



MEMORANDUM

To: University of Wyoming Board of Trustees

From: University of Wyoming Foundation

Re: Liaison Report for March 2021 meeting

Date: March 8, 2021

Thank you for this opportunity to update you on the activities of the University of Wyoming Foundation through our liaison officers, Trustees Marsh and Fall. Please see below.

TETON COUNTY PROPERTY

The UW Foundation accepted a gift of real property located in Teton County, Wyoming, in late December 2020 for the support of 4-H and UW Extension activities in Teton County.

The property was listed for sale in January 2021 and the sale of the property occurred on March 3, 2021. The net sales proceeds from the sale amounted to approximately \$1.8 million, significantly higher than the appraisal of the real property that was completed in December 2020. The proceeds will be used to create a permanent endowment that will support 4-H and UW Extension employees located in Teton County. In addition, the Teton County 4-H building located in Jackson will be named in honor of the donor's mother.

YTD PHILANTHROPY

As reflected in the monthly giving report through 1/31/21, year-to-date private support to UW is \$32,554,903.

FINANCIAL SERVICES

The UW Foundation Financial Services team is working on the budget process for our internal operations as well as the budget in relation to UW. In addition, the team has prepared the 2X and 4X report and the scholarship report to send to the various campus leads. The team is also finishing up required federal reporting for the calendar year end.

INVESTMENT SERVICES

The performance estimate using available data through 2/28/21 was as follows. Endowment pool value is \$731 million, month-to-date performance estimate is +2.2%, and year-to-date estimate is +2.4%. The UW Foundation Investment Team is in the final phase of completing due diligence on managers for a mid-cap public equity allocation.



BOARD MEETINGS

The winter UW Foundation Board Meeting was held February 11-12 via Zoom. The discussion included a focus on the UW Foundation's 3-5 year plan, development updates, and presentations from the investment, financial services, real estate, legal and government affairs, and nominating committees.

A focus of the board agenda was a new digital communications and fundraising strategy, called Digital First, which focuses on optimized, donor-first engagement strategies powered by data and new technology. Among the benefits will be improved communications through automation and segmentation, and a new donor strategy to personalize the experience for key donors on a transformational scale.