transparent, serving as a background for the text. It shows a large, multi-story building with a prominent tower, a circular driveway or plaza in the foreground, and various other campus structures and green spaces.

About the UConn Foundation

UConn Foundation, Inc.

501(c)(3) tax exempt corporation

- Separate legal entity from the University
- Governed by volunteer board of directors (32 voting members)
- 9 ex-officio non-voting members
 - Foundation President
 - University President, Provost, EVP Health Affairs, CFO, Athletic Director,
 - Faculty Representative, Student Representative, BOT representative

Connecticut non-stock corporation

- Incorporated exclusively for purposes of supporting the University
- Bylaws and Certificate of Incorporation on file with Secretary of State

Subject to requirements under Conn. Gen. Stat. Sec. 4-37e et seq.

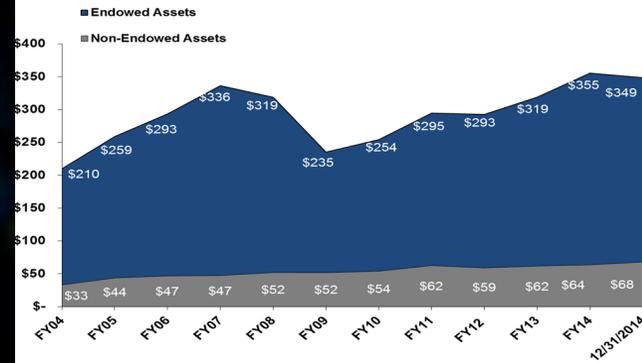
- Established for principal purpose of supporting a state agency

Designated by University under Master Operating Agreement and annual Statement of Work

- Fundraising, Alumni Relations and Investment Management responsibility



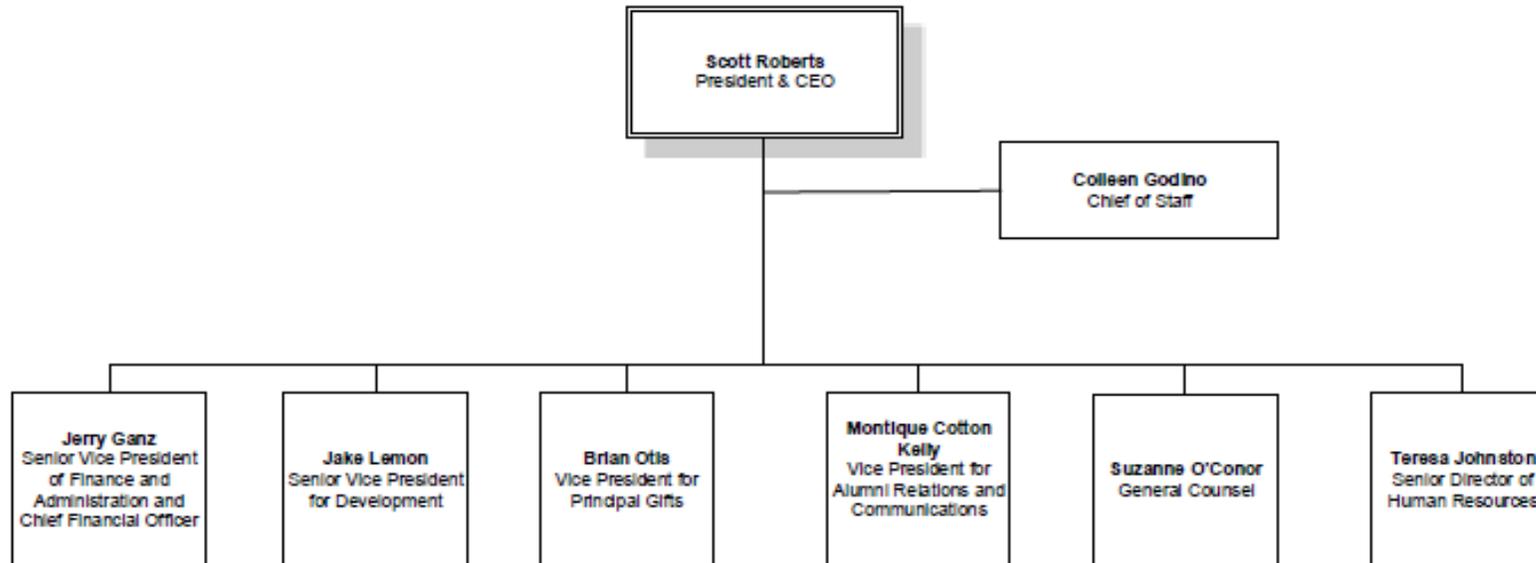
Foundation's Current Mission Statement



***Strengthening UConn
One Relationship at a Time***

Foundation's Senior Leadership

ORGANIZATIONAL CHART Executive

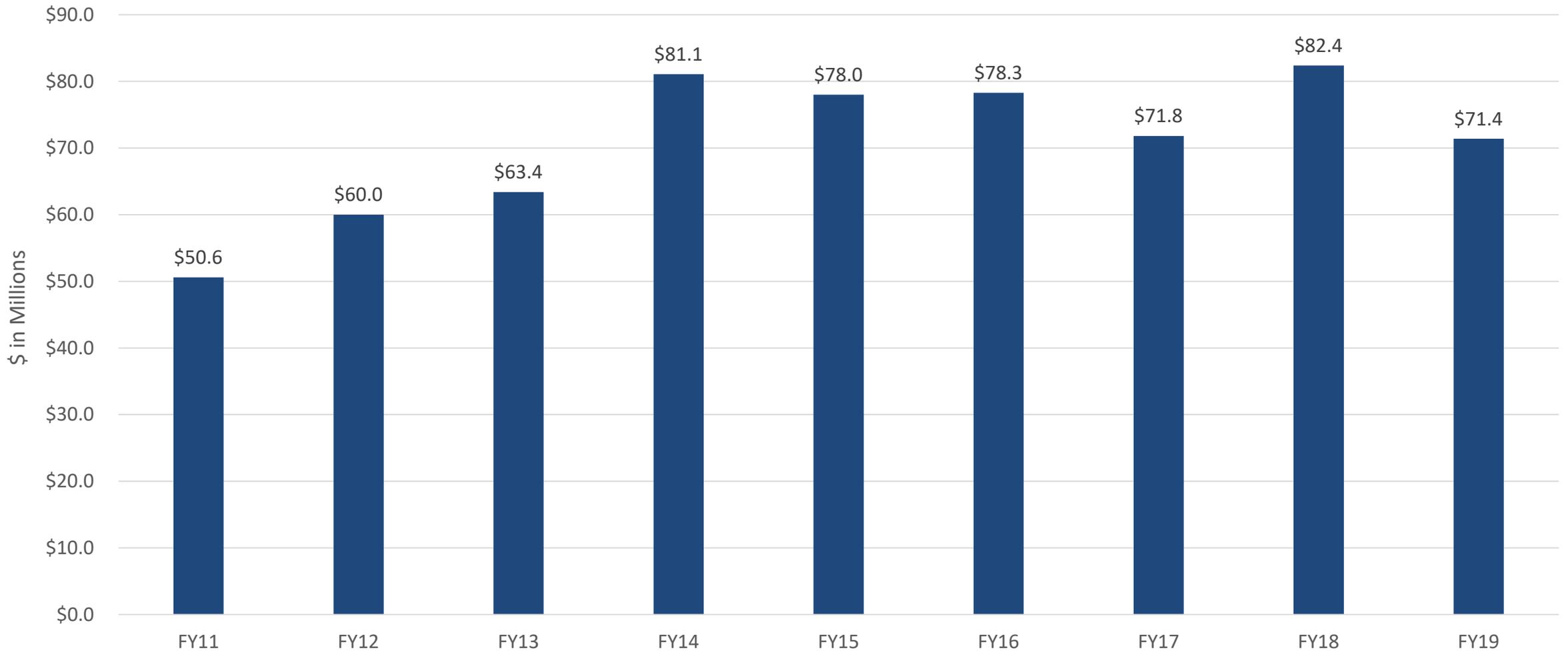




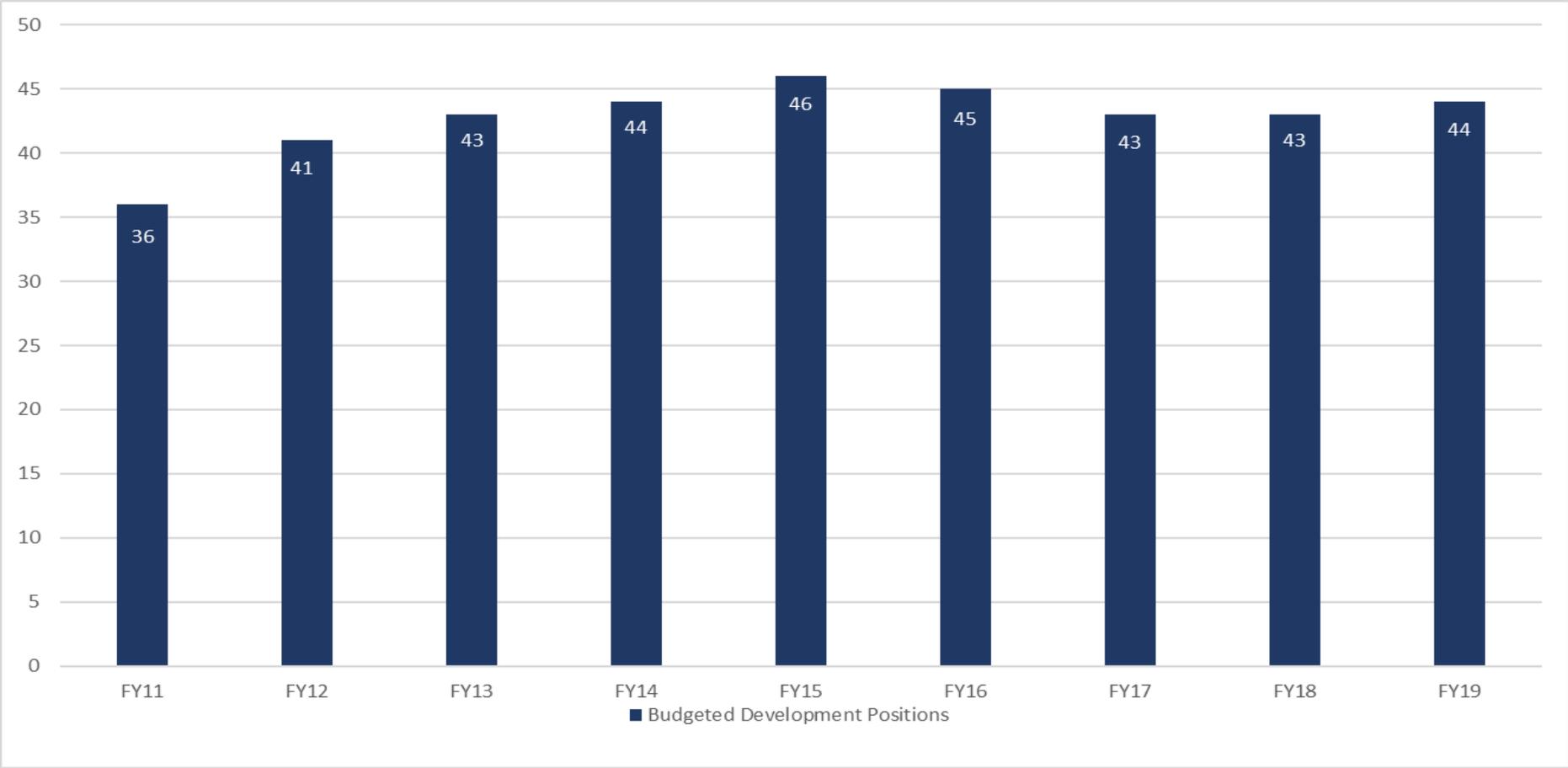
Development Office

Fundraising Commitments (FY10-FY19)

Commitments in Millions

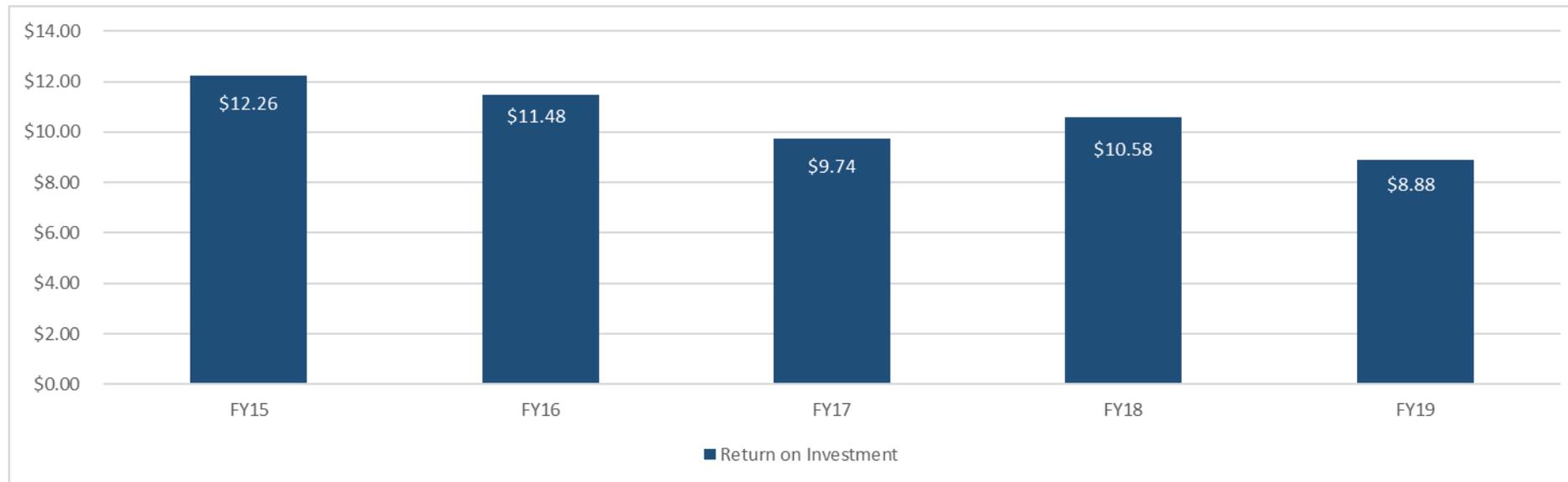


Major Gift Officer Headcount (FTE's)



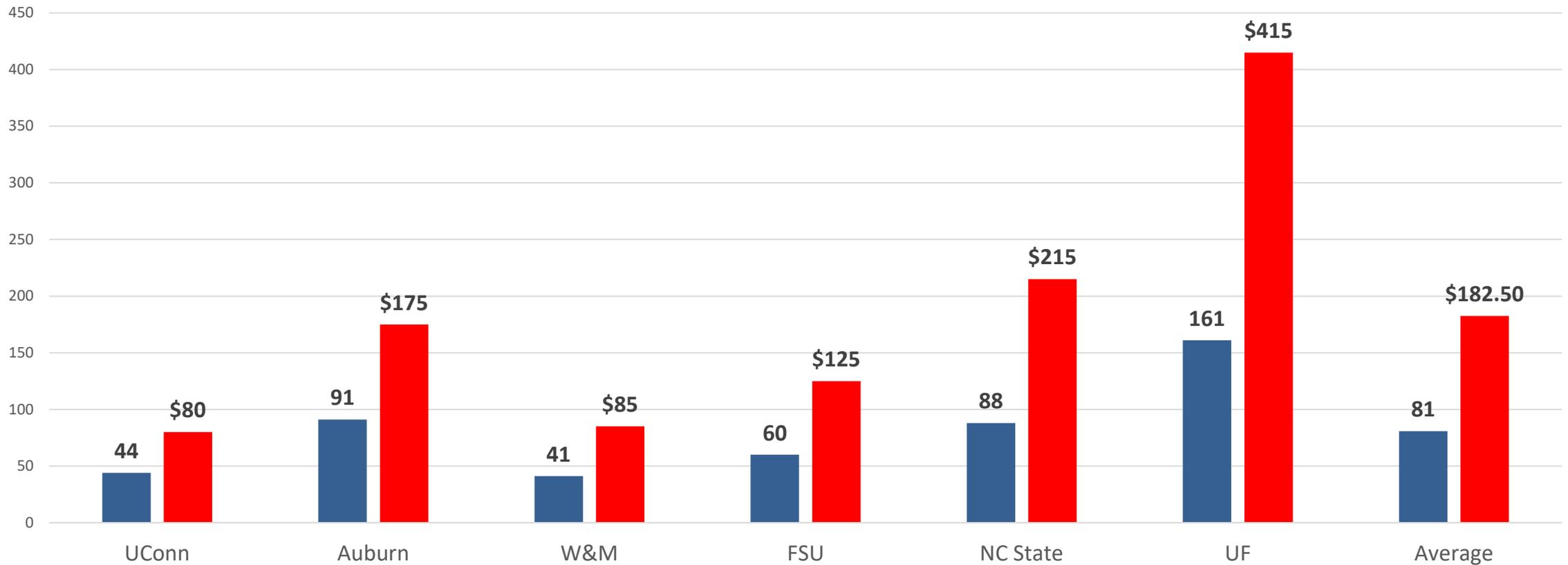
Cost of Fundraising

	<u>FY15</u>	<u>FY16</u>	<u>FY17</u>	<u>FY18</u>	<u>FY19</u>	<u>Average</u>
Fundraising Expense	\$6,364	\$6,819	\$7,376	\$7,791	\$8,042	\$7,278
Total Commitments	\$77,987	\$78,301	\$71,836	\$82,455	\$71,432	\$76,402
Return on Investment	\$12.26	\$11.48	\$9.74	\$10.58	\$8.88	\$10.59



MGO FTE's vs. Dollars Raised Peer Comparison

Development Professionals vs. Dollars Raised



Correlation Coefficient = .98907

Regional Development Focus

- South East: Florida
- Midwest: Dallas, Houston, Chicago
- NYC/Fairfield County
- Connecticut (Based in Stamford and Stamford Campus)
- West Coast: San Francisco, Los Angeles, San Diego
- Mid-Atlantic: D.C., Charlotte, NC
- Boston and New England
- Hartford Campus and Social Work
- Avery Point Campus



An aerial, high-angle photograph of a university campus, rendered in a dark blue monochrome. The image shows a large, multi-story building with a prominent central tower and a circular driveway in the foreground. The text "Alumni Relations" is overlaid in the center in a large, white, sans-serif font.

Alumni Relations

Alumni Relations



Annual Giving Strategies

Phonathon
Direct Mail
Ignite
Giving Day
Close to Home

Fiscal Year '19 (7.1.18-1.30.19)

Number of Events	231
Total # of Attendees	10,840

Fiscal Year '20 To Date

Number of Events	193
Total # of Attendees	11,045

**reduction in events, increase in collaboration and intentionality*



Expenses

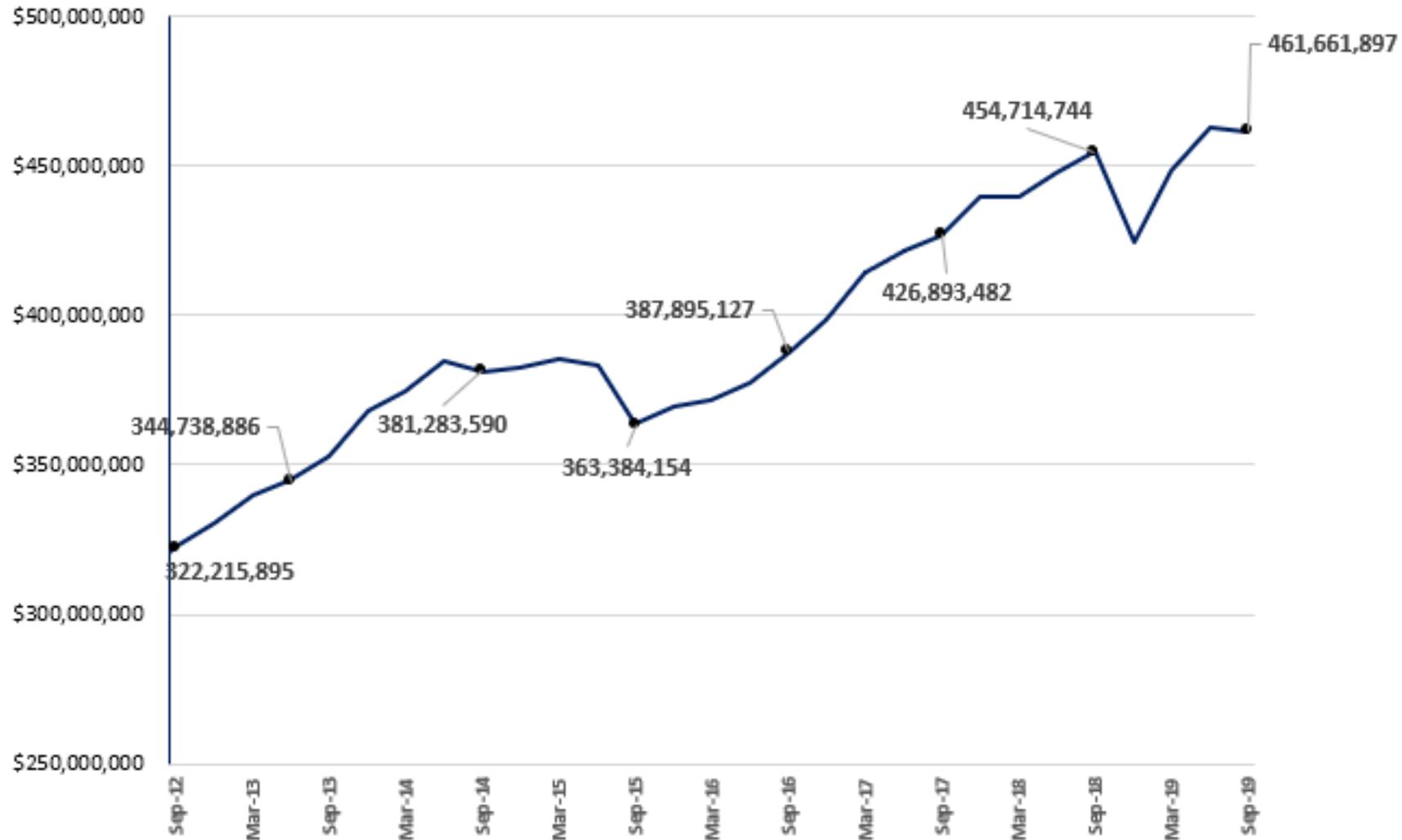
FY 2019 Development Expenses = \$8,042,000

Academic Fundraising	\$7,158,236	(89%)
Athletic Fundraising	883,764	(11%)

An aerial, high-angle photograph of a university campus, rendered in a dark blue, monochromatic color scheme. The image shows several large, multi-story academic buildings with numerous windows, arranged around a central courtyard area. There are paved walkways, some green spaces with trees, and a circular driveway or plaza in the lower center. The overall atmosphere is quiet and institutional.

Endowments and Investments

Historical Total University Endowment

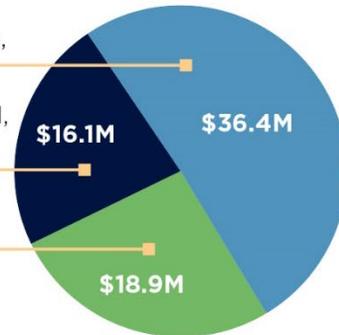


2019 By the Numbers (Fiscal Year 2019)

\$71.4 Million Raised

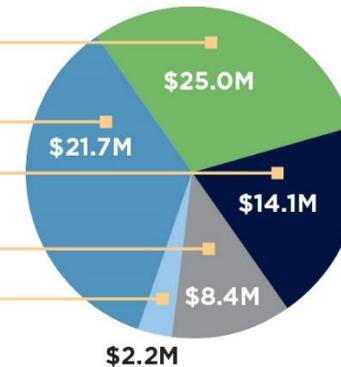
Types of Gifts

- Cash, stock, in-kind donations, and research grants
- Planned gifts pledged in a will, trust, charitable gift annuity, IRA, or other estate plan
- Multiyear gift commitments typically paid over five years



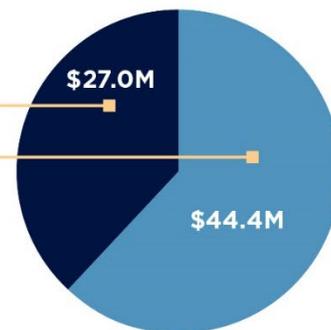
Missions

- Academic programs
- Scholarships and fellowships
- Research
- Capital improvement projects
- Faculty



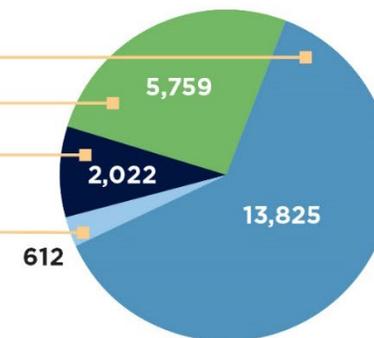
Operations vs. Endowment

- Endowment
- Current operations



22,218 Donors

- Alumni
- Friends
- Parents
- Corporations and foundations



Divesting of Fossil Fuels

- Less than 2% of investments have exposure to fossil fuels
- Statement from new investment adviser:
- “We are making sustainability integral to the way BlackRock manages risk, constructs portfolios, designs products, and engages with companies. We believe that sustainability should be our new standard for investing.”

An aerial photograph of a university campus, showing various buildings, walkways, and green spaces. The image is dimmed and has a dark blue tint. Overlaid in the center is the text 'Q&A' in a large, white, sans-serif font.

Q&A