

STRATEGIC FUNDRAISING PRIORITIES

Keys to elevating private giving for public higher education:

- **A Bold Vision**
- **Focus Private Gifts on achieving the “Margin of Excellence”**
- **Private Gifts should not be viewed as replacement dollars for state funding or for standard revenue generating practices**

The University of Wyoming Foundation is an actively engaged strategic partner in the university’s planning process. The UW Foundation helps identify strategic fundraising opportunities that will propel UW to achieve its top tier agendas—nationally recognized for exceptional programs that prepare our students for academic and professional success.

Strategic Fundraising Priorities are the areas of greatest opportunity, not necessarily the areas of greatest need, that have the highest potential to generate private support. Criteria are the following:

- A focused, specific, and achievable vision
- Institutional commitment and advocacy
- Proven record of success and distinction in identified or related area(s)
- Recognized prospects and/or donors
- Identified deliverable(s)

Donors’ vital private contributions are not only about funding a single set of priorities. They are also about creating dynamic relationships between those who desire to impact people’s lives and the causes that inspire their generosity. Private giving will continue to play a critical role in UW’s transformation for years to come.

1-2 YEARS

SHORT TERM STRATEGIC FUNDRAISING PRIORITIES


ULTIMATELY GUIDED BY UW STRATEGIC PLAN



ENGINEERING 


Achieving Tier I status through capital facilities and identified programmatic priorities.

\$20 MILLION

ENVIRONMENT 


Elevating the stature of the Haub School through innovative interdisciplinary teaching, research, and collaborative stakeholder-driven solutions to environmental challenges.

\$10 MILLION

ENERGY 


Creating technology and knowledge that leverage Wyoming's natural resources; generating revenue opportunities for the state that include supply of clean energy and carbon products; providing continued leadership in unconventional reservoirs.

\$30 MILLION

EDUCATION 


Achieving national preeminent status in professional educator preparation through the advancement of the Trustees Education Initiative and the outreach of the UW Literacy Research Center and Clinic in Wyoming communities.

\$15 MILLION

STEM 

Leveraging the Michael B. Enzi STEM Building to support programmatic opportunities including scholarships, research, summer programs, outreach opportunities, and a K-12 STEM Center.

\$20 MILLION

HONORS 


Creating a University of Wyoming Honors College. This strategic fundraising priority will be guided by President Laurie Nichols.

TBD

ENTREPRENEURSHIP 

Creating an interdisciplinary culture of entrepreneurship that is accessible across all of the university's colleges, departments, centers, and programs.

\$10 MILLION

BUSINESS 

Supporting student success, academic excellence, and community engagement through the Rocky Mountain Center for the Advancement of Professional Selling and the creation of a School of Accountancy.

\$5 MILLION

AGRICULTURE 

Supporting opportunities will build on the significant areas of expertise at the College of Agriculture and Natural Resources including wildlife and livestock health, as well as reclamation and restoration.

\$20 MILLION

BIODIVERSITY CONSERVATION 


Building on excellence at UW's Biodiversity Institute through the promotion of research, education, and outreach concerning the study and preservation of living organisms in Wyoming and beyond.

\$5 MILLION

LAW 


A Centennial Campaign for the College of Law supporting a building expansion for clinical and experiential learning, a Hall of Traditions & Fame, and programs enhancing collaboration across campus.

\$15 MILLION

PLANNED GIVING 

Planned giving has a defining impact creating a legacy of traditions and remembrances for UW students, faculty, and programs that will last for generations. The UW family—alumni and friends of all levels of wealth—can engage in strategic planned giving with an emphasis on strengthening UW's endowment.

\$100 MILLION

HEALTH CARE 

Establishing a Center for Integrated Health Care that will pull together faculty across the College of Health Sciences to better integrate disciplines and to maximize a vision for healthy bodies, healthy minds, and healthy communities across Wyoming.

\$5 MILLION

STATE MATCHING FUNDS

2016 LEGISLATIVE SESSION

TOTAL APPROPRIATION \$11,500,000

Large Pool (Entrepreneurship, CEAS, SER, Haub - water management)	\$10,350,000
Commitments received to date (Hess - \$5 MM, Fisher - \$2.5MM)	<u>(\$7,500,000)</u>
Remaining balance	\$2,850,000
Small Pool (to be defined)	\$1,150,000

PRIOR LEGISLATIVE SESSION

TOTAL \$7,500,000

Petroleum Engineering Chairs	\$5,000,000
Literacy Center	\$2,500,000

REINVESTMENT POLICY

UNIVERSITY OF WYOMING UNIVERSITY OF WYOMING FOUNDATION

Endowment Earnings Reinvestment Policy

I. DEFINITION

Reinvestment is the process of identifying expendable endowment payout funds that are not able to be spent on endowment purposes in a reasonable amount of time after distribution and adding them back to the endowment corpus. Reinvestment will increase the invested assets of the endowment which in turn will enhance the future distributions as a curb against inflation and the loss of purchasing power over the years.

II. ELIGIBLE FUNDS

Funds eligible for reinvestment are any expendable funds that have been distributed to spend on endowment purposes. Before reinvestment is considered, all efforts should be made to expend the dollars for the purposes expressed in the endowment agreement. When an endowment account's expendable funds balances reaches a level of more than two times the average annual distribution to expendable funds, consideration of this option should be made.

If funds are being accumulated for a specific purpose, a business plan should be developed and approved by the department head, dean, and appropriate Vice President. Once approved, the plan should be filed with the Shared Business Services Office for future monitoring. Any accumulated funds not being utilized according to the filed plan may be considered for reinvestment.

III. REINVESTMENT PROCESS

- a. Departments and colleges should review expendable balances at least annually to be sure that donor funds are being used as directed by donor agreements. This annual review should take place at the end of the fiscal year.
- b. Prior to October 1, college or department can request reinvestment of expendable funds by submitting a "Transfer of Funds from Expendable Income to Permanent Endowment" form to the University of Wyoming Foundation.
- c. The form must be signed by the department head or dean of the unit that benefits from the funds per the endowment agreement, as well as the responsible Vice President and the Vice President of Administration.
- d. The University of Wyoming Foundation will provide a written confirmation to the department or college when the transfer of funds has occurred.

IV. REINVESTMENT CONDITIONS

- a. Reinvestment of funds is a decision that is made by the department and college/unit that is the beneficiary of the expendable funds.
- b. Reinvestment of funds is a permanent decision.
- c. Reinvested funds are no longer available for endowment purpose expenditure now or in the future.

ADDENDUM A

Review of Endowment Earnings with more than Two Times the Annual Distribution

- I. During the first week of April, the University of Wyoming Foundation will produce a Reinvestment Report to be distributed via email to all responsible parties including department heads, deans, directors and vice presidents. This report will list all accounts with expendable endowment payout funds in excess of two years of average annual distributions as of end of February of that year.
- II. After careful review and consideration of their accounts listed on the report, departments and colleges/units, based on approval of the UW Office of Academic Affairs, or relevant Vice President if outside of Academic Affairs, may choose between two options:
 - i. Permanently reinvest some or all of the funds back into the corpus of the endowment for future growth, by submitting a signed “Transfer of Funds from Expendable Income to Permanent Endowment” form to the University of Wyoming Foundation; or
 - ii. Develop a business plan outlining the specific purpose for which funds are being accumulated for future use. Plans must be approved by the responsible Vice President and the Vice President for Administration. Once the plan is approved, it will be filed with the Shared Business Services Office for future monitoring.
- III. Decisions regarding all accounts listed on the annual Reinvestment Report are due from departments/ colleges/units by the first week of May.

UNIVERSITY OF WYOMING

STATE MATCHING FUNDS PLAN – BUDGET SESSION 2016

The State of Wyoming having recently appropriated the sum of One Million One Hundred Fifty Thousand Dollars (\$1,150,000) for the University of Wyoming to match certain gifts for university initiatives with a total cost of less than \$200,000, the University of Wyoming Board of Trustees hereby establishes the following policy to govern the allocation of said matching funds.

From this pool of matching funds, the sum of \$150,000 shall be set aside to match gifts for any university initiative or program, except as specifically excluded herein, in the minimum amount of \$5,000 and the maximum amount of \$25,000. Qualifying matching gifts can be made in support of students (undergraduate or graduate), faculty or programmatic functions. The matching funds can be used to match expendable or endowed gifts.

\$1,000,000 from this pool of matching funds shall be set aside to match gifts for any university initiative or program, except as specifically excluded herein, in the minimum amount \$25,000 for expendable gifts and \$50,000 for endowed gifts, with a maximum gift amount of \$100,000 per donor. Qualifying matching gifts can be made in support of students (undergraduate or graduate), faculty or programmatic functions. The matching funds can be used to match expendable or endowed gifts.

Preference will be given to any initiative or program within the College of Arts and Sciences, the Debate Team, Honors Program, “Synergy”, the UW Art Museum, the American Heritage Center, UW Libraries, International Programs, the Center for Global Studies, UW Humanities Research Institute, and the Ellbogen Center for Teaching and Learning. No department, initiative or program will be permitted to claim more than \$200,000 in matching funds. Gifts made to the College of Engineering, College of Education, School of Energy, Intercollegiate Athletics and the Haub School of Environment & Natural Resources are not eligible for this pool of matching funds.