



## MEMORANDUM

To: University of Wyoming Board of Trustees

From: University of Wyoming Foundation

Re: Liaison Report for September 2021 meeting

Date: August 25, 2021

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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.

### ***YTD PHILANTHROPY***

As reflected in the monthly giving report through 7/31/21, year-to-date private support to UW is \$3,058,986.

### ***FINANCIAL SERVICES***

The UW Foundation Financial Services Team is working on the full scope audit for the previous fiscal year, updating/upgrading security for software systems utilized by the foundation, and working with internal audit to enhance the system used in reporting and transferring funds from foundation to university.

### ***INVESTMENT SERVICES***

Unaudited performance estimate through 7/31/2021 using available data (private manager data is one quarter lagged) is 11.4% year-to-date and produces an estimated endowment value of \$787 million dollars. The UW Foundation Investment team has had a busy summer implementing new service providers and responding to investment opportunities. Working with our three summer interns, we also made significant progress in mapping our mineral assets and communicating with existing private managers to help build out the asset allocation pacing model. We were pleased and impressed by the contributions made by our interns and wish them the best of luck during their next semester at UW and thereafter.

### ***GIVING DAY***

UW's annual Giving Day will be held in conjunction with Homecoming this year. Giving Day is scheduled for the 24-hour period from noon to noon on October 20-21. Donor matches and challenges will once again be featured, and the UW Foundation Board will be matching gifts up to \$100,000. Additional matches and challenges will also be available to donors. The theme this year is "Give Gold".



In 2020, Giving Day raised \$843,305 in gifts and pledges from 2,357 donors, double the number of donors and double the number of dollars received during the previous year.

#### ***BOARD MEETINGS AND NEW MEMBER ORIENTATION***

The fall UW Foundation Board Meetings will be held September 23-24 in Laramie at the Marian H. Rochelle Gateway Center. This will be the first board meeting for four new board members—Lee Betsill, Robin Bolz, James Martin, and Martha Brown Wyrsh.

Over the summer, three of the new board members were able to visit Laramie for an onsite orientation, review of committee assignments, and a tour of the UW Foundation departments. Additionally, all the new board members will be attending a virtual orientation session prior to the fall board meeting with the UW Foundation Board leadership team and the foundation's senior management.

#### ***DIGITAL FIRST INITIATIVE***

Major progress has been made on the UW Foundation's Digital First Initiative—the new digital communications and fundraising strategy. Evertrue, a platform that allows for one-to-one engagement with donor prospects on a transformational scale, launched in July. This system will improve the engagement of UW supporters, leading to increased private support. Additionally, the UW Foundation is implementing a new email engagement tool and an updated online giving platform, allowing for multiple ways for people to give including via cryptocurrency. Both will improve the alumni and donor experience. The foundation stewardship team is also implementing a new online portal for scholarship donors in partnership with the university.