
Donor Stewardship Without a Dedicated Development Officer at the UConn Library

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Introduction

The University of Connecticut (UConn) Library faced a series of budget cuts in recent years, resulting in the loss of a dedicated development officer in 2017. Understanding the importance of continuing to build new relationships that could result in donations and the need to maintain relationships with existing donors, members of the staff took on various development roles in addition to their existing job descriptions. Core development officer activities were now dispersed, including monitoring gifts, communicating with donors, and fiscal tracking and reporting. In addition, active outreach opportunities became a focus: including introducing electronic newsletters on behalf of the library and Archives & Special Collections, event planning, and oversight of donor related projects. Even with the success of individual staff members performing these activities on behalf of the library, more was needed to coordinate, communicate, and lay the groundwork for optimally supporting the reinstatement of a development officer in the future. In response, the dean established the Library Advancement & Donor Stewardship (LADS) group to bring cohesiveness to the work, and to audit and account for the effort involved in development activities. In this article, LADS members share history, recent achievements, future expectations for LADS, and presents a case study for supporting a coordinated development approach.

History of Development at the UConn Library

In the 1990s, the UConn Library had a robust development program, which included a full-time development officer and one part-time support staff, working collaboratively with the full support of the UConn Foundation ([an entity which conducts private fundraising on behalf of the University of Connecticut](#)). Working hand-in-hand with the foundation, the library capitalized on many opportunities to connect with donors, completing successful major campaigns including raising funds to support the building of the Thomas J. Dodd Research Center (now the Dodd Center for Human Rights) to house archival materials, countless

improvements to the Homer Babbidge Library primarily through anniversary class gifts, and building a robust set of endowments to build collections, maintain buildings, and increase programming. Over time, budget cuts and restructuring at the UConn Foundation slowly decreased support by splitting the development officer's time with other departments, moving the staff physically out of the library and into the central office, and reducing their cost share for the officer's salary. The library faced budget cuts throughout this time and did not have funds to make up for the decrease in support. As a result, today, we have no dedicated internal staff and are supported by one-third of a development officer in the foundation.

Without a dedicated development officer since 2017, no friends group or oversight board, and changing library leadership between 2016-2018, the libraries' endowments suffered. In February 2018, with the new dean's arrival, efforts were made to increase development activities with existing staff. After assessing the situation, which included continued budget decreases, a new library committee, the Library Advancement & Donor Stewardship (LADS) group, was created to recommend and implement a formal stewardship program, increase donor engagement and stewardship activities, coordinate among the different departments throughout the library, and continue to build on previous positive relationships with the Foundation.

In December 2019, LADS held its first meeting with representatives from the library's: Senior Leadership Team, Communication & Marketing unit, Archives & Special Collections, Financial Services, Acquisitions & Discovery, Access Services, and Greenhouse Studios (digital humanities/scholarship). The Dean selected representatives for the group based on existing involvement with development activities, and the group added other members over time based on both existing engagement and interest in future engagement. Staff involvement increases or decreases based on projects, interests, and job duties. Still, meeting agendas consistently tell the story of the group coming together over time to share knowledge, work on specific outreach needs, manage donor funds, and create documentation, tools, and processes to support donor stewardship. To date, the LADS group has not provided formal training for all, but individual representatives participate in development training and share information with all LADS members. Because LADS arose in response to resource limitations, the library does not have an expected time commitment for representatives, aside from attending meetings as available and meeting existing donor support demands.

Specific outreach projects include creating donor-center newsletters for both archives & special collections and the main library, participating in the yearly university-wide day of giving, and hosting donor-related events. Considerable effort has been made to develop systems and workflows to meet immediate needs and continue to lay the groundwork for the eventual hiring of development staff. Some examples of that have been getting access to donor records and creating a process for thanking supporters for gifts; making endowment, spending, and reinvestment decisions; and creating a comprehensive Excel workbook listing all donor accounts, with names, purpose, endowed amount, spendable balances, signatory

responsibilities, and staff stewardship contacts for each account. While the Foundation maintains donor accounts and details, the information is within their system which by design, few people in the library have access to in an effort to maintain the confidentiality of donor information. It is also a system that does not present information in a way that is easily usable for LADS. The internal spreadsheet utilizes non-confidential information from the Foundation's records to present an easier to digest and operationalize version without having to increase access to their system of sensitive information. The LADS group uses this workbook when discussing project funding, potential donor or stewardship activities, and is a convenient resource for reviewing the status of any single account and for compiling data on accounts overall. All of these will be invaluable resources for new development staff.

Current Status

Recognizing the library would need to prepare to onboard a new development officer, and in preparation for the upcoming capital campaign, the dean recently led the LADS group in a process to write case studies. The primary goal for the case studies is to provide concrete donor requests with context to orient a development officer, foundation representatives, and prospective donors to funding areas and projects within the library. Additionally, these studies provide all library staff with a shared understanding of our fundraising goals. The development of the case studies was a collaborative effort within LADS. The members began by brainstorming core areas and themes and then divided into subgroups to reach out to other stakeholders in the organization and tackle writing the different cases. Over 2023 and early 2024, LADS held two writing retreats to finalize the first set of case studies which has resulted in 15 case studies. To continue to engage the full organization, LADS sent them to all library staff, with a request for others to contribute new case studies, to create a growing collection of resources.

The 15 case studies are comprehensive and span multiple areas of the library. For example, one is focused on providing funding for advancing student engagement and success through enhancing library spaces, supporting the growth of collections and technology, and providing salary support for staff positions for student success. Another case study is to endow the library dean position to allow for those funds to be used for increasing staff lines. Since student workers are critical to our organization, and the value we place on providing a robust learning experience, there is a case study to build an endowment to fund student workers in Archives & Special Collections. These studies are specifically written to be brief, at around 150 words, to provide an easy-to-read synopsis. Additionally, they can be mapped back to both UConn and library values and strategic directions, representing our continued commitment to engaging with the institutional and organizational values and needs, as well as connecting to donor engagement as a means for support. With the first set of case studies now finalized, the LADS group will continue to develop the writing process to support donor development. The LADS group expects to regularly review the case studies to make updates, add new, and remove any that are fully funded. In the future, the LADs group may use case studies to develop

additional strategic planning around development, with future activities to be determined. The LADS group continues to meet monthly, meeting ongoing needs while also preparing for the future hiring and onboarding of development staff.

Philosophical Grounding

Since 2018, the library has focused on its mission of being the Right Library for UConn: committed to connecting the community of learners that rely on our services with the skills and expertise of the staff. Guiding and supporting this underlying mission are established values, a strategic framework, and a series of fundamental cultural behaviors for all employees to incorporate for collective growth. These philosophies and strategic directions engage the core mission of an academic library and empower staff to work within a supportive and generative environment. The work of LADS is based within the context of these philosophies.

This intention to empower staff, as found in the [strategic framework](#), directly relates to LADS and the library's current development activities; providing opportunities for staff to learn and grow their skills in donor stewardship. A significant program developed by the dean and senior leadership to create a strong culture continues to build on that connection. Recognizing the truth of the often quoted "culture eats strategy for breakfast" (incorrectly attributed to Peter Drucker), the Cultural Behavior Program based on a book by David Friedman called [Culture by Design](#), builds an internal base to support staff growth and awareness of interpersonal interactions; this in turn enforces the work necessary fulfill the mission to become the right library for UConn. The program, which recently completed the first round of a continuous program to ritualize the behaviors, is creating the positive and productive culture of shared responsibility necessary for a successful disbursed development program and in supporting future development staff.

These philosophies have also resulted in some significant changes to services focused on our external audience, most notably the Future of Journals project which addresses critical budget issues facing the UConn Library. The Future of Journals, entering the fifth year, has engaged library staff and the UConn community in reevaluating how to effectively deliver journal articles by cancelling pricey bundled subscriptions and implementing alternative means of accessing scholarly information that provides access at the point of need instead of just in case. The Future of Journals not only enables us to manage our budget so that we can build collections that reflect the needs of our faculty and students, but to free up the funds necessary for other vital needs including a development officer.

As explained in articles like Dan Park's "How to lead with courage in difficult times," which stems from *The Chronicle of Higher Education's* online briefing in 2022 *Leading Courageously in Unparalleled Times*, development professionals are facing ongoing concerns related to how to stay productive and relevant in a changed world (2022), and as budgets at higher education institutions continue to decrease, the expectations placed on increasing donor funding through development work will continue to grow. Knowing that development officers

face similar struggles coupled with so many changes following the pandemic, including more digital interactions (including digital donor visits and virtual events, increasing inflation, and a challenge to raise philanthropy goals in every sector, the base the UConn Library is building through LADS will serve to continue to meet the immediate needs of the organization and improve the onboarding of a new development officer.

Conclusion: Positioned for the Future

Although optimally, development and stewardship benefits from having dedicated, professional, development staff, the UConn Library's LADS team presents an example of how to continue supporting development goals through a dispersed model while preparing for hiring a new development officer. By bringing a diverse cross-section of staff from across the library to serve on the LADS group, the library reinforces the importance of development as an activity where everyone in the library can play a role and contribute. Despite the progress the team has made on supporting development, there are still challenges that are difficult to overcome with the model. The lack of a dedicated development officer embedded in the work of the Foundation does not allow for access to conversations and regular support from the main development office. Most notably this limits our ability to identify new potential donors, for inclusion in other development activities that may be beneficial and engaging in strategies and collaborations with other development officers. We are also challenged by what is often the case in cross-functional teams in that the work is in addition to other job responsibilities, limiting time and the ability for staff to fully engage.

As of today, the UConn Library continues to have a development support position on its strategic hiring wish list, and the UConn Foundation has made multiple recent hires. After some time to allow the new staff to acclimate to UConn, we will invite them to a LADS meeting to discuss how we can collaborate. Until then, the LADS group is looking forward to continuing to provide development and stewardship support and setting the foundation for collaborating with a new development officer.

References

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