



## **MEMORANDUM**

To: University of Wyoming Board of Trustees

From: University of Wyoming Foundation

Re: Liaison Report for January 2026 meeting

Date: January 6, 2026

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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 November 30, year-to-date private support to UW is \$37,521,234.

### ***ADVANCEMENT SERVICES***

Prospect Management team has implemented updated Development team performance metrics, establishing distinct KPIs across five fundraising levels (Assistant Director of Development through Associate Vice President). These enhancements follow extensive research, data analysis, and senior leadership approval, and align with national best practices.

Gift Administration continues to review and restate funds with protected-class criteria, working with UW's Office of General Counsel to ensure full compliance. The foundation's campus engagement coordinator remains an advocate for hiring and supporting opportunity administrators for scholarships.

The Donor Relations team distributed FY25 Endowment Reports in November–December 2025 (1,891 reports via mail and digital delivery). Academic Year 25-26 scholarship letters will be distributed soon to 442 donors, representing 1,110 individual scholarships.

The Information Services team completed comprehensive penetration testing (September–October 2025), assessing internal and wireless networks, vulnerabilities, and social-engineering risks. The assessment provides strategic insight into current risks and priority security investments.

The UW Foundation has successfully completed implementation of the DocFinity Document Management System, improving operational efficiency, accuracy, and data security through automated workflows, secure storage, controlled access, and audit trails.



### **CAMPAIGN PLANNING**

Campaign planning is part of UW's Strategic Plan. It is a key execution strategy of Goal 5: Cultivate Financial Stability/Diversification, so the UW Foundation continues its work on this important goal.

The UW Foundation has completed 16 individual 2-hour 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. The following sessions have been completed, with a handful more scheduled in January.

- American Heritage Center
- Art Museum
- Athletics
- College of Agriculture, Life Sciences, and Natural Resources
- College of Arts and Sciences
- College of Business
- College of Education
- College of Engineering and Physical Sciences
- College of Health Sciences
- College of Law
- Haub School of Environment and Natural Resources
- Honors College
- Research and Economic Development Department
- School of Energy Resources
- Student Affairs
- UW Neltje Center for Creativity and the Arts

This work reflects guidance from BWF's Campaign Readiness Report. BWF recommended a seven-year comprehensive campaign following a year or more of planning. Both the UW Foundation Board and Board of Trustees emphasized clearly defining the campaign's purpose and 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 include:

- Compile and organization themes and fundraising priorities
- Focus on the vision for a campaign
- Presentation to UW Academic Leadership – President and Provost
- Presentation to UW Foundation Board during February meeting
- Joint presentation/discussion with all the academic partners
- Presentation to Campaign Planning Task Force
- Presentation to UW Board of Trustees



Additionally, the UW Foundation is continuing its partnership with BWF to focus on assessments of the following:

- Advancement Infrastructure and Systems
- Donor Relations and Campaign Readiness

### **DEVELOPMENT**

Calendar year-end giving and commitments in support of UW are in full stride. During the first 15 days of December alone, the UW Foundation received 52 individual gifts and commitments of \$10,000 or more, totaling more than \$6.1 million—demonstrating strong donor confidence and momentum as the year concludes.

As of December 15, 2025, fiscal year 2026 fundraising totals approximately \$42.6 million. At this pace, FY26 is positioned to become the most successful fundraising year in UW's history, reflecting both sustained donor engagement and the effectiveness of our advancement strategy.

Recognizing that people are our most important resource, the UW Foundation is actively investing in the Development team by hiring additional Directors of Development to strengthen fundraising capacity and ensure exceptional service to UW.

The Development Team's culture is grounded in trust, service, joy, and authenticity. These values guide daily work and reinforce a collaborative, mission-driven approach that supports both philanthropic success and long-term institutional impact.

### **FINANCIAL SERVICES**

The Financial Services team has been making steady progress on several critical initiatives. The team continued progress on required external reporting, including IRS filings such as 1099s, Form 990, and Form 5500, ensuring ongoing compliance and accuracy. Internally, the team conducted a mid-year reforecast to adjust budgets based on current performance and updated assumptions.

In parallel, the team worked closely with UW Foundation auditors to respond to state requests and provide updated financial reporting as required. They are also in the process of closing out calendar-year activity, including the final accounting and reconciliation of gifts received by the UW Foundation.

Looking ahead, they have begun the annual budgeting process in coordination with the university to align priorities and financial planning. At the same time, the team is onboarding new members of the UW Foundation team to support our operational needs and long-term goals.

### **INVESTMENT SERVICES**

The Investment team reports that the estimated market value of the endowment pool as of November 30, 2025, is \$919 million. Liquidity from private equity net fund flows (Distributions - Capital Calls) reached \$23 million YTD through November.



In addition, the Investment Committee subcommittee approved an investment in Stone Ridge Energy Acquisition Fund III.