



MEMORANDUM

To: University of Wyoming Board of Trustees

From: University of Wyoming Foundation

Re: Liaison Report for September 2025 meeting

Date: September 9, 2025

Thank you for this opportunity to update you on the University of Wyoming Foundation through our liaison officers, Trustees Bonner and Fall. Please see below for a sampling of some of the activities undertaken since our last report.

YTD PHILANTHROPY

As reflected in the monthly giving report through July 31, official year-to-date private support to UW is \$4,025,007.

ADVANCEMENT SERVICES

The Prospect Management team continues to work to align all fundraiser portfolios and pipelines with the new development model, and in consultation with the new Director of Pipeline Strategy. Most notably this includes changes to fundraiser dashboards for performance metrics, fundraising goals and KPIs, and research on new major, planned, and principal gift discovery prospects, segmented by giving level and campus unit.

Donor Relations is continuing work on this year's Endowment Report and is also managing the hiring process for two positions.

The Information Services team is currently in final testing for two new software roll-outs: DocFinity and Unified Interface for CRM Advance. Both should be live by September 15, with trainings scheduled for the whole foundation team.

The Gift Administration team is working with OSFA on a comprehensive audit of criteria in preparation for OSFA's RFP for new scholarship awarding software.

CAMPAIGN PLANNING

The UW Foundation has initiated whiteboard sessions with academic partners to clarify the "why" of a future comprehensive campaign and to identify specific fundraising priorities within each college and unit. Six sessions have been completed, with more scheduled throughout the fall, with the goal of finishing by year's end.



This work directly reflects the guidance received in BWF's Campaign Readiness Report and their June presentation to the UW Foundation Board. BWF recommended a seven-year comprehensive campaign preceded by a year of focused planning. Both the UW Foundation Board and the UW Board of Trustees reinforced the need for a compelling articulation of the campaign's purpose, as well as greater specificity in defining priorities.

The whiteboard sessions are designed to meet those expectations. They bring academic partners into the conversation, help shape a more clearly defined vision, and ensure alignment around priorities that will resonate with donors.

Next Steps

The foundation is entering an Infrastructure and Awareness Phase to:

- Secure staffing and resources for campaign preparation.
- Refine the campaign vision and priorities informed by the white board sessions.
- Strengthen alignment across alumni and philanthropic audiences.

This is the first comprehensive campaign planning effort in 20 years, and we are proceeding deliberately to ensure the foundation, the university, and our partners are fully prepared for success.

DEVELOPMENT

The UW Foundation now operates John E. Rice & Sons, Inc., a real estate holding company generously gifted from the estate of Neltje. Among its holdings are parcels of undeveloped land in north Sheridan. Since the foundation began overseeing the company, one property has already been sold, another is under contract, and offers have been received on two additional sites. The proceeds from these sales are designated to support the Neltje Center and the Jentel Artist Residency, furthering Neltje's legacy of fostering creativity and the arts.

In addition, the UW Foundation recently received a significant estate gift from the late Cynthia Wilde. Her generosity will establish scholarships for students pursuing studies in agriculture and veterinary science.

FINANCIAL SERVICES

Financial Services is currently collaborating with external auditors on the full-scope audit, ensuring all requirements are met for accuracy and compliance. The team is also working closely with the UW group to coordinate and reconcile year-end numbers in preparation for the audits and financial statements. At the same time, efforts are underway to finalize the August 2X4X report and associated reinvestments.

In addition, Financial Services is partnering with the stewardship team to prepare endowment facilities reporting, while also updating the Marian H. Rochelle Gateway Center report to reflect reserves activity and balances. Alongside these priorities, the team is supporting organizational growth by onboarding new employees with the foundation.

INVESTMENT SERVICES

The endowment has surpassed \$900 million. In July, the Investment Team welcomed Hazen Dickerson, expanding capacity and expertise. Meanwhile, markets are adjusting to a growing likelihood of interest rate cuts beginning in September.

GIVING DAY

The UW 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.

