In 2012, we celebrated a significant milestone—the dynamic, vital partnership of the University of Wyoming Foundation and its university turned 50, and we have you to thank. The loyalty, generosity, and enthusiasm of our many donors, friends, and alumni continue to ensure the success of Wyoming’s students.

We are fifty years old, but the 1990s began the modern era of philanthropy at the University of Wyoming. Our fundraising programs—and hence our university—have been transformed by private engagement, public state matching funds, and the exponentially increasing generosity of donors and friends.

This year has been no exception. Private giving for the fiscal year ending June 30, 2012, totaled $40.1 million from 23,551 corporate, foundation, and individual donors. It is another milestone, the second year in a row—and the first time in UW history—that the UW Foundation has raised over $40 million in private support in two consecutive years.

Thanks to unprecedented scholarship and program support, including Hathaway, our students are not just surviving—they’re thriving. The expectations for our students, faculty, and programs continue to rise, as they do for ourselves. Private giving continues to reach unprecedented levels, and assets managed by the foundation have grown significantly over the years, allowing donors to support an expanding number of students, faculty, and academic programs during times when many universities have had to cut back. Our greatest era continues at the University of Wyoming.

We are profoundly grateful to all those who have invested in the future of the University of Wyoming. It’s your continued support that launches us confidently into the future.
We’ve come so far—thanks to you, our loyal and enthusiastic alumni, donors, and friends. The strategic partnership of University of Wyoming Foundation and the University of Wyoming has reached the half-century mark.

On April 19, 1962, UW President George Duke Humphrey, VP of Finance Elliott G. Hays, and Coordinator of the Building Program Lawrence G. Meeboer formalized the fundraising efforts of the University of Wyoming Foundation by signing its certificate of incorporation.

Our mission was and is “to promote, assist and extend financial support to the University of Wyoming and its various educational programs and other services, and to provide scholarships, fellowships and similar grants-in-aid to students enrolled in the University of Wyoming.”

Fast forward to 1982, when the UW Foundation raised approximately $2 million with a staff of just five and a total endowment of almost $29 million.

Then in 2002, in the middle of the 5-year DISTINCTION Campaign, 34 staff—assisted by 7 part-time-development staff and 8 campus liaisons—raised $20.3 million, in addition to state matching funds of $17 million, with a total endowment of $130 million.

Now, in FY 2012 with a staff of 44, private giving to UW totaled $40.1 million from 23,551 contributors. UW’s giving total includes $11.5 million in estate gifts and over $5 million in annual giving. Support for Wyoming Public Radio and the Cowboy Joe Club are accounted for in this total. The university’s endowment now totals $325 million.

In FY 2012, key gifts were received from Ultra Petroleum (for energy), Baker Hughes (energy), Marathon (energy), the Watt Foundation (literacy), the Ellbogen Foundation (literacy and teaching center), the McMurry Foundation (nursing), Harry Konkel (scholarships), Marvin Millgate (Academic Affairs), and the Rentschler family (arts).

This is the first time in UW history that private giving exceeded $40 million for two consecutive years. The first time private giving exceeded $40 million was in 2008.

The modern era of philanthropy at the University of Wyoming—more donors giving larger gifts to support something they so strongly believe in—was set in motion in the 1990s and has only
continued to grow and to transform Wyoming's university.

To put it in perspective, one measure of the successful growth in fundraising is the gift of $1 million or larger. From the university's founding in 1886 up to 1990, there were only three gifts of $1 million or more. Between 1990 and 1996, there were eight gifts of this size. Since 1996, there have been more than 100 gifts of over $1 million.

The 5-year DISTINCTION Campaign was launched in 2000 with an initial goal of $125 million. At its conclusion in 2005, the campaign achieved $204 million in private support and state funding.

State matching funds have been an unqualified success. In 2001, the State of Wyoming began a “matching funds” program that initially matched endowment gifts of $50,000 or more and was later expanded to match facilities gifts of $25,000 or more. In 2001, the first round of state matching dollars totaled $30 million, which led to numerous subsequent allocations. To date, the State has provided a total of $200.2 million in matching funds to enhance UW’s private support programs, $152.7 million of which have been secured with qualifying matching gifts.

UW’s fundraising focuses on UW’s major private giving initiatives and assigns energies to priorities that have the most potential to generate support among the university’s many dedicated alumni, friends, corporate partners, and foundation donors. These priorities are also representative of the ongoing strategic partnership among UW, the State, and the UW Foundation. They are established by the university president in collaboration with the provost and in consultation with deans, directors, faculty, and UW Foundation staff and are endorsed by the UW Board of Trustees.

We continue to enhance our stature as an internationally recognized institution of higher education and research. For example, the NCAR-Wyoming Supercomputing Center came online, with seven UW research projects chosen for its first cycle. On the UW campus, Mount Moran—the Advanced Research Computing Center—provides further high-performance computing power. As a result, Wyoming ranks among the world’s finest in sheer computing power.

Our campus continues its sophisticated transformation in other ways. This past year, construction was completed on the Visual Arts Facility, Bison Run Village student housing, and Sullivan Plaza near the College of Education, and construction of the School of Energy Resources Energy Innovation Center and renovation of the Geological Museum is underway. Projects in the design phase include Half Acre Gymnasium, Fine and Performing Arts, the Michael B. Enzi STEM Laboratory (for science, technology, engineering, and mathematics), and the Literacy Research Center and Clinic.
Last, but certainly not least, on the horizon is the Marian H. Rochelle Gateway Center, a gathering and welcoming space for students, alums, and other UW visitors that also tells the remarkable story of UW. It will embody the dynamic partnership between the UW Foundation and the University of Wyoming and is emblematic of how far we’ve come as a development organization and a university.

When UW’s future students visit campus for the first time, the Rochelle Gateway Center will be there to welcome them. It will provide meeting and event space for current students. As students approach graduation, they will meet with prospective employers in its professional state-of-the-art conference rooms. The center will once again welcome them, supplying event space and providing recognition, as returning alumni, volunteers, mentors, and donors. In their professional life, alums will also be able to connect their corporations and foundations with their university.

In short, the Marian H. Rochelle Gateway Center will support students throughout their lifetime connection with Wyoming’s university, a place alums will always be able to call home.

Our expectations have grown with our organization. Just as we expect students to continue to excel and faculty to do their best teaching and perform world-class research and the university itself to be one of the nation’s finest public land-grant research universities, so too we strive to fulfill the trust you—our donors, alumni, and friends—have placed in us.

It is our job to “enhance excellence and distinction at the University of Wyoming by securing private resources, delivering superior stewardship, and creating enduring relationships with all who share our pride in Wyoming’s university.” It is a job we take very seriously, one that we perform with enthusiasm and pride.

The UW Foundation looks forward to another half-century of supporting the University of Wyoming as it aspires to be one of the nation’s finest public land-grant research universities.

When UW’s future students visit campus for the first time, the Rochelle Gateway Center will be there to welcome them.
We are fifty years old, but the 1990s began the modern era of philanthropy at the University of Wyoming. Our fundraising programs—and hence our university—have been transformed by private engagement, public state matching funds, and the exponentially increasing generosity of donors and friends.

**GIVING TOTAL**
- FY 1997: $6,180,373
- FY 2012: $40,119,448

**ENDOWMENT VALUE HISTORY**
- FY 1997: $105 million
- FY 2012: $325 million

**ENDOWMENTS UNDER MANAGEMENT**
- FY 1997: 488
- FY 2012: 1,234

**TOTAL FOUNDATION ASSETS**
- FY 1997: $50.6 million
- FY 2012: $445.6 million

**DONORS**
- FY 1997: 15,648
- FY 2012: 23,552
1962 to 1970
Dick Brown, Assistant to the President for Alumni Relations, Development, and Information

1971 to 1975
Alex McGaw, Assistant to the President for Development

1975 to 1985
Jerry Hollon, Executive Director of the UW Foundation; Assistant to the President for Development

1972
University Development Committee established

1980s
Established priorities for fundraising

1982
The university designates the foundation as its primary private fundraising organization

1984
UW Foundation moves into the Guthrie Home; Guthrie Home expanded

April 24, 1962
UW Foundation incorporated

1985 to 1986, 1987 to 1996
Pete Simpson, VP for Development and Executive Director of the UW Foundation; VP for Development and Alumni Affairs; VP for Institutional Advancement
1886 to 1990
Centennial Capital Campaign, celebrating the university’s first 100 years

1990 to 1996
Eight gifts of $1 million or greater

1996 to present
More than 100 gifts of $1 million or greater

2000 to 2005
DISTINCTION Campaign, a five-year effort with a goal of $125 million that actually raised $204 million

2001 to 2011
State matching funds program that encourages private donations (endowment gifts of at least $50,000 and facilities gifts of at least $25,000)

2008
Private giving exceeds $40 million

2009
Launch of WyoAlumni, the online home for all UW friends, alumni, and supporters

2011
Establishment of Foundation Resource Center, a resource for faculty and staff for researching and approaching private foundations for funding

2014
The Marian H. Rochelle Gateway Center scheduled for completion
Whether a bright-eyed future UW student is visiting campus, a dedicated current student is interviewing with prospective employers, or a worldly wise former student is reliving old college memories, there will soon be a place on campus where they will forever be welcome.

Students will always have a place to call home at the Marian H. Rochelle Gateway Center, a dramatic state-of-the-art welcoming center funded entirely through private support.

Located on the corner of 22nd and Grand Avenue near War Memorial Stadium, the 60,000-plus-square-foot Marian H. Rochelle Gateway Center will be a multi-use location with an advanced technological infrastructure, small and large meeting rooms, and public and social event spaces. It will be a place for future students and families to enter the university, for gatherings of current students, for alumni to arrive and celebrate the history and traditions of their alma mater, for friends to participate in the university’s programs, and for corporations and organizations to interview and recruit UW students.

Surrounded by a dramatic three-story wall of windows, the Marian H. Rochelle Gateway Center’s McMurry Family Grand Atrium will proudly welcome visitors as UW’s front door, functioning as the central hub. With its wide-open welcoming aesthetics and prominent university displays and exhibits, it will serve as a gathering place and event space for students, alumni, prospective employers, industry leaders, and all of UW’s other internal and external constituencies.

The McMurry Family UW Legacy Hall will be the most visited space in the new building, creating an interactive experience that honors the impact of UW on Wyoming, the renowned alumni and friends who have supported Wyoming’s university, and the noteworthy traditions of the institution. It will tell the story of the University of Wyoming—from the founding in 1886 through its vibrant present and on into the institution’s bright future—through museum-quality space and dynamic and flexible visuals, including video and digital displays. Within these spaces, the impact of Wyoming’s energy industry in advancing Wyoming and UW will also be celebrated in a permanent exhibition.

The project is a partnership among the university’s Foundation, Alumni Association, Center for Advising and Career Services, and Admissions and will contain office and collaborative space for these units as they support and promote the university.
It will also install pride in UW’s students, alumni, faculty, staff, and visitors, who will know immediately that they are entering the gateway to a remarkable university—a fitting way to commemorate 50 years of vital strategic partnership between the UW Foundation and the University of Wyoming.

The Marian H. Rochelle Gateway Center is funded completely through private support—including historical gifts from philanthropists Marian Rochelle ($10 million) and Mick and Susie McMurry through the McMurry Foundation ($6 million).

Plans for the Marian H. Rochelle Gateway Center project began in 2008 and are featured prominently in the university’s long range development plan. It has since expanded to encompass all of UW’s colleges and units, visitors and friends within a premier welcoming facility. In July 2011, President Tom Buchanan and the UW Board of Trustees assembled a university facilities planning team and charged them with the direction and leadership of this project. Among its members are constituents from across campus and UW Foundation Board members Frank Mendicino, Roy Cline, Mari Ann Martin, Greg Dyekman, Chair Clayton Hartman, and Vice Chair Scott Neu.

The center is being designed by Cheyenne-based Pappas & Pappas Architects, P.C., and DLR Group, an integrated design firm with offices across the United States. The national branding firm Advent, LLC—whose high-profile projects include University of Southern California, University of Texas, and Texas Tech—will design exhibit and museum spaces in the center. The construction manager at risk is Wyoming- and Colorado-based Haselden Construction.

The university owns the future site of the facility, which now holds a former U.S. Forest Service Research Station. Construction is scheduled to begin in late spring/early summer 2013, with the facility planned to open in the fall of 2014.

To learn more about the Marian H. Rochelle Gateway Center and to see renderings of the building, go to www.uwyo.edu/gatewaycenter.
Hess has been using technology to serve its customers and create value since the company began in the 1930s.

That’s when 19-year-old Leon Hess of Asbury Park, New Jersey, bought a second-hand oil delivery truck and then installed heaters to warm and thin the heavy industrial oil. This allowed it to flow more easily, which sped up delivery and enabled Leon to serve more customers more quickly.

Technological ingenuity has played a role in each stage of the company’s growth—from exploration of oil fields to building pipelines, from deepwater and horizontal drilling to terminal delivery and asset optimization.

Hess has made an incredible $4.4 million investment in UW, which will be doubled by $4.4 million in state matching funds, for a Nano Resolution Imaging Laboratory.

The University of Wyoming School of Energy Resources, with Dr. Mohammad Piri, has established a program to investigate the flow of oil and gas through tight shale and sandstone at macro, micro, and nano scales. The macro- and micro-scale laboratories are in place, and Hess’s contribution supports the nano-scale laboratory with the purchase of a nano CT scanner and electron microscope, among other things. The state matching portion will build the Energy Engineering Research Facility that will house this research, which is the subject of a governor’s task force.

“The partnership with Hess represents an outstanding achievement for UW,” says Mark Northam, Director of the School of Energy Resources. “Hess is a clear leader in applying technology to develop unconventional reservoirs. We are honored that they chose UW to collaborate with in creating fundamental understanding about how fluids move through tight rocks. This collaboration signals a bright future for UW and for Hess.”

Hess recognizes that consistent and cutting edge technology solutions and continuous process improvement are fundamentally important to their business, including more effective exploitation of unconventional reservoirs. The company devoted $2.5 billion in unconventional reservoir research and development in 2010 alone.

Why UW? Because the University of Wyoming is on the leading edge of research into unconventional reservoirs, which has the potential to make huge advances in energy production. Because UW’s dedicated research teams are interdisciplinary, which allows for real breakthroughs in technology. Because the State of Wyoming also supports and invests in its university and energy research. Because UW is committed to public-private partnerships like Hess’s that advance our shared energy future.
How can you tell if a child will do well in school?

One of the most important indicators of student success is whether they can read at a proficient level by the end of third grade. Only 33 percent of Wyoming third graders are proficient in reading, while the national number is only 31 percent.

These numbers need to improve, and answering the call is the University of Wyoming Literacy Research Center and Clinic. Opening in 2013, its mission will be to serve as the epicenter of literacy expertise in the state—to improve the quality of literacy learning, literacy instruction, and literacy leadership for all Wyoming children birth through high school.

Designed by The Design Studio of Cheyenne, the center will be located on the first floor of the UW College of Education Annex. It will contain a family literacy area, six diagnostic and tutorial rooms connected to provide digital video and audio, two large seminar spaces with state-of-the-art distance technology, graduate research space, and offices for faculty and staff.

Through partnerships with public and private schools and community-based organizations, center staff will help with clinics and professional development both on campus and across the state using state-of-the-art distance technologies. It will also sponsor applied research projects.

The literacy initiative is reaching its stride, not least of all with significant fundraising support. The College of Education received lead gifts for facility renovation from Mickey and Jeanne Klein, the Joe and Arlene Watt Foundation, Thea Stidum, and Don and Betty Walters. Ongoing support for center activities—such as graduate student support and travel funds for faculty and families served—comes from the John P. Ellbogen Foundation.

The initiative is also receiving significant support from the State. First Lady Carol Mead has lent a hand in getting the word out, and gifts were doubled by state matching funds. In addition, the State supports two Wyoming Excellence in Higher Education Endowed Chairs in Literacy Education, which are occupied by Victoria Gillis and George Kamberelis.

These endowed chairs will serve as co-directors of the center. Gillis previously taught middle and high school science for 20 years and directed a literacy center in South Carolina. Kamberelis was a professor at SUNY Albany before coming to UW, bringing with him a deep expertise in early and family literacy.

This university center presents a new paradigm for literacy research and outreach. There are other literacy centers across the nation, but they are either grant-funded research-only university organizations or clinic-only centers associated strictly with schools without the professional development component.

Kay Persichitte, Dean of the UW College of Education, comments, “We are so grateful that this public-private partnership will allow our faculty to connect directly with Wyoming children and teachers through their service efforts, outreach, and research in ways that have been impossible given constraints of distance and physical presence. ‘Reading to Learn and Learning to Read’ continues to ground our literacy education efforts.”

The UW Literacy Research Center and Clinic brings it all together—so children can thrive.
Marvin Millgate of Torrington graduated from UW in 1952, served in the U.S. Army, and spent his working life as a geologist for the Atomic Energy Commission and the U.S. Geological Survey. Then, in the late 90s, he thought about his retirement.

He decided to establish two charitable remainder unitrusts (also known as CRUTs) funded with land that he owned in Goshen County. The University of Wyoming Foundation received the gift of land as the Trustee of the CRUTs and quickly developed a plan to sell the property.

The sale of his land in 2003 brought an unexpected surprise. There had been an initial appraisal, but then input from expertise on the UW Foundation Board of Directors indicated that the land was undervalued, and so a new appraisal raised that value by a significant amount. The land was sold during a live auction, and it brought an even higher sum. The proceeds received by the CRUTs upon the sale of the land were invested in a diversified portfolio, which provided Marvin a reliable stream of income during his retirement years.

Marvin’s gift also triggered a state match when the land was sold. The endowment payout from the state matching component has been utilized to make a significant impact across campus since the beginning of 2004—to send faculty and staff to conferences, to develop faculty internship programs, and for leadership development among deans and department heads.

The generous Mr. Millgate passed away on January 6, 2012, leaving his entire estate and the remaining assets in the two CRUTs to the University of Wyoming to be utilized by the Vice President for Academic Affairs for academic enhancements across campus. The remaining assets of the two CRUTs, when combined with the assets of his estate and the Wyoming state matching funds, represent a remarkable gift to UW in excess of $3.5 million that will significantly enhance academics and professional development for the rising stars of UW’s faculty.

“UW’s Office of Academic Affairs has dedicated Mr. Millgate’s gift to the development of the next generation of academic leaders at UW,” says Dr. Myron Allen, Provost and Vice President for Academic Affairs. “Through his extraordinary generosity, we hope to cultivate a steady stream of capable department heads, deans, and vice presidents. Some will come to UW from other institutions, but I hope that many of the most talented teachers and scholars in our own ranks will feel ready to step into these roles in the coming years.”
People are drawn to the American West, and the West draws people together.

In 1881, painter Henry Farney came West to the Dakota Territory to visit the Standing Rock Sioux Reservation. What became of that trip and others was a lifelong passion for painting Native American subjects.

In the middle of the last century, industrialist George Rentschler of Ohio spent many hunting seasons in Wyoming’s Powder River Basin. He had a passion for western subjects and collected the paintings of Henry Farney and hung them in his library.

In the mid-1950s, George’s son Fred spent a high school summer doing work on a ranch near Encampment. He loved it so much, later in life he and his wife Pam bought a ranch in the Madison Valley of Montana.

In 1957, Gene Gressley was Director of the University of Wyoming American Heritage Center, which collects archival material of the American West. Gene heard of the Rentschlers’ western art collection and contacted the Rentschler family.

And then, thanks to the generosity of the Rentschler family, that exquisitely beautiful library from Fairfield, Ohio—with its priceless western artwork—itself moved out West in 1980, complete with raised ceiling, rug and curtains, and wood paneling. It was located first in the W.R. Coe Library and then, upon its completion in 1993, in the Centennial Complex.

The George A. Rentschler Room at the American Heritage Center features nine paintings by Henry Farney, as well as one by Frederic Remington. Last year, four more Farneys were gifted to the AHC, thanks to Fred and Pam Rentschler. The Rentschler Room artwork, along with that in the Alfred Jacob Miller Classroom, constitutes the University of Wyoming Collection of Western Art.

“This completion of the gift of Fred Rentschler, through the generosity of Pamela Rentschler, puts the finishing touches on what is easily the most impressive room at UW,” say Mark Greene, Director of the American Heritage Center. “The George Rentschler Room contains a remarkable collection of Farney and Remington paintings, as well as a re-creation of Mr. Rentschler’s New York study. The entire Rentschler family have been remarkable benefactors to the university and to the American Heritage Center.”

Thanks to the generosity of one family and their passion for the West that the University of Wyoming is able to display such iconic images.
DR. MATTHEW CAVALLI
Matthew Cavalli, a Wyoming native, received his bachelor's in mechanical engineering at UW and went on to get his doctorate at the University of Michigan. Now chair of the mechanical engineering department at the University of North Dakota, Cavalli has consistently given back to his Wyoming alma mater for the past 13 years.

“The personal and professional development I experienced at UW provided an excellent foundation for further achievement. I am happy to support UW’s continuing dedication to graduate outstanding engineers and educated citizens.”

DEBRA THATCHER
Debra Thatcher is Provost and VP for Academic Affairs at SUNY Cobleskill. She began her career at UW, receiving her bachelor's in elementary education in 1980, and now she regularly gives back to her alma mater through annual giving.

“My experiences at the University of Wyoming planted the seeds for a lifetime of adventure and professional opportunities. Giving back through the annual fund is a small thing I can do to say thanks, and I encourage other alums to make a difference with their own gifts, large or small.”

BERNARD J. (B.J.) SULLIVAN II
A member of the iconic Wyoming Sullivan family, Bernard J. (B.J.) Sullivan II has been a President's Society member for 10 years through his annual giving to the College of Engineering. Sullivan is a 1971 UW graduate in civil engineering, and he is president of Clark & Sullivan Construction. Clark & Sullivan Construction recently opened an office in Laramie.

“I have a great love for Wyoming and the University of Wyoming. I received an outstanding education from the Engineering College and this is a small way to say thank you to this wonderful institution.”
Over the years, UW alumni and friends and the Wyoming State Legislature have consistently and enthusiastically supported Wyoming’s university. They have established unprecedented numbers of endowments—from scholarships to professorships, from program support to facilities construction. It is through private support that the University of Wyoming rises above the ordinary to become one of the nation’s finest public land-grant universities, and the University of Wyoming Foundation exemplifies the university’s private-public partnership.

ENDOWMENTS
Every year, in accordance with its payout policy, the UW Foundation distributes millions of dollars from its endowment to the university for expenditures such as student assistance, faculty support, library acquisitions, academic program support, and building and equipment purchases and maintenance. Endowments are conduits that allow yesterday’s students to impact the lives of the students of today and tomorrow. They provide a firm foundation of assets that are held in perpetuity, the interest of which creates a steady stream of funding for those purposes chosen by the donor. This reliable income allows the university to plan and budget effectively, but most importantly it helps students achieve their educational goals, sending them down the path to success.

The UW Foundation uses a weighted formula for calculating payout amounts. The payout policy is the result of a careful review of models used by Yale, Stanford, and other major higher education institutions and is designed to smooth year-to-year variations in market performance so that the colleges and units within the university are able to budget more accurately with a predictable and reliable source of funding.

When a donor creates an endowed fund, the gift buys shares—much like mutual funds—in the endowment pool. Adding these funds to the endowment pool broadens investment possibilities much more than if each endowment were invested individually. Accounting, however, is done separately for each fund, and based upon the number of shares owned in the pool, income is distributed after an initial one-year waiting period.

Endowment distributions may be made from current income, accumulated income, realized appreciation, and principal to the extent necessary to meet the distribution requirements of the payout policy. Earnings above the amount of distributions are added to the corpus, enabling the principal to continue to grow and providing a hedge against inflation.

For FY 2012, the number of endowments reached 1,234 funds with disbursements, including expendable gifts, of $15.4 million to the university. As of June 30, 2012, the pooled fund had grown to $316.1 million.
FINANCIAL REPORT FOR FY 2012

SOURCE OF DOLLARS RECEIVED
FY 2012 Giving Total: $40,119,448

- Individuals: $26,929,123 (67.12%)
- Corporations: $9,509,261 (23.70%)
- Foundations: $3,503,228 (8.73%)
- Other Organizations: $177,836 (0.44%)

NUMBER OF ENDOWMENTS

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<th>Year</th>
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IN MILLIONS DISBURSEMENTS TO UW

- FY08: $16.3
- FY09: $13.7
- FY10: $31.6
- FY11: $26.4
- FY12: $15.4
IN MILLIONS ASSET ALLOCATION
AS OF JUNE 30, 2012

- 11.4% Large Cap Equity $36.0
- 2.2% Small Cap Equity $7.0
- 6.3% International Equity $20.0
- 6.5% Fixed Income $20.7
- 28.7% Absolute Return $90.6
- 13.5% Hedged Equity $42.5
- 19.6% Private Equity $62.0
- 9.6% Real Assets $30.3
- 2.0% Cash $6.5
- 0.1% Liquidating Funds $0.5

FY 2012 TOTAL: $316.1 MILLION
INVESTMENTS

A primary mission of the University of Wyoming Foundation is to exercise superior stewardship of the gifts committed to the university, and assets managed by the foundation have grown significantly over the years and have allowed donors to support an expanding number of students, faculty, and academic programs during times when many universities have had to cut back. Funds invested by the foundation include cash, reserve balances, charitable remainder unitrusts and gift annuities, outright gifts, and endowments.

Now more than ever, well-balanced asset allocations have been shown to consistently perform better over time under varying market conditions, rather than being heavily invested in one or two asset classes or trying to time the market. The UW Foundation portfolio is broadly diversified, and the board continues to proactively manage the assets to balance stability with rate of return. The use of a sophisticated asset allocation typical of much larger institutions has resulted in more secure foundation holdings that are not unduly influenced by the highs and lows of the equity and bond markets or changes in the political climate.

The UW Foundation Board of Directors—in consultation with their professional investment advisors Monticello Associates of Denver, Colorado—work diligently to proactively manage the foundation’s portfolio. UW Foundation staff and board members combine diverse areas of expertise to bring a wealth of financial experience to the management of the foundation’s investments. The foundation attempts to achieve a balance between current requirements and future needs—to provide a stable and growing income stream to UW while preserving the purchasing power of the endowment assets.

With Monticello’s input, the board hires investment managers whose portfolios fit within the foundation’s investment strategy of long-term growth and minimizing risk versus reward. The risk, return, and correlation characteristics of the alternative asset classes provide greater portfolio diversification and stability because of their low correlations to the traditional fixed income and equity asset classes.

As of June 30, 2012, the pool of endowed funds totaled $316.1 million.

But, at the end of the year, the bottom line is not the whole story. This number does not include the many services the UW Foundation provides—such as serving as a charitable planning resource and reconnecting the alumni and friends of Wyoming with their university—nor the ways that the foundation actively stewards donors’ contributions before they become endowments, including pledges, short-term investments, and real estate. The commitment of UW’s alumni and friends has made UW the envy of many other institutions. Over the years, the UW Foundation’s assets, which support the dreams of tomorrow’s citizens and leaders, have grown significantly, and this fundraising success stands as a testament to the dedication and generosity of UW’s avid supporters.

STATE MATCH

Many of UW’s key gifts were doubled through the state’s matching program. This program, unique to the State of Wyoming, began in March 2001 with the mission of providing additional support to the University of Wyoming by encouraging private donations. Under this program, endowment gifts of at least $50,000 and facilities gifts of at least $25,000 were matched dollar for dollar.
NEW ENDOWMENTS FOR FY 2012

EXCELLENCE IN ACADEMICS

Anthony G. and Barbara F. Andrikopoulos Business Excellence Fund
Established by Anthony and Barbara Andrikopoulos to foster excellence in business education

H. Allan and Maxine A. Fulton Business Excellence Fund
Established by H. Allan and Maxine A. Fulton to help create business education excellence

International Studies Internship and Research Excellence Fund
Established by John P. Ellbogen Foundation to bring focus to international student research/internship activities

FACULTY SUPPORT

Knape Family Clinical Laboratory Science Fund
Established by William A. and Charlene C. Knape to support the Clinical Laboratory Science Program in Health Sciences

Wildlife/Livestock Health Center Endowment
Established by various donors to support the veterinary diagnostic laboratory in studying diseases

STUDENT SUPPORT

Dr. Herbert G. Fisser Graduate Fellowship
Established by George R. O’Connor in memory of Dr. Herbert G. Fisser to support graduate student research in Renewable Resources

Harry Wagner Konkel Fund for Teton County Students
Established by Harry Wagner Konkel to support undergraduate and graduate students at UW who are residents of Teton County, Wyoming, or are graduates of a high school located in Teton County, Wyoming

James L. Huemoeller Book Fund
Established by family and friends in memory of James L. Huemoeller to support law students in the purchase of textbooks

Jane Fenimore Scholarship in Cello Performance
Established by family and friends in memory of Jane Fenimore to support students studying cello

Jason C. Reher Memorial Fund
Established by Dr. Charles and Mrs. Sandra Reher in memory of Jason C. Reher to support archeological research activities

Kepler Fund for Professional Education
Established by Charles and Ursula Kepler to support clinical and other experiential education programs

Kosman Family Scholarship Fund
Established by H. Hod Kosman to support students enrolled in the College of Business and the Haub School of Environment and Natural Resources

Ksir Research Fellowship
Established by Charles Ksir to support student research in Psychology
### NEW ENDOWMENTS FOR FY 2012

<table>
<thead>
<tr>
<th>Fund Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>McMurry Fellowship in Energy Research</td>
<td>Established by the McMurry Foundation to support graduate students conducting energy-related research</td>
</tr>
<tr>
<td>Robert “Bob” B. Rhynsburger Men’s Basketball Excellence Fund</td>
<td>Established by Robert B. Rhynsburger to encourage excellence in the UW Men’s Basketball Program</td>
</tr>
<tr>
<td>Arts &amp; Sciences Endowment for the Arts</td>
<td>Established by Roy Shlemon to enhance special projects related to the Arts</td>
</tr>
<tr>
<td>Douglas B. Reeves Literacy Conference Scholarship Fund</td>
<td>Established by Douglas Reeves to further literacy in Wyoming</td>
</tr>
<tr>
<td>John P. Ellbogen Excellence Fund in Entrepreneurship and New Ventures</td>
<td>Established by John P. Ellbogen Foundation to support entrepreneurism and new business ventures in Wyoming</td>
</tr>
<tr>
<td>John P. Ellbogen Foundation Community Outreach and Partnership Fund in Literacy</td>
<td>Established by the John P. Ellbogen Foundation to enhance literacy outreach by UW</td>
</tr>
<tr>
<td>John P. Ellbogen Foundation Graduate Fellowship in Literacy</td>
<td>Established by the John P. Ellbogen Foundation to advance literacy education in Wyoming</td>
</tr>
<tr>
<td>Popular Reading Collection Endowment</td>
<td>Established by Carol McMurry and Patrick Spieles to encourage recreational reading and literacy</td>
</tr>
<tr>
<td>WGA (Wyoming Geographic Alliance) Fund</td>
<td>Established by various donors to promote geography education in Wyoming</td>
</tr>
<tr>
<td>Ellbogen Foundation College of Law Center for International Human Rights Law and Advocacy</td>
<td>Established by John P. Ellbogen Foundation to support the Center for International Human Rights Law and Advocacy</td>
</tr>
<tr>
<td>Oscar C. Schwiering Literacy Resource and Technology Endowment</td>
<td>Established by William H. Schwiering to support the UW Literacy Research Center and Clinic</td>
</tr>
</tbody>
</table>
INSTITUTIONAL FUNDRAISING PRIORITIES

The University of Wyoming Institutional Fundraising Priorities are an outline to ensure focus on UW’s major private giving initiatives and assign energies to priorities that have the most potential to generate support among the university’s many dedicated alumni, friends, corporate partners, and foundation donors.

UW Institutional Fundraising Priorities are established by the university president in collaboration with the provost and in consultation with deans, directors, faculty, and UW Foundation staff. They are endorsed by the University of Wyoming Board of Trustees.

The priorities are representative of the ongoing strategic partnership between the University of Wyoming, the State of Wyoming, and the University of Wyoming Foundation. It is the University of Wyoming Foundation’s assignment to define and implement plans to fund these priorities through philanthropic programs while optimizing the remarkable impact of state support and employing the significant reservoir of university talent and resources.

POWERING AND SUSTAINING THE FUTURE

College of Engineering and Applied Science Facility
This major project will be supported with $30 million in state matching funds. The programmatic development of the Engineering Complex is being guided by the Wyoming Governor’s Energy, Engineering, and STEM (science, technology, engineering, and mathematics) Integration Task Force. This major initiative will upgrade and expand the college’s facilities to meet contemporary standards (closely tied to industry) for university-based education and research, to accommodate program growth, and to attain competitive distinction as a Tier I school.

Energy Partnerships
The State of Wyoming created a new $15 million state matching program for the UW School of Energy Resources. These funds will leverage corporate partnerships to create a major new Energy Engineering Research Facility, elevating the distinction of the university’s energy programs in critical areas of strategic importance to Wyoming’s economy.

Initiatives in Environment, Natural Resources, and Biodiversity
With a recent major gift to the Haub School for Environment and Natural Resources and the establishment of a Biodiversity Institute, UW is emerging as a leader in sustaining Wyoming’s unmatched setting. Additional fundraising can support new faculty positions in this area to enhance UW’s prominence in issues critical to the future of the Rocky Mountain West.
INSTITUTIONAL FUNDRAISING PRIORITIES

EXPLORING CREATIVITY AND IMAGINATION IN THE ARTS AND HUMANITIES
Performing Arts Center
A $32.4 million renovation and expansion of the current Fine Arts facility into the new Performing Arts Center supported with significant state and university funding. The funding structure will be supported by a campaign to raise $2 million in private gifts to support this new UW arts center. This is an important private-public partnership that will strengthen arts education and engage a broader participation in the arts across the State of Wyoming.

REACHING OUT TO WYOMING AND THE NATION
Literacy Research Center and Clinic
The College of Education Literacy Research Center and Clinic will feature a comprehensive approach to improving literacy in the state and region and has the potential to become a model for addressing literacy issues nationally. The State of Wyoming, the University of Wyoming, and private donors have demonstrated a focused commitment to literacy—the foundation of education and democracy—through this endeavor.

ADVANCING ATHLETIC EXCELLENCE
Arena-Auditorium Renovation and Expansion
The State of Wyoming has set aside $10 million in athletics facilities matching funds to support a significant renovation of the Arena-Auditorium, making a substantial $20 million public and private investment that will modernize the Double A. This major project will enhance coaching and student-athlete experiences, expand practice facilities within the AA, upgrade locker rooms, provide a strength and conditioning center, significantly improve seating and fan amenities, put in place HD video and ribbon boards, and create state-of-the-art lighting and sound systems.
INSTITUTIONAL FUNDRAISING PRIORITIES

ENHANCING THE UW EXPERIENCE
University of Wyoming Marian H. Rochelle Gateway Center
The University of Wyoming Marian H. Rochelle Gateway Center is one of the university’s most prominent capital projects. It is a partnership project of the University of Wyoming Foundation, the University of Wyoming Alumni Association, the UW Center for Advising and Career Services, and UW Admissions. It will be a special destination for prospective students and families to enter the university, for alumni and friends to arrive and celebrate the history and traditions of their alma mater, and for employers to come to UW to interview and recruit the university’s students.

Estate Giving Initiatives to Support University, College, Unit, and Departmental Priorities
Estate gifts provide a strong foundation to greatly strengthen UW through private support for generations to come. UW’s planned giving programs provide an opportunity to forever change Wyoming’s university and allow for a broader group of UW alumni and friends to support the university and its programs.

ADDITIONAL UNIVERSITY PRIORITIES
• Business Initiatives and Opportunities
• Enhanced International Opportunities for University Faculty and Students
• Continued Distinction in the Field of Biodiversity and Conservation

The generous support UW receives from the State of Wyoming and its important private contributors creates a dynamic relationship between those who desire to impact people’s lives and the causes that inspire their generosity. These private-public partnerships continue to transform Wyoming’s university.
ABOUT THE UW FOUNDATION

The UW Foundation, established in 1962, is appointed by the University Board of Trustees to raise, receive, and manage private gifts to maximize support for the University of Wyoming. It is an independent, nonprofit corporation governed by a Board of Directors.

The UW Foundation Board of Directors consists of up to 30 elected voting members, six non-voting ex-officio members, and as many voting emeritus members as may be elected by the board. The UW Foundation Board meets throughout the year to guide the foundation in achieving its mission. Board members bring a wealth of experience from a broad spectrum of careers and professional and personal backgrounds.

The University of Wyoming Foundation has been a dynamic partner with the University of Wyoming for more than 50 years. Through the generosity of our many alumni and friends, the UW Foundation has raised an average of $38 million a year in private support over the past five years—money that goes to students and the faculty, staff, and programs that support them. This private support helps to make UW the best educational institution possible.

ANNUAL GIVING

Annual Giving is the only fundraising program of the university that reaches all alumni, parents, faculty, staff, and friends on a yearly basis to offer giving opportunities for direct support of UW’s colleges, departments, and programs. UW Annual Giving focuses on acquiring regular yearly contributions, thus creating a vital and dependable source of non-legislative support to help the University of Wyoming fulfill its mission of being one of the nation’s finest public land-grant research universities.

THE PRESIDENT’S SOCIETY

The President’s Society is the premier leadership giving circle for alumni, parents, faculty, staff, and friends of the University of Wyoming, and it is the flagship of the UW Annual Giving program. Individuals, households, or businesses donating $1,000 or more to the University of Wyoming on an annual basis are recognized as members of the President’s Society for the university’s fiscal year (July 1–June 30) in which the gift is received.
ABOUT THE UW FOUNDATION

COWBOY CALL
The student voice of the UW Foundation—Cowboy Call—plays a vital role in reconnecting, establishing, and maintaining relationships with alumni, parents, and friends who generously support the University of Wyoming through Annual Giving. Enthusiastic and proud UW students gather to offer University of Wyoming supporters the opportunity to share college memories, to find out what’s new on campus, and to hear about university events.

Students representing colleges campus-wide call alumni, parents, and friends of the university each year, and each year thousands of generous donors provide annual gifts to the university through Cowboy Call alone. If you would like more information, contact Candace Paradis, Director of Annual Giving, at (307) 766-3933 or candace@uwyo.edu.

CORPORATE AND FOUNDATION GIVING
Some of the most significant impacts across the University of Wyoming campus have come from the remarkable support of corporations and foundations. Student by student, corporation- and foundation-supported scholarships have built a wealth of human capital. Gifts campus-wide have built buildings, created new programs, and underwritten research that changes the world as we know it. If you would like more information, contact Chris Spooner, Senior Director of Corporate and Foundation Development, at (307) 766-5087 or cspooner@uwyo.edu.

ESTABLISHING AN ENDOWMENT
When people give a gift to the University of Wyoming, they often establish an endowment, as opposed to the funds going directly toward immediate needs. This is because an endowment is a way to extend the life of the gift and to allow colleges and units within the university to budget more accurately with a predictable and reliable source of funding. An endowment is a gift held in perpetuity and invested by the foundation. The principal remains intact while a percentage of the earned income is used to support the program or programs designated by the donor. For questions about endowments or to establish one, contact John Stark, Vice President, at (307) 766-3930 or jdstark@uwyo.edu.
ABOUT THE UW FOUNDATION

PLANNED GIVING
The UW Foundation’s gift planning staff assists donors in integrating charitable gifts into their financial, tax, and estate-planning objectives, maximizing benefits to both donors and the University of Wyoming. Planned gifts provide donors with an immediate tax deduction and other benefits such as life income, continued use of gift property, or elimination of capital gains tax.

WAYS TO INCLUDE UW IN YOUR ESTATE
- Cash
- Securities
- Real Estate
- Charitable Bequests
- Retirement Plans
- Life Insurance
- Charitable Gift Annuities
- Charitable Remainder Trusts
- Charitable Lead Trusts

THE LEGACY SOCIETY
The Legacy Society recognizes UW alumni and friends who have made an estate commitment or a deferred gift to the UW Foundation. Qualifying gifts include bequests, charitable remainder trusts, charitable gift annuities, life estates, retirement plan assets, charitable lead trusts, and life insurance policies. Benefits include invitations to events, the biannual Cowboy Legacy newsletter, a Legacy Society lapel pin, and recognition (unless you prefer to remain anonymous). If you are considering UW in your estate plans or have questions, contact Tracy Richardson, Director of Planned Giving, at (307) 766-3934 or trichar6@uwyo.edu.

OTHER AREAS OF IMPACT WITHIN THE UW FOUNDATION
Our institutional advancement and fundraising efforts are responsibly and effectively implemented by many qualified individuals within the UW Foundation. The areas of advancement operations, donor relations, event planning, financial services, gift processing, prospect management and research, stewardship, and marketing support the UW Foundation’s work on behalf of the University of Wyoming.

In practicing our guiding principles, the UW Foundation will strive to earn the trust and mutual respect of our peers and constituent partners while inspiring exceptional pride in the University of Wyoming.
VISION, MISSION, & CORE VALUES

VISION STATEMENT
The UW Foundation aspires to be a premier strategic partner with the University of Wyoming in achieving its desire to become the nation’s finest land-grant university.

MISSION STATEMENT
The UW Foundation enhances excellence and distinction at the University of Wyoming by securing private resources, delivering superior stewardship, and creating enduring relationships with all who share our pride in Wyoming’s university.

CORE VALUES
The UW Foundation seeks to set the highest performance standards in the following areas, which we consider essential to the successful achievement of our mission and attainment of our vision.

- **Accountability**: Faithfully steward the resources entrusted to us while maintaining transparency in all aspects of our management of these resources.
- **Integrity**: Demand the highest standards of professional conduct, acting at all times with truthfulness and integrity and adherence to the Donor Bill of Rights.
- **Quality**: Exceed expectations with exceptional service based on timeliness, accuracy, and responsiveness.
- **Trust**: Nurture high-trust relationships by listening carefully and communicating clearly.
WAYS TO GIVE

There are many ways to impact the success of the University of Wyoming. Rest assured that your gift—no matter the size—will do just that.

Making a gift is as simple as contributing online at www.uwyo.edu/giveonline, emailing foundation@uwyo.edu, or contacting the UW Foundation toll-free (888) 831-7795 or (307) 766-6300 for advice or assistance with the many channels of giving.

CASH GIFTS AND PLEDGES

Online donations via www.uwyo.edu/giveonline or donations via personal check, credit/debit card, or money order are the easiest ways of giving to UW and are deductible when filing an itemized tax return. Gifts are made payable to the University of Wyoming Foundation and can be mailed to: UW Foundation, 1200 East Ivinson Street, Laramie, WY, 82070-4179. You can also make a pledge, and those forms can be obtained by contacting the UW Foundation.

CHARITABLE BEQUESTS

A charitable bequest is a gift to the University of Wyoming through a will or revocable living trust. Bequests are simple, revocable, and far and away the most popular method of deferred giving at UW and across the nation. Bequest options include giving a specific dollar amount, specific property, a percentage of your estate, or the remainder of your estate after making specific provisions for loved ones.

GIFTS IN HONOR OR MEMORY

Making a gift to UW can be a great way to recognize a person and his or her accomplishments. When you make a gift in honor or memory of someone special, the foundation notifies the person being honored or the person’s family and takes great care to administer the gift according to your wishes. The university’s Tree and Bench Program is a particularly meaningful way to honor a student, pay tribute to a professor, or memorialize a friend or family member.

REAL ESTATE, STOCK, AND OTHER SECURITIES

Gifts of real estate, stocks, bonds, treasuries, and mutual funds can be an excellent way to make a gift to the university because donors can deduct the full value of the asset as a charitable contribution, avoid capital gains tax, and remove the asset from their taxable estate.
WAYS TO GIVE

RETIREMENT PLANS AND LIFE INSURANCE
Generous gifts can be made to UW by naming the UW Foundation as the beneficiary of a new or existing life insurance policy, an IRA, 401(k), 403(b), or other retirement plan. There are also a number of creative ways to make current gifts to the University of Wyoming utilizing retirement plan assets and insurance policies.

GIFTS WITH RETAINED INCOME
A charitable gift annuity or charitable remainder trust allows our supporters to make a gift to UW while retaining a lifetime income. With a charitable gift annuity, a charitable gift is made in exchange for fixed annuity payments for life. The annuity payment is based upon the donor’s age at the time the annuity is funded. Payments are guaranteed and backed by all of the assets of the UW Foundation. A charitable remainder trust can be structured so that you receive fixed or variable payments depending upon your specific needs and interests. It is not uncommon to fund a charitable remainder trust with appreciated real estate, stock, or other assets. Both a remainder trust and a gift annuity allow you to make a significant future gift commitment to UW today, retain some security in the form of life-income payments, and realize a current charitable income tax deduction.

MATCHING OPPORTUNITIES
Some corporations or organizations match the charitable gifts of their employees. Many even match charitable contributions made by retirees or directors. Check with your human resources department to see if the company you work for has a matching program. Then just send in your gift with the form from your company, and they will contribute toward the area or program of your choice.

PAYROLL DEDUCTION FOR UNIVERSITY OF WYOMING EMPLOYEES
If you are a UW employee, you can make your gift through payroll deduction. It’s quick and convenient. All you need to do is fill out the UW Payroll Deduction Authorization. As faculty or staff, you already invest so much in the university, but consider making a small monthly contribution that will impact the students you serve tenfold.
UW FOUNDATION SENIOR MANAGEMENT

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You can support the University of Wyoming by giving your gift online at www.uwyo.edu/giveonline or contact the University of Wyoming Foundation at (888) 831-7795, (307) 766-6300, or by e-mail at foundation@uwyo.edu.

Visit the University of Wyoming Foundation website at www.uwyo.edu/foundation to see how your gift is transforming Wyoming’s university.
DONOR BILL OF RIGHTS

Philanthropy is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To assure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the not-for-profit organizations and causes they are asked to support, we declare that all donors have these rights:

• To be informed of the organization’s mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.
• To be informed of the identity of those serving on the organization’s governing board and to expect the board to exercise prudent judgment in its stewardship responsibilities.
• To have access to the organization’s most recent financial statements.
• To be assured their gifts will be used for the purposes for which they were given.
• To receive appropriate acknowledgment and recognition.
• To be assured that information about their donations is handled with respect and with confidentiality to the extent provided by law.
• To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.
• To be informed whether those seeking donations are volunteers or employees of the organization or hired solicitors.
• To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.
• To feel free to ask questions when making a donation and to receive prompt, truthful, and forthright answers.

“A Donor Bill of Rights,” CASE, 1994

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It’s due to donors like you that Wyoming’s university continues its greatest era.

Thank You
The results of philanthropy are always beyond calculation.

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