



MEMORANDUM

To: University of Wyoming Board of Trustees

From: University of Wyoming Foundation

Re: Liaison Report for March 2025 meeting

Date: April 25, 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 March 31, year-to-date private support to UW is \$46,465,355.

ADVANCEMENT SERVICES

The Information Services team hosted a data privacy workshop on March 31, continuing their work to address issues identified in the recent GAP analysis. Meanwhile, Donor Relations has begun work on the FY25 Endowment Report, setting the stage for the next fiscal year.

The Prospect Development Team is collaborating with BWF's data science director, Emma Hinke, to find ways to improve prospecting scores. Their efforts are focused particularly on refining scoring systems to better support the new Development Team's cohort structure.

On the Gift Administration side, a university-wide business managers meeting took place on April 23. The event featured presentations from Gift Administration, Financial Services, Donor Relations, and the Office of Scholarships and Financial Aid. Now in its fourth year, the meeting marked a milestone as the best-attended event yet.

CAMPAIGN PLANNING

In April, campaign consultant BWF conducted virtual interviews with selected alumni and donors to gather insights for a potential comprehensive campaign. More than 35 individuals and couples have been interviewed so far with a goal of interviewing at least 40 in total. Additionally, a donor survey was 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, convened in early April for the first meeting of the campaign task force. This group provided valuable and candid feedback on the university's campaign readiness, including a careful review of the campaign prospectus used to outline the priorities for a possible campaign. The task force will



meet again in May to review the changes to the prospectus and to talk about additional ways they can engage in campaign planning.

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

The UW Foundation remains on track to achieve one of its strongest fundraising years to date, continuing to make significant progress in securing support for student success and faculty excellence. A notable recent gift includes a significant realized estate gift from the late Harry Lawroski, which will benefit STEM programs.

The Development Team has embraced a new cohort model designed to broaden fundraising support and coverage across all colleges and units. This strategic approach aims to elevate UWF's service to the university community while delivering the best donor experience of any public university in the country. Development officers recently participated in training with the School of Energy Resources, enhancing their fluency in key priorities and opportunities both within SER and through its partnerships with the colleges.

Following an intensive recruiting effort, development is conducting final-round interviews for several director of development positions, having attracted one of the strongest candidate pools in recent memory. The search for a director of annual giving is also underway. Additionally, the team has successfully filled a new position focused on strengthening the donor pipeline strategy and supporting key fundraising goals.

FINANCIAL SERVICES

The university's budget process is currently underway, alongside work on the internal foundation budget. Efforts are also in progress by the Financial Services team to renew the foundation's internal insurance agreements. At the same time, coordination is taking place to gather campus input and business plans related to the reinvestment of funds.

Additionally, the foundation is actively interviewing and onboarding new employees to fill both open and newly created positions.



INVESTMENT SERVICES

The estimated endowment one-year and fiscal year-to-date lagged performance through March 31 is 4.83% and 4.09% respectively. While the endowment pool value as of March 31 is estimated to be \$860.6 million.

The drawdown of endowment value from the peak in November to the current value as of April 23, 2025 is estimated to be 3.20%, so we are pleased with how the portfolio has performed. In summary, during the first calendar quarter of 2025, the Investment Committee approved the following:

- A \$1 million commitment to a specialty finance co-investment.
- A \$2.5 million commitment into a real estate investment.
- Increased investment commitment by \$250,000 with an existing real estate manager.
- A \$16 million investment to a U.S. small-cap equity manager.
- A \$10 million commitment to an infrastructure strategy.
- A partial redemption of \$4 million of a U.S. investment-grade fixed income manager.

GIVING DAY

The University of Wyoming Foundation will host UW'S 11th annual Giving Day from noon to noon, October 23-24, rallying the Cowboy community under the theme "Seize the Day". This 24-hour event fuels hundreds of university priorities in academics, athletics, and student life. Last year, a record-breaking 11,202 donors gave more than \$4.1 million, marking the most successful Giving Day in UW history.