



MEMORANDUM

To: University of Wyoming Board of Trustees

From: University of Wyoming Foundation

Re: Liaison Report for March 2025 meeting

Date: March 11, 2025

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 January 31, year-to-date private support to UW is \$41,061,237.

ADVANCEMENT SERVICES

The Information Services team is currently collaborating with a data privacy consultant to conduct a gap analysis (also known as a needs analysis). As part of this effort, they will be leading a workshop at the end of March. Additionally, the team is completing an upgrade of the SSRS Server (a server-based reporting platform).

In Donor Relations, the second annual UW Donor Appreciation Day took place on February 14. More than 22,000 donors received a heartfelt email of gratitude. This year, both the campus community and students played a more active role in the celebration, enhancing the overall impact.

The Prospect Development Team is completing documentation in preparation for external interviews conducted by BWF consultants.

CAMPAIGN PLANNING

In March and April, campaign consultant BWF will conduct virtual interviews with selected alumni and donors to gather insights for a potential comprehensive campaign. Additionally, a donor survey will be emailed to a broader group of UW constituents to assess their engagement, pride, passion, and awareness of the university.

Meanwhile, the UW Foundation, along with the president, provost, and key alumni leaders, will convene in early April to establish a task force. This group will evaluate campaign readiness, review a campaign prospectus, and discuss potential priorities.



The project remains on track, with a full readiness report scheduled for presentation to the UW Foundation Board in June and the Board of Trustees in July.

A campaign serves as a powerful tool to increase private support and engagement, fostering deeper connections with alumni, donors, and the state. It also sharpens the university's messaging, amplifying awareness of UW's unique value propositions and increasing its "mindshare" among key stakeholders. Moreover, It represents a critical opportunity to elevate fundraising efforts to new levels, unlocking potential for growth and innovation across the institution.

The university's last comprehensive campaign was 20 years ago.

DEVELOPMENT

Fundraising efforts for the fiscal year to date have been exceptionally strong, exceeding the five-year average by 17%. Cash received from realized planned gifts and pledge payments has reached a record level, in excess of \$20 million.

Meanwhile, the development team is actively recruiting for key positions, including an Annual Giving director and up to four directors of development, to further strengthen fundraising initiatives.

FINANCIAL SERVICES

As the Financial Services team wrapped up work on external reporting, significant progress was made on key filings, annual reporting, and various state reports. With these tasks nearing completion, attention has shifted to the 2X Report process. The initial report was sent to the university for review, marking an important step in moving the process forward.

Simultaneously, budgeting efforts are underway, both within the university's financial system and for the foundation's internal operations. These discussions are closely tied to ongoing strategic planning, including an evaluation of the foundation's staffing structure and workloads in anticipation of a potential comprehensive campaign. As part of this effort, new team members have been onboarded, ensuring a smooth transition and alignment with organizational goals.

Additionally, a review of internal policies was initiated, focusing on permanent endowed funds, investments, and undesignated gifts.

INVESTMENT SERVICES

Markets softened toward the end of February, with the S&P 500 dipping into negative territory year to date. This was largely driven by a decline in risk assets including bitcoin and six of the seven 'Magnificent 7' stocks.

The ongoing AI investment cycle is continuing to drive high energy demand, with natural gas solidifying its role as a key power source. The endowment is well positioned in that capital spending cycle through our exposure to natural gas.



Rising trade tensions and newly proposed tariffs have added volatility to global markets. Higher import costs and supply chain disruptions could dampen growth.

The endowment estimated ending value through February was \$870 million, estimated performance year to date was 1%, and fiscal year to date was 4.9%.