

# 2026 ADRP Northeast - Mid-Atlantic Regional Conference

May 15 | SUNY Global Center  
New York, New York



ASSOCIATION OF  
DONOR RELATIONS  
PROFESSIONALS

BUILDING  
RELATIONSHIPS  
FOR GOOD

™



# Fund and Scholarship Stewardship Practices in a Decentralized Environment

**Lauren Jesmer, Assistant Director of Stewardship Impact Reporting**

**Shannon Dowling, Director of Fund Administration**

**UConn Foundation**

## UConn | FOUNDATION

- Fee-for-service arrangement with UConn
- Founded in 1964
- 166 employees: Development, Finance, Advancement Services, Alumni; 58 are front-line fundraisers
- Raised between \$120-\$150 million per year, last three years
- Endowment worth \$713 million (as of 12/31/2025)



# Speakers

## Lauren Jesmer

- Donor Relations and Stewardship Team
- Scholarship letters, endowment reports, and endowed faculty impact reports

## Shannon Dowling

- Finance Team
- Create and maintain 7,900 accounts (2,500 endowed)
- Collaboration:
  - DOs/ General Counsel on establishment
  - DOs/Donor Relations on financial stewardship
  - Gift Processing
  - UConn Partners: Deans and Finance Staff



# UConn | UNIVERSITY OF CONNECTICUT

# UConn HEALTH

## THE UNIVERSITY

- Founded 1881
- Main Campus: Storrs
- 4 Regional Campuses: Avery Point, Hartford, Stamford, Waterbury
- School of Law, School of Social Work, and Graduate Business Learning Center: Hartford
- UConn Health: Farmington (Schools of Medicine & Dental Medicine, graduate programs, medical & dental clinics, UConn John Dempsey Hospital) and clinical locations throughout the state
- Land Grant & Sea Grant college, Space Grant Consortium institution
- Storrs & Regionals ≈3,938 acres; UConn Health ≈210 acres

## STUDENTS | FALL 2025

### Academic Programs & Degrees

- 14 Schools & Colleges  
Agriculture, Health & Natural Resources; Business; Dental Medicine; Neag Education; Engineering; Fine Arts; Graduate; Law; Liberal Arts & Sciences; Medicine; Elisabeth DeLuca Nursing; Pharmacy; Ratcliffe Hicks Agriculture; Social Work
- 8 undergraduate degrees: 128 majors
- 17 graduate degrees: 100 research and professional practice fields of study
- 6 professional degree programs (JD, LL.M, MD, DMD, Pharm.D., SJD)

<b>Degrees 2024-25</b>	<b>8,971</b>	Dental Medicine	52
Bachelor's	5,693	Graduate/Professional Certificates	529
Master's	1,827	6-Year Education	40
Doctorates	408	2-Year Agriculture	32
Law (JD, LL.M)	191	Degrees by: Female	55%
Pharm.D.	84	Degrees by: Minority	35%
Medicine	115		

### Total Fall 2025 Student Enrollment: 34,424

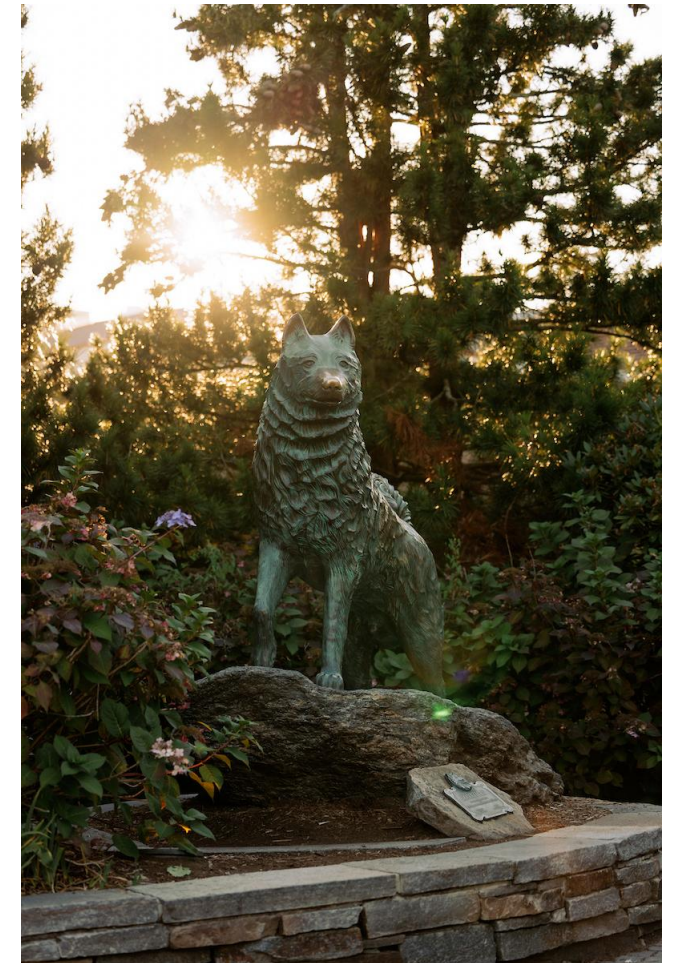
21,042	Undergraduate at Main Campus
5,149	Undergraduate at Regional Campuses
<b>26,191</b>	<b>Subtotal Undergraduate</b>
6,867	Graduate (MA/Ph.D., Including 312 at UConn Health)
567	Law
133	Pharm.D.
461	Medicine
205	Dental Medicine
<b>8,233</b>	<b>Subtotal Graduate/Professional</b>

UConn is among the

# Top Ranked

public universities in the nation.

— U.S. News & World Report America's Best Colleges (2026)





# UConn | UNIVERSITY OF CONNECTICUT

# UConn HEALTH

## BUDGET | FISCAL YEAR 2026

**Total Current Funds Budget: \$3.6 Billion**

### MAIN & REGIONAL CAMPUSES

<b>Revenue</b>	<b>In Millions</b>
State Appropriation	\$268.2
Additional State Support/Adjustments	1.0

**Total State Support \$269.2**

Student Tuition & Fees	1,004.4
Gifts, Grants & Contracts	380.4
Sales/Service - Auxiliary Enterprises	78.3
Sales/Service - Educational	18.0
All Other Revenues	28.0

**Total \$1,778.2**

### Expenditures

Academic Services	\$733.0
Research Services	179.1
Student Services	683.3
Operating, Support & Physical Plant Services	220.7

**Total<sup>1</sup> \$1,816.1**

### UConn Health

<b>Revenue</b>	<b>In Millions</b>
State Appropriation	\$143.5
Fringe Benefits	0.8
Additional State Support	0.0
Student Tuition & Fees	36.1
Gifts, Grants & Contracts	107.1
Interns & Residents	99.5
Net Patient Care	1,169.3
All Other Revenues	253.1

**Total \$1,809.5**

### Expenditures

Hospital & Health Services	\$1,259.8
Academic Services	276.3
Research Services	139.1
Operating, Support & Physical Plant Services	196.1

**Total<sup>1</sup> \$1,871.3**

<sup>1</sup> Prior year balances will fund the net loss



## Total Undergraduate Student Cost – 2025-2026

	In-State	Out-of-State
Tuition, Fees, Room <sup>1</sup> & Board <sup>2</sup>	\$36,110	\$58,778
Tuition & Mandatory Fees	\$21,334	\$44,002
Tuition Only	\$17,010	\$39,678

<sup>1</sup> UConn housed approximately 14,000 students in 107 residence halls.

<sup>2</sup> Board rate shown reflects the Value Plan, which is the most popular plan available.

## Student Financial Aid – Fiscal Year 2025

Financial Aid Support: \$733.7 million

	Main Campus/ Regional <sup>1</sup>	UConn Health
Scholarships & Grants	\$351.1 Million	\$7.7 Million
Loans	\$248.1 Million	\$23.3 Million
Tuition Waivers	\$103.5 Million	

<sup>1</sup> Nearly 26,400 students received financial aid packages in FY 2025. 43.7% of all tuition dollars are dedicated to scholarships and grants.



**BECAUSE  
OF UCONN**The Campaign  
for UConn Nation

The multi-year “Because of UConn” Campaign is comprehensive, spanning all schools, colleges, campuses, and UConn Health. The campaign focuses on four pillars:

- **Students First:** making transformative investments in financial aid, student health, career readiness, and life skills to improve time-to-degree and career outcomes.
- **Academic & Innovation Excellence:** driving investment in top faculty and graduate fellows and building the innovation ecosystem of the state and beyond.
- **Health & Wellness of People & Planet:** focusing on patient care, medical research, and the development of life-changing technologies that improve healthcare outcomes.
- **Husky Pride:** investing in athletic excellence and supporting a thriving UConn Nation that includes more than 290,000 alumni worldwide.

# Objectives

- Follow the process of establishing new funds in a decentralized environment
- Options for awarding funds and scholarships with varying timelines and processes
- Describe successes and challenges in stewardship efforts



# Meet Jonathan

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Jonathan is a proud alum of the College of Engineering and was an All-American basketball player

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He is donating \$500,000 to establish an endowed scholarship for undergrads in the College of Engineering



# Establishment

- Communication with awarding unit
- Workflow to sign documentation
- Establish fund in CRM
- Utilize reports and automated emails to communicate back to awarding unit



***Constant communication and relationship building***

# Awarding



- Reporting and CRM access needed to communicate criteria and spendable balances
- Decentralized and Foundation means lengthy timelines for reimbursing awards and receiving student information

# Scholarship & Stewardship Process

- Units award and notify students
  - DRS will do targeted outreach
- Scholarship survey/letter portal
  - Choice of questions
- Review and proof letters
- Connect with development officers
- Send and monitor digital reports



## STUDENT NAME

Chemical Engineering  
Scholarship Fund

GRADUATION YEAR  
2027

HOMETOWN  
New Britain, CT

AREA OF STUDY  
Bachelor of Science in  
Engineering, Chemical  
Engineering

ACTIVITIES & INVOLVEMENT  
American Institute of  
Chemical Engineering,  
UConn Chapter

### What are you looking forward to most in the months ahead?

I am looking forward to delving into the research opportunities at UConn in the coming semesters. I'm aware of many professors who are conducting interesting and significant research on campus, and can't wait to be a part of that community.

### What are your goals for the future?

I aim to maintain my academic excellence while gaining research and internship experience that prepare me for a career in chemical engineering, guiding myself to a career in the field that fits my skills and interests best.

### What message would you like to share with our generous community of scholarship supporters?

I thank the community of scholarship supporters at UConn for lessening the financial burden of attendance for students like myself, allowing us to focus on our academics and the many learning opportunities available to us here.

Donor Name

# FY25 Scholarship Statistics

- Scholarship funds: 1,713
- Total awards: 5,157
- Distinct award recipients: 3,957
- Letters received: 933
- Letters processed: 1,528
- Letters sent to fund contacts: 578



# What Works



- Consistency in stewardship process and materials
- Full picture University-wide
- One source for fund administration information

# Challenges

- Inconsistent awarding timelines
- Delayed information: awarding, adjustments, etc.
- Harder to “tune in” to the specific needs of the units



# How do we find success?



- Communication
  - Development officers
  - Finance (Foundation and university)
  - Awarding unit
- Tracking and Metrics
- Future?
  - Scholarship centralization and timeline guidance



# Monthly Scholarship Notification

Please refer to this [Tips and Tricks](#) for guidance and contact [Scholarship Stewardship](#) with any questions.

Contact Name	Account	Award Recipient
<p>[REDACTED]</p> <p>[REDACTED] (Cell Phone) [REDACTED] (Preferred Email)</p> <p><b>Stewardship Preference:</b> Email Only <b>Contact Type:</b> Fund Owner</p> <p><b>Donor requested exclusion from scholarship stewardship:</b> No</p> <p>Jordan D. Abbott <a href="mailto:jabbott@foundation.uconn.edu">jabbott@foundation.uconn.edu</a></p>	<p><a href="#">0023462 The Professor Richard W. Parker D.C. Semester Fund</a></p> <p><b>Unit:</b> Law <b>Scholarship Term:</b> 2025 - 2026 Academic Year <b>Scholarship Recipient Date Added:</b> February 2026</p> <p><b>Spendable Balance:</b> [REDACTED] <b>Last Disbursement Date:</b> 2/18/2026 <b>Market Value Amount:</b> \$0.00 <b>Market Value Date:</b> <b>Underwater:</b> No <b>Percent Spending to Market Value:</b> 0.00%</p>	<p>[REDACTED] Juris Doctor, School of Law, Major - Law: Three Year Day Division, Student Level - Professional Year 2</p> <p>[REDACTED] Juris Doctor, School of Law, Major - Law: Three Year Day Division, Certificates - Human Rights, Student Level - Professional Year 3</p> <p>[REDACTED] Juris Doctor, School of Law, Major - Law: Three Year Day Division, Student Level - Professional Year 3</p>

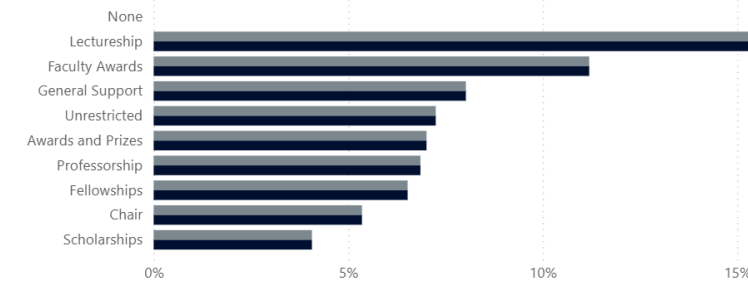
# Financial Stewardship Success

- Financial Stewardship shows impact!
- Strategies
  - Annual account reviews
  - Innovative dashboards and datapoints

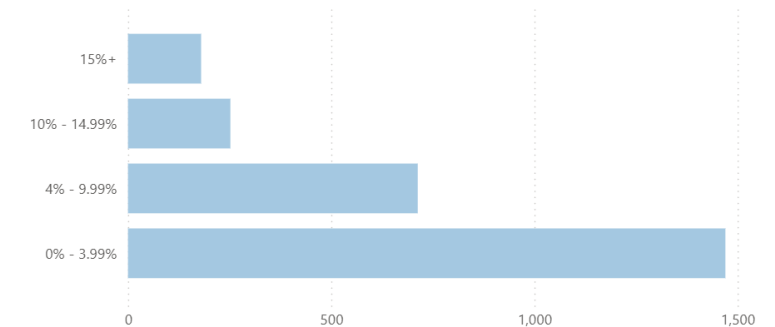
UCONN FOUNDATION Unit Finance Summary		All Units Selected		
Department Filter(s) Applied:				
All Departments Selected				
Endowed Accounts		Endowed Accounts		Non-Endowed Accounts
2,615 <small>Total</small>		Category	Spendable Balance vs. Market Value: University	5,358 <small>Total</small>
\$42,126,611.52 <small>Overall Spendable Balance</small>	5/12/2026 <small>Spendable Balance as of:</small>	Awards and Prizes	7.01%	\$114,653,702.22 <small>Spendable Balance</small>
\$701,943,610.62 <small>Overall Market Value</small>	3/31/2026 <small>Market Value as of:</small>	Chair	5.35%	
6.00% <small>Overall Ratio of SB vs MV</small>	6.00% <small>University Average of SB vs MV</small>	Faculty Awards	11.20%	
		Fellowships	6.53%	
		General Support	8.03%	
		Lectureship	15.88%	
		None	N/A	
		Professorship	6.86%	
		Scholarships	4.07%	
		Unrestricted	7.25%	

Endowed Accounts: Ratio of Spendable Balance vs. Market Value

● University Average ● Selected Unit/Department



Total Endowed Accounts by Spendable Balance/Market Value Ratio



# And Jonathan?

At UConn, we are champions at everything we do.



Questions?

# Let's Connect!

## Lauren Jesmer



## Shannon Dowling



Follow the QR codes to LinkedIn



AD  
RP

ASSOCIATION OF  
DONOR RELATIONS  
PROFESSIONALS