



*Transforming Lives*

FY 2015 Endowment Report

**UConn**  
FOUNDATION

## An Endowment Report Compiled for You



**Joshua R. Newton**  
President and CEO  
UConn Foundation

**F**irst and foremost, let me say THANK YOU! I am so happy to share with you the latest information available on the University of Connecticut's endowment fund. The accompanying report contains a variety of numbers that, thanks to you, show our endowment is healthy — and growing. The report also provides a glimpse of how your generosity makes a difference for faculty and students. A growing endowment is essential to a growing public university, such as UConn. It helps insulate our students, teachers, and staff from the ups and downs of an ever-changing economy. To those who have helped us on our mission to make UConn a “Top 10” public university, we say one more time: THANK YOU!



“I have become acutely aware of the **vital significance** that endowment support makes in the University's ability to **EXPAND** educational opportunities.”

- LYNN Z. BLOOM,  
AETNA CHAIR OF WRITING

**2015**  
**UConn Endowment**

**\$383.1**  
**million**



“I have been able to expand my **research program** into a completely new area: autism research using neurons derived from human adult **STEM CELLS.**”

- LESLIE M. LOWE, PHD

**More than 90** endowed faculty positions thanks to your generosity





“We are fortunate that our portfolio has shown a healthy, 8 percent average yearly return for the sixth consecutive year. That growth rate translates into better programs and facilities for the University of Connecticut, and more scholarship aid for our high-achieving students.”

**Jerry Ganz**  
Vice President of Finance  
and Chief Financial Officer  
UConn Foundation

## Your Endowed Funding at Work

During a year marked by uncertainty and heightened volatility in the financial markets, the UConn Foundation’s endowment gained 2.04%, beating its policy benchmark, which returned 1.91%. The portfolio’s sixth consecutive year of positive returns has resulted in a healthy 8.0% average yearly return during that period.

The portfolio’s best performing assets were those insulated from market volatility, particularly private real estate, private equity, and pharmaceutical royalties. During this challenging year, equity investments gained just 1.0%. However, this compared favorably to a benchmark return of 0.7%. Allocations to hedge fund strategies also helped to cushion the portfolio during the increased volatility experienced during the year. Collectively, these investments gained 3.0% during the fiscal year while their benchmark gained 2.8%.

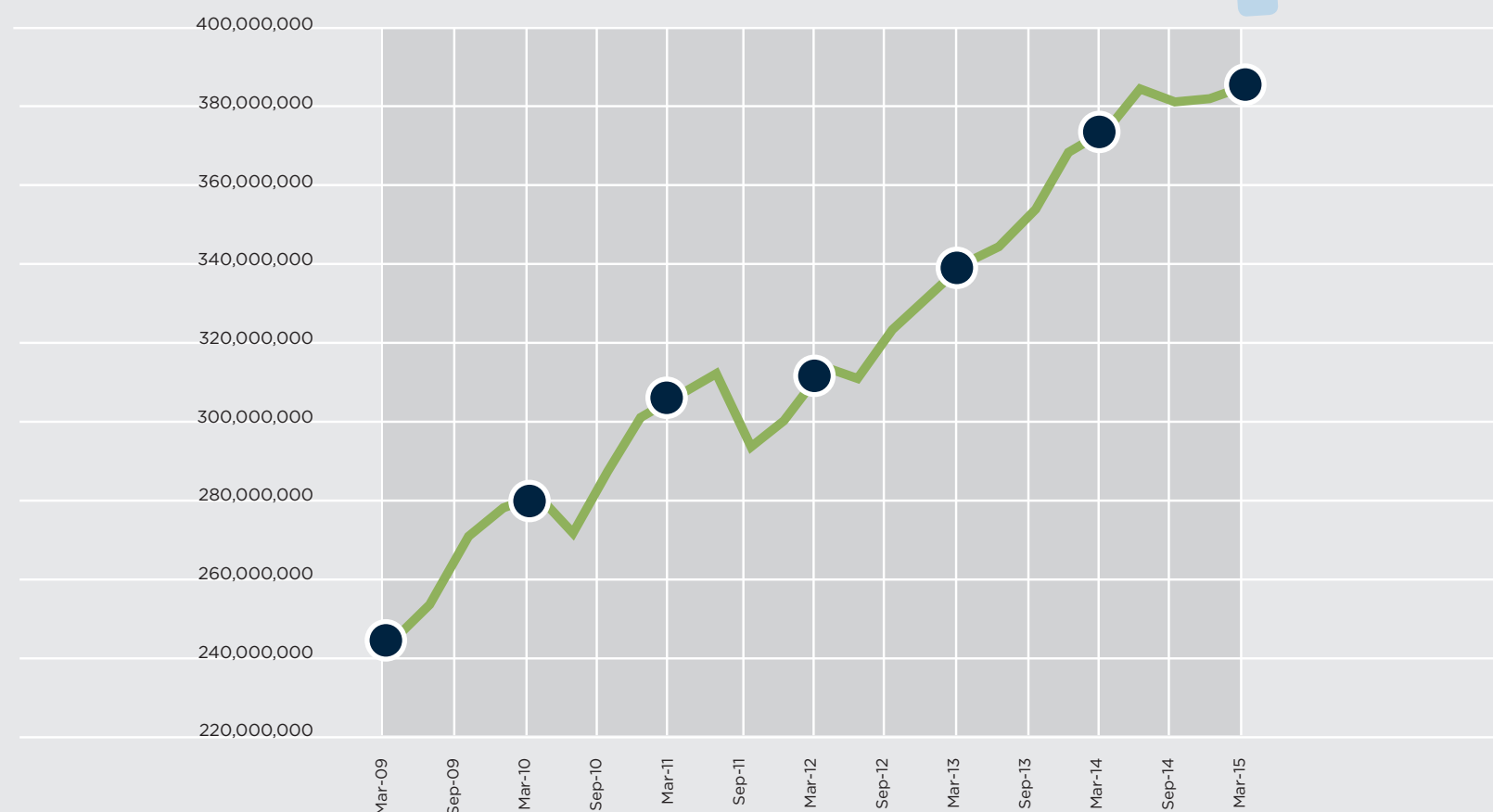
The most disappointing investments were commodities, which lost -16.5% during the year as inflation remained atypically low. Fortunately, commodities made up just 1% of the portfolio. Investment grade fixed income investments gained 0.5% while the benchmark lost a whopping -7.1%. Outperformance in this area was achieved by using unconstrained global investment funds. High yield investments also gained 0.5% while their benchmark lost -0.5%. This outperformance was largely due to making lower risk investments.

The Foundation’s long-term portfolio now totals \$332.1 million. During the six-year period noted above, the portfolio has grown by \$107 million or 48%. UConn’s total endowment, which includes the Foundation’s endowment and endowed gifts to the university and the Law School Foundation, now stands at \$383.1 million. That total represents an increase of \$129.4 million since June 30, 2009 or 51%.

**Endowment Funding helps us** provide resources for student scholarships, enables the research of our renowned scholars and professors, facilitates the discovery of innovative treatments and cures for diseases, and drives economic development.

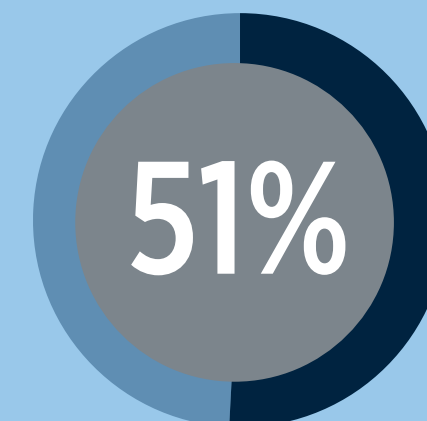
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## Six Years of Growth



## Endowment Growth Since 2009

**6** consecutive years of positive returns for the Foundation’s portfolio.





## Endowments Support Teaching and Research Innovations



For the first time in my faculty career, I had a blind student in one of my classes. The program, MathScriptor, which was developed in part with funding provided by the Harold S. Schwenk Sr. Distinguished Chair of Chemistry, was modified so the student could control the speed of talk, and position of the text, to speech. The student received the highest grade in the class.

- Robert R. Birge, PhD



We worked on a \$3 million federally-funded research grant to develop students' ability to conduct online research in science. This study is changing the way we now think about reading in schools. None of this work would have been possible without the gift of the Neag Endowed Chair.

- Donald J. Leu, PhD



This past year, I developed a new air pollution service learning course. As this is a service-learning course, the students worked on projects posted by community partners as part of the course. This provided students with an experiential learning opportunity.

- Kristina M. Wagstrom, PhD

### UNIVERSITY ENDOWMENT

	Value	Funds
UConn Foundation	\$350,578,953	1,545
Law School Foundation	\$20,852,857	114
University Funds Managed by UConn Foundation	\$11,717,023	77
<b>Total University Endowment</b>	<b>\$383,148,833</b>	<b>1,736</b>

More than  
1,700  
funds







## Your endowed gifts continue to inspire transformation.



“Ever since I was a child, I have always wanted to go to UConn. The only issue preventing me from going was finances. Even with both parents working full time, we still were not able to afford the cost of attendance. This scholarship has allowed UConn to be a little more affordable for my family and me. Thank you for helping to make my dream a reality. I am so grateful for this award and I guarantee it will be put to good use.”

—David Santiago '17, College of Liberal Arts and Sciences



“I am proud to call myself a Rowe Scholar. My scholarship has given me the opportunity to participate in UConn Health programs, including: the Health Disparities Clinical Summer Research Fellowship; the Summer Research Fellowship (Immunology Department); and the MCAT/DAT Preparatory Program. I volunteer at Windham Hospital and Generations Family Health Center and am a research assistant at Connecticut Children’s Medical Center.”

—Chevaughn Wellington '15, College of Liberal Arts and Sciences



“As a ‘first generation’ student, I would like to attain the best education possible in order to live a better life than what was possible for my parents. I am grateful that individuals were willing to invest in my future. With the financial burden taken off my shoulders, I have been able to prepare for the future.”

—Kamila Magiera '16, School of Business

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