



MEMORANDUM

To: University of Wyoming Board of Trustees

From: University of Wyoming Foundation

Re: Liaison Report for July 2026 meeting

Date: June 23, 2026

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 May 31, 2026, year-to-date private support to UW is \$97,978,018.

ADVANCEMENT SERVICES

Advancement Services continues to support Foundation operations through strategic stewardship, data management, gift administration, and prospect development initiatives.

Donor Relations is in a particularly busy period as the team works on scholarship letters and annual endowment reports. These efforts provide meaningful stewardship opportunities by connecting donors with the impact of their philanthropy and ensuring transparent reporting on endowed funds.

Gift Administration is rolling out a new state match proposal tracking process in partnership with Development and compiling a waitlist for FY26 state match pools.

Information Services is developing a comprehensive Data Flow Mapping Workbook to document how constituent, donor, and institutional data is collected, used, stored, shared, and retained across the organization. This effort will support data governance, compliance readiness, and risk management. The team is also developing cybersecurity tabletop exercises to test incident response procedures, clarify roles and responsibilities, and strengthen organizational preparedness.

Prospect Management, Research, and Analytics is building the infrastructure for the Brown and Gold Ambassadors program, including prospect segments, dashboards, and training modules. The Brown and Gold Ambassadors is a new student ambassadors program within the UW Foundation.

CAMPAIGN PLANNING

The foundation continues its partnership with BWF to evaluate advancement infrastructure, systems, and donor relations as the organization—together with the university—prepares for a comprehensive campaign.

Specifically, BWF is partnering with the UW Foundation on the following:

- *Donor Relations and Campaign Readiness:*
 - BWF is providing focused counsel and support to strengthen UWF's Donor Relations program and prepare the team for future campaign success.
- *Prospect Management and Research Infrastructure and Systems:*
 - BWF is providing strategic counsel and guidance to optimize UWF's advancement infrastructure, prospecting, and prospect management practices.
- *Principal and Transformational Gift Strategy:*
 - This engagement is focused on helping UWF articulate and design a coherent principal gift strategy that deepens investment, expands engagement, and establishes a strategic foundation for future structure, staff, and decisions.
- *Pre-Campaign Planning and Management Framework:*
 - BWF is helping UWF map the campaign strategy and structural design including an appropriate campaign structure, including phases, sequencing, counting, and timing.

DEVELOPMENT

Fiscal year 2026 is on track to be a record-breaking year, with fundraising year-to-date totals exceeding \$100 million as of June 18, 2026. This total is approximately 150% higher than the previous fiscal year's total and approximately 170% higher than the average over the past five fiscal years. Fundraising success this year includes 16 unique gifts and commitments in excess of \$1 million so far.

Gift planning and asset-based giving have also been key contributors to fiscal year 2026 fundraising success, with 82 closed planned gifts totaling more than \$61 million year to date. These results reflect relationships built over time and the cumulative impact of discovery, cultivation, solicitation, and stewardship efforts conducted over multiple years.

The UW Foundation Development Team recently hosted a team retreat focused on campaign readiness, individual and team wellness, and staff recognition. Award recipients included Sarah Chevalier (Fundraiser of the Year), Cayden Ferrin (Spirit of Partnership Award), Emilee O'Brien (Service Award), Keener Fry (Trust Award), and Faryn Babbitt (Grit Award).

FINANCIAL SERVICES

Financial Services is focused on several key year-end priorities, including finalizing the foundation's internal operating budget, renewing internal insurance agreements, and completing fiscal year-end closeout processes. The team is also working with external auditors in preparation for the upcoming full-scope audit. In coordination with campus leadership and business plans, Financial Services continues to manage the reinvestment of funds over 2X.



Additionally, the team is conducting interviews and onboarding new employees to fill both open and newly created positions across the foundation.

GIVING DAY

Save the date for the 12th annual UW Giving Day this year set for noon to noon, October 21-22, 2026. This 24-hour event supports hundreds of university priorities in academics, athletics, and student life.

INVESTMENT SERVICES

The UW endowment reached the \$1 billion milestone in value on the May 31 valuation. During the recent UW Foundation Board meeting, the Investment Committee approved six investment actions, including one rebalance, one position increase, and four new investments.

The UW Foundation Investment team welcomed three summer student interns: Anu Glennie from Cheyenne, Carter Redden from Buffalo, and Tim Siau from Vancouver, CA.

The current (not lagged) estimated fiscal year return through May 31 is 14.0%.

UW FOUNDATION BOARD MEETING

The UW Foundation Board of Directors held its annual summer meeting June 18–19 at the Marian H. Rochelle Gateway Center in Laramie.

During a special recognition dinner on Thursday evening, the board honored outgoing board member Ann Pickard, outgoing Board Chair Doug Stark, and UW President Ed Seidel for their leadership and service. Pickard is concluding her tenure after serving two full terms and an additional one-year appointment, while Stark is completing his two-year term as board chair.

On Friday, board members received updates from President Seidel; Mike Smith, vice president for governmental affairs; Shelley Dodd, interim vice provost for enrollment management; UW Football Head Coach Jay Sawvel; and Tyler Hughes, UW quarterback. During lunch, students from UW's debate and investment programs shared their experiences, highlighting the impact of experiential learning opportunities and student success initiatives.

The board also elected new officers, voting Scott Macdonald as chair, Martha Brown Wyrsh as vice chair, and Terry Gottberg as secretary. In addition, Doug Stark was elected to a 10-year emeritus term.