



MEMORANDUM

To: University of Wyoming Board of Trustees

From: University of Wyoming Foundation

Re: Liaison Report for May 2023 meeting

Date: May 1, 2023

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

YTD PHILANTHROPY

As reflected in the monthly giving report through March 31, 2023, year-to-date private support to UW is \$49,245,614.

Recent noteworthy gifts include:

College of Business Deanship

The towering legacy of a Wyoming family has been further honored with the creation of a deanship in the University of Wyoming College of Business—the H. A. “Dave” True, Jr. Family College of Business Deanship.

The purpose of the True Deanship is to enrich the business climate within the state by supporting the dean of the UW College of Business and the college’s education, research, and outreach. Funds can be used to recruit and help retain top talent and to foster excellence and address critical needs and priorities of the College of Business.

The True Deanship is now the university’s third named deanship, after the Ellbogen Deanship in Education and the Carrell Family Dean in the College of Engineering and Physical Sciences.

Liliane and Christian Haub Fund Professorship

A gift to the University of Wyoming from philanthropists Liliane and Christian Haub will establish the Liliane and Christian Haub Professorship in the Haub School of Environment and Natural Resources, which will support the school’s work in environment and natural resources.

“We are thrilled to support this professorship to attract and retain talented educators and researchers in order to build the best possible faculty who will have a tremendous influence on generations of students to come,” Liliane Haub says.



The purpose of the Liliane and Christian Haub Professorship is to help early-career faculty maximize their impact on the Haub School through their research, teaching and outreach efforts. Additionally, it is designed to help them make progress toward tenure and promotion through the ranks of professor.

UW FOUNDATION STEWARDSHIP AWARD

Two University of Wyoming faculty members have earned the prestigious UW Foundation Stewardship Award. They are Cindy Price Schultz, Communication and Journalism department head, and John Kaszuba, the John and Jane Wold Centennial Chair in Energy.

The UW Foundation Stewardship Award recognizes the leadership of UW faculty members who excel in the relationship-building and stewardship of alumni and donors through effective use of private gifts, engaging former students in the activities of the university, and a commitment to strong external relationships for the betterment of UW.

FINANCIAL SERVICES

The Financial Services team is currently in the process of completing its external reporting, which includes the 990 tax exempt organization return and state business registrations. In addition to this, they are also in the midst of receiving business plans and reinvestment plans from the university for the 2X 4X Report process. As part of their ongoing efforts to ensure efficient financial management, the team is also working on budgeting with the university's system as well as with internal budgeting for the foundation. Another important aspect of their work is on-boarding new members of the foundation team, ensuring that they have the necessary tools and resources to carry out their responsibilities effectively.

INVESTMENT SERVICES

The estimated endowment pool year-to-date and fiscal year-to-date performance through March 31 is 2.9%, and 3.65% respectively, while the endowment pool value as of March 31, 2023, is estimated to be \$782.2 million.

In March, the Investment Committee gave approval to replace our passive public bond fund with an active public bond manager. The Investment Committee also approved an investment in an opportunistic real estate development which had previously been presented at the February Board meeting in Arizona. The committee also approved a commitment to a private debt fund.

After two years of outperforming the benchmark by 19% annualized, the committee voted at the February meeting to redeem the SPAC strategy and roll the proceeds into other fixed income opportunities.



CAMPUS OUTREACH

The UW Foundation held a recognition and appreciation event for college/unit business managers and accountants from across campus. The event was attended by 27 campus colleagues.

This was the second consecutive year for the meeting, and it was held at the Gateway Center. The event was a testament to the foundation's recent efforts to build strong relationships across the campus community, which were beneficial for all parties involved. Several speakers, including Brett Kahler, Brett Befus, Jess Stugart, and Kendall Gonzalez, provided valuable insights into fundraising, planned giving, data management, and upcoming accounting reporting changes. The event was organized by the Stewardship and Donor Relations Team at the foundation.

NEW ADVANCEMENT SERVICES VICE PRESIDENT

Following a national search, Elizabeth Jenkins was named the foundation's vice president for advancement services, a newly created role within the organization.

Elizabeth has been a part of the UW Foundation since January 2017, serving in various capacities, most recently as associate director of stewardship. As vice president for advancement services, she will oversee several departments within the UW Foundation including Information Services, Stewardship and Gift Administration, and Prospect Development, Research, and Management.