



**MEMORANDUM**

To: University of Wyoming Board of Trustees

From: University of Wyoming Foundation

Re: Liaison Report for January 2024 meeting

Date: January 10, 2024

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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 11/30/23, year-to-date private support to UW is \$23,150,902.

***ADVANCEMENT SERVICES***

The Donor Relations team is transitioning to digital delivery for many of the foundation’s annual donor communications including endowment reports, scholarship letters, and birthday cards. Additionally, our campus engagement coordinator is continuing to cultivate meaningful relationships with campus partners by assisting them with their foundation questions and actively demonstrating our sincere appreciation for their efforts.

The Data Integrity team is finishing the review of more than 8,500 Giving Day contributions for demographic updates, and ensuring tracking for events and engagement across campus. Our gift agreement coordinator has created more than 175 new fund, pledge, and gift agreements this fiscal year, many with state match contributions.

Additionally, the Prospect Management, Research, and Analytics team is focused on large scale campaign-based research and infrastructure changes. This includes the mass scanning of 150,000 records and the prioritization of wealth and giving capacity data. Additional improvements to existing reporting have streamlined data retrieval including fundraiser metrics, gift counts, and other important prospect management data.

The Information Services team just finished a major upgrade of the foundation’s document storage application and server that required coordination with UWIT, the application vendor, foundation users, and multiple team members on the IS team. The IS Team also completed a new checklist to be used for new software and hardware purchases. The primary goal of this new checklist is to enhance financial and data stewardship, ensure compatibility with our existing infrastructure, promote regulatory compliance, and fortify the security of our software and hardware systems.



### ***DEVELOPMENT***

The UW Foundation Development team continues working on effectively engaging alumni and donors by connecting their passion with university priorities.

A fundraising highlight includes a significant deferred gift commitment from UW Foundation Board Member Ann Pickard and her partner Dan Smith, to support a scholarship for first-generation students and literacy programs at UW.

Additionally, the UW Foundation will be hosting a development/fundraising training for UW academic leaders and development professionals later this spring. The session will be hosted in Laramie and focus on “articulating clear unit priorities to enable fundraising success.” The session will be led by Academic Impressions and Jim Langley, an industry leader in development training.

Moreover, the UW Foundation is seeking applications and nominations for the position of Senior Vice President for Development. This position was previously held by John Stark prior to his promotion to President/CEO of UW Foundation. Applications are due February 8, 2024.

### ***FINANCIAL SERVICES***

Currently, the focus for the Financial Services team is working on external reporting (1099s, 990, 5500, etc), adjusting internal budgeting in our mid-year reforecast, and working with auditors on updating state requests as well as 990 questions with new audit firm. Additionally, the team is winding down the end of calendar year gifts received at the foundation.

The team will also begin the budgeting process with university and continue onboarding new members of foundation staff.

### ***UW FOUNDATION BOARD MEETINGS***

The winter UW Foundation Board meetings will be held February 8-9 in San Diego. The meetings will also feature “An Evening with UW” alumni and donor event on Thursday night featuring UW President Ed Seidel, new football Coach Jay Sawvel, UW Athletic Director Tom Burman, and a presentation on student success. These events are an ideal opportunity for alumni and donors from the area to engage with each other and hear from the university’s leadership. The following is a Save the Date invite that went out to our alumni and donors in January.



Alumni and friends of the University of Wyoming, please save the date for an evening of connection, student success stories, and more.

6:00 PM – 8:00 PM

Catamaran Resort and Hotel  
3999 Mission Blvd.  
San Diego, CA