

Northwest College Foundation Board of Directors

AGENDA

Wednesday, August 5, 2026, 4:00 p.m.

NWC Student Center, Room 236

<https://nwc.zoom.us/j/97743712007?pwd=tQtJQn8PxEaVwqfWbfEIiTnlLchm7b.1>

Meeting ID: 977 4371 2007; Passcode: 543160

	Assigned Time	Page Number
Call to Order – Steve Rockhold, President		
Election of Officers and Board Members - Passing of the Gavel - Resolution to grant signature authority to officers	10 min.	2
Consent Agenda Items: - Minutes from April 29, 2026 - FY26 Fundraising Results - FY26 Strategic Goal Progress Report - Minutes from Development, Donor Accountability & Stewardship, Executive, Finance, and Governance Committees - Executive Director, Development Manager, and Alumni and Development Coordinator Reports - Northwest College President's Report - Upcoming events at NWC	5 min.	3-5 6-8 9-10 11-17 18-21 22-26 27
Financial Overview – Dillon Jeffs - FY26 Treasurer's Report - Proposed FY27 Budget - Annual/Quarterly impact paid to NWC	20 min.	28-33 34-35 36
Committee Work/Board Action: Real Estate Management – Sarah Johnson Land Sale/Transition to NWC	5 min.	37-38
Development Report: - FY27 Fundraising Goals and Work Plan – Shelby Wetzel - FY27 Strategic Goal Review – Shelby Wetzel - Alumni Association Overview – Jill Hartmann	25 min	39-47 48-49
Other Business		

NEXT MEETING DATE: Wednesday, October 28, 2026, 4 p.m.

Northwest College Foundation
Corporate Resolution

BE IT RESOLVED by the Board of Directors of Northwest College Foundation that the following designated officers be authorized as signatories on all Northwest College checking and investment accounts and they be further authorized to conduct financial transactions on behalf of Northwest College Foundation.

Tim Hopkins, President

Trace Paul, Vice President

Megan Nickles, Second Vice President

Sarah Johnson, Secretary

Jacque Michel, Assistant Secretary

Stan Lundberg, Treasurer

Tyler Yates, Assistant Treasurer

Dated this 5th day of August, 2026

By _____
Sarah Johnson, Secretary

Certification

I, Sarah Johnson, am the duly elected and authorized Secretary of Northwest College Foundation and do hereby certify that the above Resolution passed at a lawful meeting at which a quorum of the Board of Directors was present and is a valid Resolution in full force and affect.

SEAL

Sarah Johnson, Secretary

**MINUTES OF THE ONE HUNDRED NINETY-SEVENTH MEETING
OF THE BOARD OF DIRECTORS
OF THE NORTHWEST COLLEGE FOUNDATION
April 29, 2026**

Nelson House and Zoom

Directors Present: Stefanie Bell, Dave Bonner, Wendy Capps, Clay Cummins, Carolyn Danko, David Hill, Tim Hopkins, R.J. Kost, Bryan Lee, Tate McCoy, Jacqueline Michel, David Northrup, Charlotte Patrick, Steve Rockhold, Nicole Rodriguez-Brown, Tyler Yates, and NWC President Lisa Watson.

Directors Unable to Attend: Sarah Johnson, Stan Lundberg, Mike McDaniel, Megan Nickles, Trace Paul, Bret Reed, Dusty Schutzman, Casey Sorenson, Chris Taggart; and Tara Kuipers, NWC Board of Trustees Liaison.

Also Present: Shelby Wetzel, NWC Foundation Executive Director; Cory Ostermiller, Development Manager; Jill Hartmann, Alumni and Development Coordinator; Dillon Jeffs, Foundation Accountant; and Diedre Asay, Foundation Technician.

President Steve Rockhold called the meeting to order at 4:00 p.m.

Guest Speaker: Lauren Bates, who has been selected as the Student Speaker for NWC's Commencement Ceremony on May 9th, presented her speech to the Board. She will be graduating with an A.S. degree in Outdoor Education, Recreation and Leadership and an A.A. degree in Political Science. Lauren has been active on campus working as an RA in Lewis and Clark Hall, serving as a peer mentor for the TRIO (student support services) program and participating in the Outdoor Club. She is from Lovell.

Consent Agenda: President Steve Rockhold asked for approval of the consent agenda. There were no questions or comments. David Northrup moved to approve the agenda. Charlotte Patrick seconded the motion. The motion passed.

Committee Work/Board Action:

Donor Accountability and Stewardship – Jacque Michel reviewed the press release from Northwest College announcing that the Foundation and Northwest College are partnering to cover the tuition increase for new and continuing degree-seeking students enrolling in the 2026-2027 school year. The program will be called the Northwest College Bridge to Success Grant. The Trapper Scholarship will also expand to support more students by removing caps on the number of awards for the BAS, AA, AAS, and AS degrees, so more eligible students can benefit.

Development Committee – Dave Bonner introduced the committee's work to identify the Foundation's next fundraising projects. The question of how the Foundation can best support Northwest College was presented to the board for discussion. NWC President Lisa Watson provided the board with background information on several topics.

The areas identified for possible current focus are:

- **General Scholarships** – There is an anticipated half-million dollar overrun on scholarships that could be needed from NWC reserves. Even though the resulting increase in students will return new FTE funding to NWC, it would be beneficial to have more actual dollars to pay for these awards. The goal would be to initiate fundraising for general scholarships to support NWC recruiting. President Watson said the risk of an overrun on funds is worth the reward of increased enrollment.
- **Athletic Scholarships** – The Foundation continues its Trapper Champions fundraising for endowed scholarship support. Athletes boost student enrollment and the Foundation's goal is to generate more independent revenue for athletic recruitment.
- **Affordability Grants** – help fill the financial gap for low-to-moderate income students, making college more affordable.
- **Residence Hall Renovations** – NWC's student residence halls are worn and outdated. Modern facilities support student recruitment. Is it feasible to support smaller updates vs a large-scale project?
- **Career and Technical Education Center** – Workforce development continues to offer options with plumbing, HVAC, and electrical education, plus adding programs in construction trades, heavy equipment operation, and CDL. President Watson noted that there is a strong push for CTE right now and a lot of grant money is available.
- **Academic Program Development** – Through regional needs assessment work with Hanover Research, some potential program ideas have been identified, but the College is still evaluating the ROI on specific options. President Watson said the college has a program review process and is working on program development but noted they are still evaluating which specific program areas to develop. Hopefully, this will provide fundraising opportunities in the future.

Continued long-term focus:

- Endowed Faculty Positions
- Visual and Performing Arts Facility – President Watson noted the new VPA building is in level 2 planning and will be up for level 3 approval at the legislature in 2028.
- Legacy Giving – planting seeds for planned gifts is a long-term pay off. These gifts develop slowly over time.

The Foundation staff will use input from discussion of the various options at the Board meeting to inform and prioritize their annual fundraising plan for FY27.

Governance – Bryan Lee discussed new board member nominations. As a long-standing board member, Bryan shared the positive experiences he's gained from the Board as encouragement for folks to nominate potential new board members. Shelby Wetzel added some demographic information noting we want representation from the various communities NWC serves. She highlighted that with recent turnover we are lacking in directors from Cody, our female proportion has declined, and we could stand to target a younger population or folks still actively engaged in work or careers. Board members are asked to fill out the form in the board packet or email Shelby with nominations. Elections will take place at the July board meeting.

Development Report:

Giving Day Wrap-up – Alumni & Development Coordinator Jill Hartmann recapped Giving Day 2026 by reporting that the campaign raised over \$189,000 from 318 donors. Jill expressed the Foundation team's appreciation to NWC Student Senate for sponsoring the first ever Student Scavenger Hunt and to President Watson and the Vice Presidents for their participation in "Clear the Path for Student Access". This new, on-campus initiative raised \$2,400 from faculty and staff to support Affordability Grants. Finally, she thanked the matching and challenge donors who supported Giving Day including many board members.

AI Fundraising Agent – Development Manager Cory Ostermiller introduced board members to the Foundation's new digital development partner, Trapper Sam. The Foundation is one of 35 organizations nationwide taking part in a pilot program to use AI for outreach purposes to engage non-donors and infrequent donors. Sam can be trained in the Foundation's voice, messaging, and tone. When Sam is ready to begin communication, it will begin slowly and thoughtfully, so we can make adjustments in real time, and proceed gradually. Cory noted that this tool will expand the reach of a small development team, help ensure no donor "falls through the cracks", and build stronger connections with alumni and the community.

With no other business to conduct, President Steve Rockhold adjourned the meeting at 5:11 p.m.

Minutes

Following the formal Board meeting, the Foundation hosted a joint board reception with the NWC Trustees and Alumni Association board members. The event was held at Nelson House.

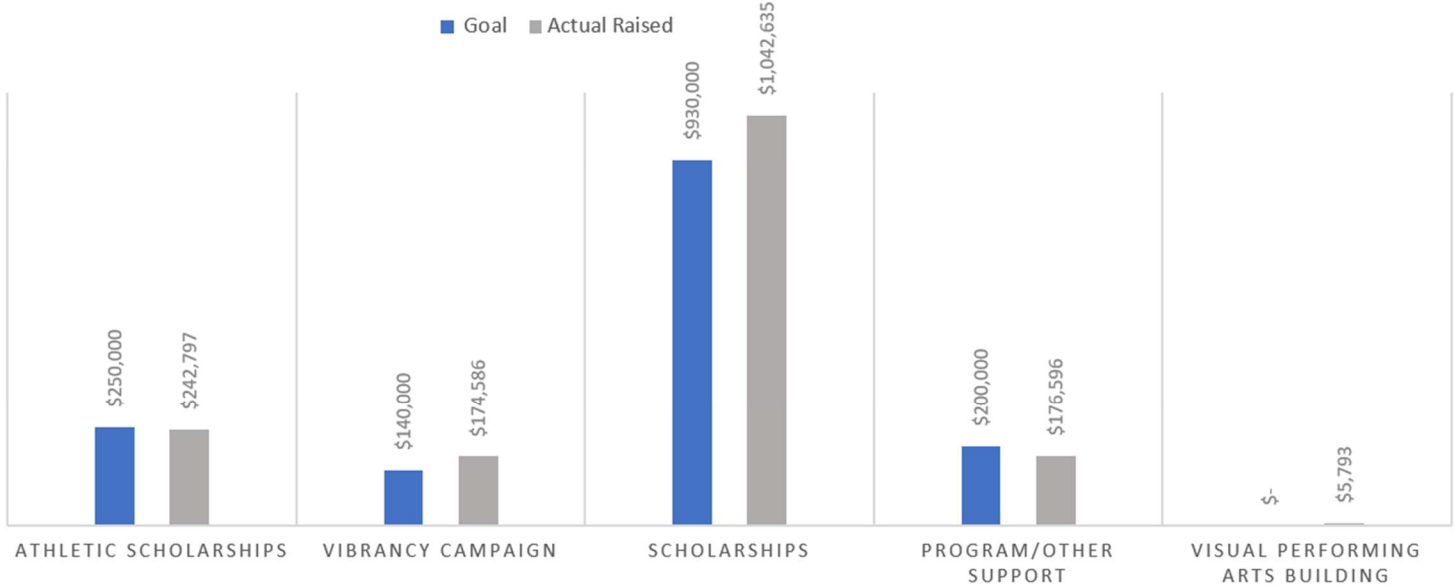
Sarah Johnson, Secretary

Approved: Steve Rockhold, President

NWC Foundation Dashboard

June 30, 2026

FY2026 FUNDRAISING CAMPAIGN PROGRESS



Donor Retention

(donors that gave last year and this year)

Year	Retained Donors	Retention %	Goal	Revenue Retained
FY 2026	612	57.52%	60%	\$1,074,445

Donor Acquisition

(new donors and donors that have not given in the last 5 years)

Year	Acquired Donors	Donor Acquisition %	Goal	Acquisition Revenue
FY 2026	350	13.57%	15%	\$295,281

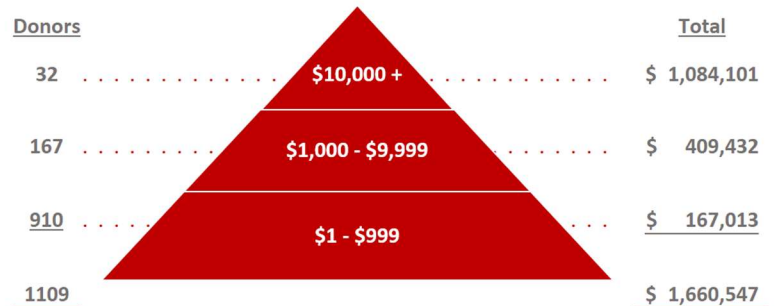
Donor Recapture

(donors that have not given in the past 15 months but gave in the last 5 years)

Year	Recaptured Donors	Recapture %	Goal	Revenue Recaptured
FY 2026	137	11.80%	15%	\$294,304

Giving Levels	No. of Donors	Total Gifts
\$10,000 and above	32	\$ 1,084,101
\$1,000 - \$9,999	167	\$ 409,432
\$500 - \$999	138	\$ 78,901
\$250 - \$499	119	\$ 36,679
\$100 - \$249	288	\$ 39,208
\$50 - \$99	147	\$ 8,137
\$1 - \$49	218	\$ 4,088
	1,109	\$ 1,660,547

Donor Pyramid



Northwest College Foundation FY2026 Fundraising Goals

	2026	2026	2026	2025
<u>Program Fundraising</u>	<u>Fiscal Year Actual</u>	<u>Fiscal Year Goals</u>	<u>Fiscal Year %</u>	<u>Fiscal Year Actual</u>
Athletic Scholarships	\$ 242,797.10	\$ 250,000.00	97.12%	\$ 235,676.15
Vibrancy/Student Center Campaign	\$ 174,585.92	\$ 140,000.00	124.70%	\$ 224,946.00
Scholarships/Affordability Grants	\$ 1,042,634.87	\$ 930,000.00	112.11%	\$ 923,483.34
Program/Other Support	\$ 176,595.63	\$ 200,000.00	88.30%	\$ 326,829.82
Visual Performing Arts Center	\$ 5,793.08	\$ -	0.00%	\$ -
Gift-in-Kind Contributions	\$ 18,140.00	\$ -	0.00%	\$ 313,418.59
Fundraising Total	\$ 1,660,546.60	\$ 1,520,000.00	109.25%	\$ 2,024,353.90

	2026	2026	2026	2025
<u>Appeal Tracking</u>	<u>Fiscal Year Actual</u>	<u>Fiscal Year Goals</u>	<u>Fiscal Year %</u>	<u>Fiscal Year Actual</u>
Athletics - Team Projects	29,163.88	25,000	116.66%	27,045.31
Athletics - Trapper Booster Club	60,979.32	55,000	110.87%	54,277.92
Fiscal Year End Appeal	9,028.78	-	N/A	-
Foundation Events	7,599.00	10,000	75.99%	60,946.13
Friends of Music	12,100.31	8,000	151.25%	8,487.12
General Support	51,475.53	25,000	205.90%	51,427.90
Giving Tuesday	4,097.09	3,000	136.57%	4,051.48
Gift-in-Kind	18,140.00	-	0.00%	27,269.59
Individual Solicitation	735,537.58	700,000	105.08%	691,025.88
Memorials	11,672.74	10,000	116.73%	42,793.17
Outside Projects	43,578.65	35,000	124.51%	34,044.23
Pass-through/Named	44,225.00	50,000	88.45%	52,500.00
NWC Giving Day	185,100.18	200,000	92.55%	225,970.96
Planned Giving - New Estate Gifts	216,178.72	200,000	108.09%	531,496.13
Planned Giving - Recurring Estate Gifts	40,323.83	40,000	100.81%	40,928.87
Stethoscopes for Students	4,149.28	5,000	82.99%	4,611.15
WyoGives	7,292.68	4,000	182.32%	-
Year-End Giving	179,904.03	150,000	119.94%	167,478.06
	\$ 1,660,546.60	\$ 1,520,000.00	109.25%	\$ 2,024,353.90
Minus State of Wyoming Match	\$ 143,560.00	\$ 200,000.00	71.78%	\$ 500,000.00
Fundraising Total	\$ 1,516,986.60	\$ 1,320,000.00	114.92%	\$ 1,524,353.90

	FY2026 Actual	FY2026 Goals	FY2026 %	FY2025 Actual
<u>Participation Goals</u>				
Total Number of Donors	1109	1150	96.43%	1007
Donor Acquisition	13.57%	15%	90.47%	11.83%
Donor Recapture	11.80%	15%	78.67%	13.30%
Donor Retention	57.52%	60%	95.87%	50.74%
Alumni Donors	483	510	94.71%	443
Employee Donors	117	115	101.74%	102
Increase payroll givers	72	85	84.71%	79
Employee participation	67.05%	65%	103.15%	58.96%
Increase Presidential Partners	191	220	86.82%	177
Key Leadership participation	97.37%	100%	97.37%	97.44%
Foundation Board participation	100.00%	100%	100.00%	100.00%



NWC Foundation Fundraising Report by Month

FY 2026

Reference	July	August	September	October	November	December	January	February	March	April	May	June	Total
CGA	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Endowed Funds	\$ 20,749.57	\$ 14,532.92	\$ 29,535.64	\$ 97,934.50	\$ 45,606.58	\$ 320,989.90	\$ 267,613.89	\$ 134,062.72	\$ 122,842.06	\$ 53,915.42	\$ 47,379.66	\$ 23,560.78	\$ 1,178,723.64
Unrestricted Funds	\$ 1,137.21	\$ 495.04	\$ 615.24	\$ 781.60	\$ 2,096.13	\$ 5,952.53	\$ 785.06	\$ 619.76	\$ 3,627.43	\$ 620.65	\$ 5,201.11	\$ 826.80	\$ 22,758.56
General Scholarships	\$ 659.00	\$ 248.84	\$ 174.00	\$ 174.00	\$ 749.00	\$ 899.00	\$ 224.00	\$ 5,174.00	\$ 3,524.00	\$ 190.00	\$ -	\$ 280.00	\$ 12,295.84
Restricted Scholarships/Funds	\$ 17,250.00	\$ 52,741.00	\$ 29,375.00	\$ 43,020.00	\$ 35,475.00	\$ 25,009.05	\$ 17,525.00	\$ 35,808.92	\$ 71,174.00	\$ 31,239.00	\$ 9,995.00	\$ 10,106.59	\$ 378,718.56
Directed Program Funds	\$ 2,027.50	\$ 27.50	\$ 27.50	\$ 27.50	\$ 77.50	\$ 27.50	\$ 8,277.50	\$ 14,277.50	\$ 12,657.50	\$ 27.50	\$ -	\$ 55.00	\$ 37,510.00
Program Scholarships	\$ 200.00	\$ 150.00	\$ 150.00	\$ 475.00	\$ 2,625.00	\$ 2,900.00	\$ 700.00	\$ 200.00	\$ 3,400.00	\$ 200.00	\$ 1,000.00	\$ 400.00	\$ 12,400.00
Sub Total	\$ 42,023.28	\$ 68,195.30	\$ 59,877.38	\$ 142,412.60	\$ 86,629.21	\$ 355,777.98	\$ 295,125.45	\$ 190,142.90	\$ 217,224.99	\$ 86,192.57	\$ 63,575.77	\$ 35,229.17	\$ 1,642,406.60
GIK's	\$ -	\$ 1,740.00	\$ 13,600.00	\$ -	\$ -	\$ 2,500.00	\$ -	\$ -	\$ 300.00	\$ -	\$ -	\$ -	\$ 18,140.00
Grand Total	\$ 42,023.28	\$ 69,935.30	\$ 73,477.38	\$ 142,412.60	\$ 86,629.21	\$ 358,277.98	\$ 295,125.45	\$ 190,142.90	\$ 217,524.99	\$ 86,192.57	\$ 63,575.77	\$ 35,229.17	\$ 1,660,546.60
% of Total	2.53%	4.21%	4.42%	8.58%	5.22%	21.58%	17.77%	11.45%	13.10%	5.19%	3.83%	2.12%	
Cumulative	\$ 42,023.28	\$ 111,958.58	\$ 185,435.96	\$ 327,848.56	\$ 414,477.77	\$ 772,755.75	\$ 1,067,881.20	\$ 1,258,024.10	\$ 1,475,549.09	\$ 1,561,741.66	\$ 1,625,317.43	\$ 1,660,546.60	



NWC Foundation Fundraising Report by Month

FY 2025

Reference	July	August	September	October	November	December	January	February	March	April	May	June	Total
CGA	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Estate Gifts	\$ -	\$ -	\$ 285,549.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 145,947.13	\$ -	\$ -	\$ -	\$ 431,496.13
Endowed Funds	\$ 18,163.30	\$ 125,391.85	\$ 133,043.86	\$ 102,887.53	\$ 66,050.66	\$ 255,541.60	\$ 67,138.30	\$ 43,707.17	\$ 135,343.98	\$ 9,916.45	\$ 58,997.21	\$ 17,164.00	\$ 1,033,345.91
Unrestricted Funds	\$ 218.51	\$ 314.14	\$ 286.00	\$ 3,374.21	\$ 2,258.76	\$ 8,645.44	\$ 3,665.16	\$ 923.70	\$ 1,007.94	\$ 6,085.20	\$ 614.43	\$ 1,822.56	\$ 29,216.05
General Scholarships	\$ 105.00	\$ 105.00	\$ 100.00	\$ 1,175.00	\$ 875.00	\$ 850.00	\$ 110.00	\$ 110.00	\$ 5,250.00	\$ 929.00	\$ 194.00	\$ 934.00	\$ 10,737.00
Restricted Scholarships/Funds	\$ 13,987.00	\$ 100,596.00	\$ 27,963.00	\$ 23,923.00	\$ 19,508.86	\$ 44,756.00	\$ 37,831.50	\$ 24,305.00	\$ 113,672.86	\$ 18,397.00	\$ 9,215.00	\$ 12,640.00	\$ 446,795.22
Directed Program Funds	\$ 10.00	\$ 10.00	\$ -	\$ -	\$ -	\$ 275.00	\$ 777.50	\$ 10,327.50	\$ 19,685.00	\$ 1,055.00	\$ 31.50	\$ 27.50	\$ 32,199.00
Program Scholarships	\$ 45.00	\$ 45.00	\$ 845.00	\$ 395.00	\$ 845.00	\$ 3,995.00	\$ 25.00	\$ 25.00	\$ 6,100.00	\$ 75.00	\$ 175.00	\$ 125.00	\$ 12,695.00
Sub Total	\$ 32,528.81	\$ 226,461.99	\$ 447,786.86	\$ 131,754.74	\$ 89,538.28	\$ 314,063.04	\$ 109,547.46	\$ 79,398.37	\$ 427,006.91	\$ 36,457.65	\$ 69,227.14	\$ 32,713.06	\$ 1,996,484.31
GIK's	\$ 290.00	\$ 2,630.59	\$ 15,075.00	\$ -	\$ 500.00	\$ 6,977.00	\$ -	\$ -	\$ -	\$ 2,097.00	\$ 300.00	\$ -	\$ 27,869.59
Grand Total	\$ 32,818.81	\$ 229,092.58	\$ 462,861.86	\$ 131,754.74	\$ 90,038.28	\$ 321,040.04	\$ 109,547.46	\$ 79,398.37	\$ 427,006.91	\$ 38,554.65	\$ 69,527.14	\$ 32,713.06	\$ 2,024,353.90
% of Total	1.62%	11.32%	22.86%	6.51%	4.45%	15.86%	5.41%	3.92%	21.09%	1.90%	3.43%	1.62%	
Cumulative	\$ 32,818.81	\$ 261,911.39	\$ 724,773.25	\$ 856,527.99	\$ 946,566.27	\$ 1,267,606.31	\$ 1,377,153.77	\$ 1,456,552.14	\$ 1,883,559.05	\$ 1,922,113.70	\$ 1,991,640.84	\$ 2,024,353.90	

FY2026 NWC Foundation Work Plan

Strategic Goal/Priorities:

Pillar 1: Infrastructure

Build a top-performing advancement organization with a culture of collaboration and continuity for the future.

Strategy 1: Recruit, develop and retain first-rate employees to ensure organizational continuity.

- Goal 1** Implement Fundraising Performance Management system.
- Establish fundraising staff goals and tracking for contacts and proposals.
 - Conduct monthly Prospect Reporting meetings
- Goal 2** Promote teamwork among employees, nurturing positive office environment and work redundancy.

Responsibility:

Timeline:

Status:

- Executive Director FY26 Done
Staff FY26 Yes
FR Staff Ongoing Yes
Executive Director Ongoing Collaborative work plan;
Celebrated milestones together

Strategy 2: Recruit and engage Board members in support of the Foundation.

- Goal 1** Enhance Board member development and participation via education and mentoring.
- Conduct Small Group Discussion among the Board.
 - Maintain 100% participation in giving from the Board
- Goal 2** Administer semi-annual Board performance evaluation.
- Goal 3** Engage all committees in strategic work for the Foundation.
- Goal 4** Promote social connections and involvement with NWC activities among Board members.
- Host social hour following July meeting; welcome new NWC VPs
 - Host a social hour for directors and spouses; Include Presidential Partners

- Governance Comm/Staff Ongoing Annual tactics
ED/Governance Comm Fall 2025 Completed
Board Ongoing Yes
Governance Comm/Staff Winter 2026 Completed
ED/Board Annual tactics Completed
Governance Comm/Staff Annual tactics Ongoing
Staff Summer 2025 Completed
Staff Holiday 2025 May PP event Art/Photo instead

Strategy 3: Implement Foundation strategic plan to accomplish long-term goals and drive operations forward.

- Goal 2** Monitor and implement operational best practices using CASE's Foundation Management and Governance Checklist.
- Goal 3** Complete policy and procedures manual.
- Goal 4** Maintain communications with the College's leaders to support NWC mission, vision, and priorities.
- Serve as member of NWC President's Staff; assist with Strategic Planning
 - Assist in grant development to sustain programs at NWC.
 - Participate in planning to identify future fundraising priorities.

- Governance Comm/Staff Annual checklist review Ongoing
ED/Board Policy review FY24-26; manual development FY27/On track
ED/Board Ongoing
Executive Director FY26 Yes
Executive Director FY26 Yes
Executive Director FY26 Yes

Pillar 2: Involvement

Engage NWC students, alumni, and friends of the College in meaningful relationships that inspire pride and giving for NWC.

Strategy 1: Develop and implement major fundraising initiatives anchored in NWC priorities.

- Goal 1** Expand philanthropic support to NWC, averaging \$1.5 million or more raised annually, inclusive of all fundraising activity.
- Launch fundraising for new Affordability Grant Program; raise \$200,000
 - Conduct Feasibility Study for VPA Building
- Goal 2** Aim to raise more money each year than previously secured to pace with inflation.
- Goal 4** Conduct Trapper Champions Athletic Scholarship fundraising raising \$150,000 (gifts and pledges) to endow scholarships.
- Revisit Athletic Fundraising Plan and scholarship budgets
- Goal 5** Advocate for matching funds from the State of Wyoming.
- Utilize a portion of current matching money secured through NWC.

- ED/Staff/Board Annual tactics Raised \$1,660,547
Staff/Board FY26 Raised \$170,000
Staff/Board FY26 Developed consultant RFP; delayed by NWC
ED/Staff/Board Ongoing Did not surpass last year
FR Staff/Athletic Director Annual tactics Raised \$238,000 for athletics/ \$151,000 for scholarships
Staff/Board/TBC FY26 Met with VP and AD, no movement on plan; revamped Athletics budgets
Staff/Board/NWC President Annual tactics No activity at the commission or state level for matching \$
FR Staff FY26 Secured \$143,500

Strategy 2: Enhance annual giving pipeline to increase support for the College.

- Goal 1** Grow participation in NWC Giving Day by raising a minimum of \$200,000 from 300 donors annually.
- Goal 2** Increase donor acquisition, recapture and retention through focused donor relations and stewardship.
- Conduct follow-up to donors at risk of lapsing.
- Goal 3** Leverage/grow partnerships with program-related industries for scholarships, equipment, or support, especially CTE.

- FR Staff Annual tactics \$189,000/318 donors
FR Staff Annual tactics Actual: acquisition, 13.57%; recapture, 11.80%; and retention, 57.52%
FR Staff FY26; Annual tactics Conducted Lapsed donor outreach at fiscal year-end
Staff/Board/NWC FY26; Annual tactics Worked CTE prospects with Giving Day

Strategy 3: Promote the impact Transformational Gifts bring to Northwest College.

- Goal 1** Enhance Planned Giving marketing program.
- Incorporate 5 to Thrive messaging into PG marketing
- Goal 2** Develop and grow relationships with area PG advisors (attorneys, CPAs, investment advisors, realtors, insurance agents, etc.).
- Distribute flyer specialized for advisors; conduct follow-up to key partners
- Goal 3** Share legacy stories to seed ideas for others.
- Goal 4** Promote opportunities for endowed faculty (or other) positions.
- Work with Healthcare Partners to develop new endowed position

- ED/Staff Annual tactics Conducted Survey to PG prospects
FR Staff FY26 Yes
Development Comm/Staff Annual tactics
FR Staff FY26 Completed
Development Comm/Staff Ongoing Included in mailers and added to TrapperLink (with other Scholarship donors)
Staff/Board/NWC Annual tactics Conducted second three-year cycle Named Chair selection process on campus
ED/Staff FY26 Not financially viable at this time

Strategy 4: Strengthen interaction/communication between Foundation, Alumni Association, and Trapper Booster Club boards to promote shared engagement and align work.

- Goal 1** Host annual gathering for the three volunteer Boards along with the College's Board of Trustees.
- Host reception for groups prior to NWC event
- Goal 2** Collaborate regarding community engagement with AA and TBC Boards.
- Support Alumni Activities - events, mentoring, merchandise sales, communications.
 - Collaborate with TBC - events, memberships/banners, game-day activities.

- Development Comm/Staff Ongoing
Staff/Board FY26 Completed with Board meeting
Staff/Board Annual tactics Ongoing work
Jill Ongoing 2 outreach and 2 student events; 7 mentor pairs; increased news frequency
Cory Ongoing Consistent partnership for programming

Pillar 3: Investment

Ensure sound stewardship of resources through prudent investment management and alignment of assets in support of NWC priorities.

Strategy 1: Provide quality management of NWC Foundation assets.

Goal 1	Monitor or streamline systems to steward the Foundation's investments and support financial operations.	Finance Comm/Staff	Ongoing	
a.	Complete transition to more passive investment management to gain efficiency with fees	Finance Comm/Staff	FY26	Completed transition; estimated to save ~\$225,000 in investment fees with better returns
Goal 2	Facilitate timing of annual payments to NWC to maximize resources.	ED/Finance Comm/Staff	Ongoing	Payment withdrawals timed well; ongoing discussion at meetings
Goal 4	Work with donors to adjust scholarship/endowment criteria so funding can serve the College's needs.	ED/Staff	Annual tactics	Updated criteria to meet federal DEI regulations; also added more flexibility
Goal 5	Collaborate with the College regarding endowment management for NWC operations (workforce development, professional development)	ED/Staff/NWC	Annual tactics	
a.	-Establish a variety of new quasi-endowments with NWC.	Executive Director	FY26	Developed Quasi MOU template; Received \$5,180,000 for 2 endowments; more to come

Strategy 2: Increase NWC Foundation's Unrestricted resources to build financial flexibility for operations.

Goal 1	Evaluate unrestricted assets as a financial base for operations.	Finance Comm/Board		Tracking quarterly unrestricted cash balance
a.	-Complete Operating Reserve Policy	Staff/Board	FY26	Completed
b.	-Increase cash reserves annually	Staff/Board	Ongoing	Ongoing progress

Pillar 4: Impact

Strengthen donor connections by demonstrating appreciation and accountability and showcasing the effect of giving on academic innovation and student success at NWC.

Strategy 1: Build Foundation/Alumni Brand via enhanced marketing efforts.

Goal 3	Create an annual communications plan to raise awareness of the Foundation's work and accomplishments.	Staff/Board	Annual tactics	Completed
a.	Contract with Graphic Designer/Marketing Firm to complete projects	Staff	FY26	Worked with Vision West to update branding and develop collaterals

Strategy 2: Steward donors and the resources they provide to support NWC.

Goal 1	Express appreciation to donors at levels appropriate to respective giving.	DA&S Comm/Staff	Ongoing	Always a work in progress
a.	-Explore options for New Donor and Welcome Back communications	Jill	FY26	Not completed
Goal 2	Complete donor profiles for all named scholarships managed by the Foundation.	Staff/with writing help?	FY24-FY28	Completed 57 profiles; 223 of 329 done
Goal 4	Provide accountability to donors through reporting regarding use of funding.	Staff	Ongoing	Endowment reports; student thank you letters

Strategy 3: Improve partnerships with NWC departments/programs/employees.

Goal 1	Implement 'account executive' linkages with designated campus areas to enhance information flow and program knowledge.	FR Staff	Ongoing	Completed
a.	-Collaborate with NWC program areas to identify departmental projects for Giving Day.	FR Staff	FY26	Completed
b.	-Participate in college-wide activities such as Kick-off Weekend, Paint the Town Red and Graduation	Jill	Annual tactics; FY26	Completed
Goal 2	Identify successful alumni to showcase and/or recruit as program ambassadors.	Staff/NWC	Ongoing	Identified 3 alumni profile options for NWC
a.	-Provide alumni volunteers for student recruitment events and Trappers Give Back Day.	Jill	FY26	6 volunteers for Preview Day 3 campus project with 60+ volunteers for inaugural GB Day

Development Manager Report

Cory Ostermiller
July 2026

Foundation Work

- Beginning work with Jill and Shelby to produce the fiscal year 2025 Annual Report which will be distributed in August.
- Assisting with recruitment of candidates for the foundation board of directors.
- Continue work on scholarship profile project.
- Continue to initiate top donor solicitations and seeking pledges for general/named scholarships and programs.
- Focusing on stewardship activities and promoting good will and accountability to donors.
- Working on donor portfolios to stage prospects and target for future asks with a focus on new named 'general' scholarships.
- Develop and assign prospects for specific initiatives.
- Continued work with the Development and Governance committees.
- Continue work with Blackbaud representative to complete onboarding process for new Development Agent 'Trapper Sam'.
- Looking to make a minimum of three contacts per day with both pools. Relationship Manager and Prospect Pipeline.

Athletics

- Working on targeted Athletic scholarship prospects to support recruiting student athletes.
- Continue planning for the 2026 Trapper Bonanza Golf tournament, dinner, and Calcutta. Working with AD Brian Erickson to secure sponsors for golf events. This year's tournament will once again be held in conjunction with Paint the Town Red weekend in August.
- Working to promote and renew Athletic banner and Game Day sponsors for the 2026-2027 season.
- The Booster Club membership mailing is scheduled for the end of July.

Misc.

- Supporting Jill Hartmann with the Alumni Association, annual giving, alumni programming and employee giving.
- Contributing to the Foundation publications/newsletters such as TrapperLink, TrapperConnect etc.
- The Trapper Classic Car Show took place on June 27 and was once again a great success.

Northwest College Foundation Donor Accountability and Stewardship Committee Minutes from July 8, 2026

Jacque Michel, chair, called the meeting to order. Other participants were Clay Cummins, Carolyn Danko and Casey Sorenson; plus, Shelby Wetzel, Executive Director and Jill Hartmann, Alumni and Development Coordinator.

Jill Hartmann opened the meeting by reporting on some recent stewardship activities. The Presidential Partners event held in conjunction with NWC's Art and Photography programs was well received by both donors and the faculty and students whose creative work was showcased and appreciated. She also shared a recent email message and photo gallery sent to 47 individuals who contributed funding for Residence Hall Renovations several years ago. Between the pandemic and then campus water damage in halls that changed the work priorities, this project(s) has evolved and dragged on for many years. It's nice to finally close the loop and showcase some real progress for the investment people made at NWC!

Shelby reported that 57 Scholarship Donor Profiles were completed in FY26, bringing the overall total to 223 (out of 329), which is 68% towards our overall goal by the end of FY28.

	<u># Complete</u>	<u>Total</u>	<u>%</u>	
Oct-23	77	297	26%	
FY24	108	297	36%	31 completed
FY25	166	313	53%	58 completed
FY26	223	329	68%	57 completed
	106	left		

Directors provided input to the Governance Committee's FY27 Strategic Goals in preparation of the upcoming Foundation Annual Work Plan. There is some additional work to be done in transitioning the last few publications (Scholarship Introduction brochure, Donor Postcards, etc.) to our new graphic look. Mr. Sorenson mentioned using student videos in some sort of donor stewardship activity in the future. Promoting visibility for the Foundation and plus enhancing relationships on campus is an important aspect of our stewardship work.

The meeting was adjourned.

Shelby Wetzel, NWC Foundation Executive Director

Northwest College Foundation

Executive Committee Minutes from July 16, 2026

President Steve Rockhold called the meeting to order. Other committee members present were Tim Hopkins, Stan Lundberg, Jacque Michel and Trace Paul. Also attending was Shelby Wetzel, executive director, and Lisa Watson, NWC president.

Executive Committee members gathered to conduct an annual performance review with Executive Director Shelby Wetzel. Steve Rockhold asked Ms. Wetzel to provide a brief overview of the year. She noted another solid fundraising year and good performance against most of the metrics identified by the Executive Committee. Contributions were down slightly for Giving Day and the team missed its mark a bit with Affordability Grants. She believes economic conditions are impacting giving. Donor retention is still a challenge with lower numbers than she would hope for as well. Committee members commended Shelby for her continued good work.

Shelby and Tim Hopkins will prepare her individual goals for the coming year following the staff's completion of its annual work plan.

Ms. Wetzel addressed the need to update her contract. President Lisa Watson expressed that NWC will be providing employees with whichever is greater of \$3,500 or 3.5% pay raise. Ms. Wetzel stated she would be pleased to receive the 3.5% increase and an additional step in the 10-year deferred compensation plan developed in 2018 to provide incentive for her continued employment. Tim Hopkins moved to increase Shelby's salary by 3.5% (to \$144,972) and extend the additional \$1,000 in deferred compensation/retirement (from \$13,000 to \$14,000 for 2027). Trace Paul seconded the motion, and it passed unanimously.

Last year, Shelby was asked to identify aspects of her job that will need to be transitioned or backed up to prepare for a future leadership transition as she prepares to retire in the next couple of years. She developed a Succession Plan Framework for the committee to review that assesses core competencies (broader level thinking) of a position along with technical competencies (specific skills). Once identified, plans can be made to develop these competencies in other employees to ensure there is proper coverage left behind and ensure a smooth transition when the time arises. Ms. Wetzel also noted she is beginning to transition things like her computer files into more central systems where others can access and share information. The group praised the planning and forethought Shelby is investing in this work. Lisa Watson noted her appreciation as well but expressed that we should not pressure Shelby so much that she feels people are pushing her to leave before she is ready.

The last item of business related to the College's need for a piece of Foundation land north of the Soccer Fieldhouse for a new Outdoor Education aerial ropes course. President Watson asked for general approval so NWC can move forward with some engineering on the property. The Executive Committee gave the go ahead and asked that this topic be shared with the Real Estate group and added to the upcoming meeting agenda.



**Northwest College Foundation
Finance Committee Meeting Minutes**

July 16, 2026

**Present in person: Steve Rockhold, David Northrup, Mike McDaniel, Tim Hopkins, Shelby Wetzel, Dillon Jeffs,
Brian Bentley (Morgan Stanley)**

Present online: Tyler Yates

The meeting was called to order at 1:01 PM

1. The meeting began with Brian Bentley going over the quarterly and annual investment performance. As of 6/30/2026 the Foundation had over \$60 million in our Morgan Stanley investment accounts, plus approximately \$1 million in our general account with Morgan Stanley held in treasuries for our next annual scholarship payment. Brian highlighted the trailing portfolio returns (annualized, net of fees) for the Foundation accounts:
 - a. Year-to-date return was 9.16%, Trailing 12-month return was 16.9%, 3-year return was 13.26%, 5-year return was 7.39%, 10-year return was 9.05%, and since inception in 2008 our annualized return is 7.17%.

We are currently in compliance with our investment policy, with an allocation of 78% in equities, 7.5% in alternatives (approximately 6% in real estate) and 14.5% in fixed income. After reviewing the performance and allocation, Brian went over our remaining active managers' performances. He noted that in the large cap value, Columbia underperformed its benchmark for the past year and they are monitoring it, but he didn't recommend liquidating it. He also noted that Lazard Emerging markets underperformed the listed benchmark, but the benchmark listed is not correct and it is outperforming our SPDR Portfolio Emerging markets ETF. The only other actively managed fund that was underperforming was Capital Group International. Brian recommended liquidating this position and replacing it with Vanguard's International Equities ETF (VEA). This move would save the Foundation approximately \$18,000 per year in investment fees. The committee briefly discussed and agreed with the recommendation, no motion was required.

Brian finished his report by discussing the market overview and forecast for the rest of the year. He is optimistic that the markets will remain strong, with the primary concern being inflation and potential for rising interest rates. However, the most recent inflation report was positive, and oil prices have stabilized.

2. The next part of the meeting focused on the Foundation's receipt of \$5,180,000 in quasi-endowed funds from Northwest College. Shelby explained that the College is setting up quasi-endowments to help create steady revenue streams to help fund specific purposes. The discussion was focused on the timing of investment of these funds. Initially the thought was to put \$1,500,000 into treasuries to help pre-fund next year's scholarship payment, but it was brought up that the College was planning on funding at least an additional \$4,000,000 later this year that we would be able to pull from for payments. Brian recommended moving \$1.25 million per month into the primary account and allocating it based on our investment policy. A motion was made by Tim to accept Brian's recommendation and seconded by Steve. Motion carried unanimously.

Shelby then opened a preliminary discussion on the strategy of the endowment management fee that we will assess on these quasi-endowments. We assess a 1.3% fee on the 3-year average market value, just as we do other every endowed fund we manage. Ordinarily this fee goes into the Foundation's unrestricted general fund to pay for the Foundation's operating expenses. Shelby presented the idea of creating a strategic initiative endowment fund where the Foundation could allocate the College's management fee from these quasi-endowments. Essentially, the fees would then accumulate and be invested back into projects supporting NWC rather than assessing the College for Foundation operations. No decisions were made as committee members want to think about the concept. Based on simple fee calculations provided by Dillon, the funds won't provide a full management fee until next year, so there is time to discuss and decide what to do with it.

3. In a continuation from the prior Finance Committee meeting, Shelby briefly went over the Foundation's annual strategic plan checklist noting that we completed our FY2026 goals of establishing an operating reserve policy and we are continuing to build our unrestricted cash reserves. Some discussion on goals for FY2027 ensued, highlighting a review of our investment policy statement and funding our General Fund endowment.
4. After Shelby finished the annual strategic plan check-in, Dillon quickly went over the quarterly unrestricted general fund overview. The report summarizes the quarter-end position and the quarterly activity of the unrestricted general fund's liquid assets. The report was not finalized, but the numbers were close to final. As of the end of June, the year-end unrestricted general fund cash balance was \$172,025.52 and the net activity was a surplus of \$143,223.34. Dillon briefly explained that the key thing to pay attention to here is that we ended the year with a surplus and increase in unrestricted cash and making good progress on building up those reserves.

With no other business, the meeting was adjourned at 1:50 PM

Dillon Jeffs, Foundation Accountant

Northwest College Foundation

Governance Committee Minutes from July 15, 2026

Megan Nickles, chair, called the meeting to order. Committee members attending were David Hill, Bryan Lee, Stan Lundberg, and Bret Reed. Also present were Shelby Wetzel, Executive Director, and Cory Ostermiller, Development Manager.

Shelby Wetzel introduced the Board's annual nominations work which includes officers as well as directors this year. There were limited nominations from the board, so the committee and staff worked to prepare the following slate:

President: Tim Hopkins

VP: Trace Paul

2nd VP: Megan Nickles

Secretary: Sarah Johnson (second term)

Asst. Sec: Jacque Michel (second term)

Treasurer: Stan Lundberg (second term)

Asst. Treas: Tyler Yates

The committee reviewed nominations and identified potential individuals to fill the open positions. Contact people were assigned to each candidate so that recruiting work can be completed in the next month. New directors will be voted upon at the Foundation's meeting on August 5.

Ms. Wetzel shared some summary information from the individual meetings she held with Foundation directors, particularly regarding how to better use Board member skills or what kind of training people desire. Board development options ranged from retreats to topical elements during meetings and special educational offerings for those who have need on various subjects. For now, the staff will determine if they can develop some educational modules (video, PowerPoint, etc.) that could have an extended life and be used/refreshed over time as Board members evolve. Other conversation centered on formalizing the mentoring program to provide it with more structure.

Directors provided input to the Governance Committee's FY27 Strategic Goals in preparation of the upcoming Foundation Annual Work Plan. This conversation flowed nicely from board development discussion. Completion of an online policy repository (think modern manual) and an electronic Board Member Directory are also included in the list of plans.

Ms. Nickles asked about providing red shirts or hats for Board members to wear to Paint the Town Red. Some folks ordered Giving Day T-shirts, but Ms. Wetzel said they could make another offering before the summer event on August 28.

Finally, Shelby noted she still needs to share the survey results from the Board Assessment to the full membership. She wants to do it now rather than include it in a meeting packet so directors can focus on it without the other meeting materials. Committee members agreed to this plan and asked her to seek input from others.

With no further business, the meeting was adjourned.

Shelby Wetzel, Executive Director

Executive Director Report for July 2026

Introduction

Over the last few months, you've heard or read discussion in minutes about the College establishing some Quasi-endowments with the Foundation to improve its cash management. This action finally happened in late June, and you'll find an added \$5 million on the Balance Sheet (Statement of Financial Position) when you look at the financials this quarter. You won't, however, see a corresponding transaction in the Statement of Activities as this money is not a donation to the Foundation and is netted out as a liability. This is just a start of funds we will eventually manage on behalf of the College.

As a strategic partner, we are happy to help produce higher, long-term revenue for NWC. We will earn a management fee from these endowments, and the goal will be to reinvest this money in future strategic initiatives for the College. You'll hear more about this concept as the Finance Committee develops its thoughts.

Impact Story

NWC Foundation just completed its second 'Giving Day' for 2026.



This is the second year we've participated in **WyoGives** – the statewide effort focused on rallying charitable support across the Wyoming. While our NWC Giving Day is still our primary pursuit, we don't want to NOT be part of the collective activity – especially when numerous community non-profits are joining together to educate and energize Powell and Park County residents.

We took a very low-key approach and limited our promotion to social media only. Our focus was on raising scholarships and featured students' testimonials regarding the value of scholarships to their educational experience. We raised over \$11,000 from nearly 30 donors.

Jill led efforts for the Foundation and even helped other smaller organizations get oriented to this type of online marketing campaign.

Foundation Headlines

Other highlights from our current work include:

- Trapper Scholarship awards are still being extended to students as part of the student recruitment cycle. The Foundation and College will have a better understanding of the financial commitment once school starts and students use the funds being offered.

- We're beginning work on the FY26 Foundation Annual Report and Honor Roll of Giving. Along with that will be preparation of individual Endowment Status Reports to donors of each named scholarship endowment or other endowed funds.
- We completed employee performance evaluations this summer as part of NWC's human resources management process.
- Cory, Jill and I attended the Wyoming Nonprofit Network Conference in Casper. We also gathered with other Wyoming Community Colleges as part of the meeting. The Executive Director's conversation revolved around state matching funds and some joint proposals to larger Foundations. I will keep you posted regarding how these topics evolve.
- I'm participating as a member of the President's Staff in NWC's FY27 Operational Plan development and working to ensure proper linkages for the Foundation. It also serves to keep me informed of developments at the College.
- I continue to participate as a member of NWC's Grants Leadership Team related to strategy development and help ensure complimentary focus for the Foundation in the process.
- The Nott House rental property turned over again this summer. The new tenants seem to be a good fit for the home and will hopefully be stable for a longer time frame.
- Diedre and I both serve on the Paint the Town Red committee. We're gearing up for a tremendous town-gown celebration of a new academic year. Please join us if you can on Friday, Aug. 28. The Alumni Association will be hosting a beer garden for everyone to enjoy.

Fundraising Focus

Summer is when we wind down one fiscal year and look to the next cycle.

This meeting packet is filled with information about last year's accomplishments and our vision of the future. We're still waiting for NWC to point to the next 'big thing' so in the meantime, our focus is on STUDENTS and mostly scholarships. There really is no better inspiration.

As always, I look forward to working with each of you to reach the Foundation's goals.



Shelby Wetzel
Executive Director

Northwest College Foundation

Development Committee Minutes from July 16, 2026

Dave Bonner, chair, called the meeting to order. Committee members participating were R.J. Kost., Trace Paul and Sarah Johnson. Shelby Wetzel, Executive Director, Cory Ostermiller, Development Manager, and Jill Hartmann, Alumni and Development Coordinator, were also in attendance.

Committee members reviewed current statistics regarding Key Leadership giving during FY26 and were pleased to note we reached the 100% participation level from Foundation Board members before June 30. This is a point of pride to be celebrated at the upcoming meeting!

Following the review of potential fundraising projects and some framework discussion with President Watson at the last full Board meeting, Shelby grouped ideas into categories for the Development Committee as follows:

- Proposed FY27 Foundation fundraising focus areas (scholarships, affordability grants, residence halls)
- Areas that are better suited to individual donor interests (endowed chairs, legacy giving)
- Future project areas to be developed with NWC or left for specific grants (academic projects).

Information regarding the first two bullets will be detailed in the Foundation's upcoming annual work plan, including matching gift incentives to help drive donor response.

The Visual and Performing Arts building is on hold pending elections results and the College's future plans. At the most, our work for the coming year would include initiating an RFP process to select a consultant for the fundraising feasibility study next spring.

Ms. Wetzel shared that there is interest among the community college foundation executive directors to start a dialogue with the presidents and commission about seeking additional State Matching Funding. We want to encourage a thoughtful plan and not end up with last-minute legislation that is poorly constructed which leads to operational confusion.

Lastly, Directors provided input to the Development Committee's FY27 Strategic Goals in preparation of the upcoming Foundation Annual Work Plan. Many of the metrics are standard measures that the group doesn't want to stray from. Much of the discussion revolved around how to engage new donors and/or younger people.

Shelby Wetzel, NWC Executive Director

Alumni & Development Coordinator Report

Jill Hartmann | August 2026

Annual Giving

- Engaged in donor cultivation through birthday emails.
- Updated Stethoscopes for Students campaign mailer and distributed to over 1500 addresses.
- Assisted with hosting Presidential Partners Appreciation Reception in May.
- Distributed Stethoscopes for Students to Paramedic Cohort.
- Coordinated planning and mailing of Summer 2025 NWC 4 Life retiree newsletter.
- Facilitated design and distribution of May 2026 Planned Giving postcard.
- Executed new fiscal year end campaign offering matching gifts to lapsed or at-risk-of-lapsing donors.
- Designed campaign communications for WyoGives 2026 and collaborated with eight other Powell nonprofit organizations to promote “The Power of One Powell”.

Alumni Programming

- Served on Graduation Planning Committee and organized distribution of Alumni tote bags to all graduates.
- Coordinated the annual Distinguished Alumni Luncheon honoring the 2026 Distinguished Alumna, Raylee St. Onge Honeycutt.
- Hosted “An Evening with Lindsay Linton-Buk” in partnership with the NWC Writers Series and Homesteader Museum.
- Recruited and on-boarded four new Alumni Association Board Members.
- Planned and hosted on-campus Alumni Association Board Meeting on May 9th.
- Planned and facilitated meetings for all four Alumni Association Board Committees (Events and Communications met in June; Philanthropy and Volunteer Service met in July).
- Coordinated 6th Annual Trapper Classic Car Show on June 27th.
- Began planning for second annual “Trappers Give Back Day” to be hosted on October 3rd.
- Planning for the quarterly Alumni Association Board meeting on campus on August 29th.
- Began discussions with Del Nose for Alumni Outreach at Trapper Stampede on September 11th.

Publications, Website and Social Media

- Drafted and sent May and July TrapperLink e-newsletters.
- Posted to Instagram and Facebook 29 times during the second quarter of 2026 on nine different topics.

Other

- Attended Wyoming Nonprofit Network Conference in Casper in May.
- Participated in several Park County Travel Council activities such as National Parks Day, regular monthly meetings, and annual grant hearings.
- Participated in Foundation Board committee meetings for Development and Donor Accountability & Stewardship.

President's Report

April - July, 2026

State

Legislature

No legislative meetings were held in April or scheduled in early May concerning topics related to the Community Colleges. An Interim Joint Education Committee meeting is tentatively scheduled for June 1-2 in Casper. No agenda is available currently.

The April CREG (Consensus Revenue Estimating Group) report, a key indicator of Wyoming's financial condition, was released on April 28, 2026. It brought mostly steady news, with current revenue collections directed to the General Fund up 1.4% compared with January projections. The Budget Reserve Account (BRA) is slightly below forecast, at 9.7 million (2.9 percent). The School Foundation Program (SFP) is also just behind pace at -2.5 percent. Actual revenue collections remain mixed. The Iran War, combined with recent volatile oil prices, severance taxes, realized capital gains, and the mild winter for natural gas, leaves the forecast somewhat variable in the remaining months of the fiscal year. Dividends and interest in the permanent mineral fund were 5.8% lower, but capital gains remain more than enough to cover any shortfall. Sales and Use Tax collections are exceeding the forecast by 23.9 million (3.8 percent), and the Common School Account is up 5.7 million (24.2.0 percent).

The Interim Education Committee met June 1-2. The Legislative Service Office and the Commission were asked to present on Dual and Concurrent programs. LSO provided examples of how dual and concurrent programs work in other States such as Washington, Minnesota, and Ohio. Dr. Davis Jenkins from the Community College Research Center presented Purposeful Dual Enrollment as the number of college-going high school graduates continues to decline. Dr. Jenkins stressed that there is an opportunity to expand college and career success through Dual enrollment. Executive Director Laurel Ballard of the Commission then presented on Dual and Concurrent in Wyoming, completion rates, needed student support, Legislative effect, and Funding. A copy of the Commission Memo is included at the end of my report. Several interim committee meetings were also held, including Revenue and Appropriations, but none addressed the Community Colleges or our funding sources.

Wyoming Community College Commission (WCCC)

The WCCC met on April 16 and 17 in Casper. The workshop reviewed the strategic plan's status and suggestions to extend renewal dates; the budget process and the college funding allocation model; the capital construction process; Chapter 5 rule updates; and the 2027-2028 Commission meeting schedule. At the Commission meeting, a new Commissioner, Ruby Calbert, from the Riverton/Lander region, was sworn in, and a new college funding strategic plan subcommittee was formed.

The Wyoming Community College Commission (WCCC) did not meet in May.

The Wyoming Community College Commission (WCCC) met in Sheridan on June 4 and 5. The workshop was held on the afternoon of June 4, with presentations and discussions focused on the

Funding Committee, Adult Education, the Statewide Longitudinal Education Data System, the Supplemental Budget, 2027 Capital Construction, and Commission Rules. The formal Commission meeting was held on Friday, June 5. The consent agenda was approved, and additional work was completed on the regular agenda, including the Supplemental Budget, the Capital Construction prioritization model, project approval, and escalation. Regular and Emergency rules were approved, along with new program requests.

Wyoming Association of Community College Trustees

WACCT met on April 16 in Casper to coincide with the Commission meeting. Trustees discussed the financials to date and the budget kick-off. Advocacy efforts were also discussed and designated as a priority, given the upcoming November election and the pending vote on property tax reductions.

There were no WACCT meetings held in May. Trustees were asked to complete the Executive Director's evaluation.

WACCT met in Sheridan on June 3 and 4 for its annual planning and Board meeting. Planning discussion centered around the upcoming election and legislative session. The Board meeting reviewed the budget and advocacy efforts.

Wyoming Innovation Partnership (WIP)

The WIP PSG group met April 28 to discuss a grant review team. WBA is putting together a process to pull grant opportunities weekly and review for viability to State needs.

There was no President Steering Group meeting held in May. Work continues to finalize funding for administrative support.

The WIP Tourism/Hospitality met on June 8 to provide updates and discuss future opportunities to work together. The UW Worth Center proposed collaborating on a FIPSE grant together entitled, Wyoming Rural Pathways Initiative. With UW serving as the lead institution and my encouragement for the CCs to participate, Northwest College and Sheridan College have signed up. The Grant was submitted on June 20.

In June WBA announced that the Ellbogen Foundation has awarded \$500,000 to WIP for administrative support. A planning group has also been gathered to review and submit a NSF TechAccess grant and NSF – ECORE and a EDA AI upskill grant around AI programs.

Campus

Forensics – The Forensics team attended the Phi Rho Pi National Forensics Tournament. Phi Rho Pi is the national tournament for community and two-year colleges. This year, over 50 different schools competed in Bethesda, MD, from Monday, April 6, until Saturday, April 11. Five students competed in this tournament: Stetson Asay, Aspen Atkinson, Katie Badget, Isabella Gomez, and Seid Orazgulyyev. With 132 students competing, Isabella won bronze for IPDA debate. Seid won the Warren-Dahlin Student Fellowship Award for his hard work, dedication, and work with others in the Forensic community. The Phi Rho Pi organization recognized Dr. Robert Becker for his years of hard work and service. Starting next year, the Robert Becker award will be awarded to a judge at Phi Rho Pi.

Commencement was held on Saturday, May 9, 2026. Over 200 students graduated with certificates, Associate's degrees, or Bachelor of Applied Science degrees. Earlier celebrations on Friday for Nursing Pinning and the International Student graduation BBQ rounded out multiple events and activities that wrapped up the spring semester.

The Student Awards reception was held on Thursday, April 23, 2026. Outstanding students were recognized in each of the five academic divisions. Honoring these students and learning more about their achievements is a testament to their efforts and the work of the faculty and supporting staff.

The Juried Art Show was held on Thursday, April 23, 2026, in the Cabre gallery. Trustee awards were given to selected student artists, and overall, the show was exceptional.

I attended the American Association of Community Colleges conference on April 10-14. The plenary session focused on introducing the new CEO (Dr. DeRionne Pollard) and reviewing and seeking feedback on the new [Strategic Compass 2035](#) document. While there, I attend several sessions on federal regulations, dual and concurrent growth, AI, and CEO leadership/input. There was definitely a new energy to the conference and a desire for AACC to advocate for higher education and the critical role of community colleges.

The summer session started on June 1, 2026, and is progressing well. The Yellowstone Music Camp was held from June 14 to June 19, with over 100 campers in attendance. The campus was busy with activities and students everywhere.

Summertime College facility projects continue across campus. The campus is also busy hosting small events, business meetings, and visits from prospective students. Dining has been open Monday through Thursday, with decent utilization in addition to camps and event catering. Having the student center open for everyone to enjoy enhances the college's energy and service offerings.

Strategic plan 2030

(Pillar 1.1.2) *Collaborate with K12, State, & Businesses on program needs.* The Presidents continue to meet with WIP Director Schoenfeld as part of the Presidents' Steering Group to discuss Statewide programmatic and industry sector needs. The Wyoming Business Alliance is working hard to transition WIP and work with the PSG, businesses, K-12, and government to define the next phase of statewide collaboration. The PSG will meet on June 30 to discuss a report just completed by Deloitte entitled: Wyoming AI Workforce Development Strategy and Roadmap. Workforce Services will provide updates on the Digital Wallet project, and Lauren and the Commission will discuss Grant coordination and potential opportunities.

(Pillar 1.5.1) *Innovate academic programming.* Hanover completed a study focused on the Visual and Performing Arts program offerings. Discussions began regarding the business programming study and the renewal of employment-needs data. Hanover is gearing up to work on a labor market study comparing needs with our academic program offerings and a Landscape Scan of AI Integration in Programming.

(Pillar 1.1.4.) *Implement and operate campus grants.* Northwest College continues to work on writing and/or the recent submission of several grants. The Metallica Scholars Initiative grant was completed and submitted on Monday, April 27, 2026, and focuses on career and technical programming. Thanks go out to Ellucian, Christi Greaham, Ty Flock, Dave Erickson, and the entire grant team.

In May, the College submitted and was re-awarded the Title III waiver, making us eligible to apply for more grant opportunities. The GLT is focused on the Title III Strengthening Institutions grant that was worked on earlier and then never opened. Some modifications are needed due to revised grant guidelines and priorities. A Home Depot Retool grant was submitted on June 2, seeking 200K for Simpson Hall improvements.

In June, the Grant Leadership Team celebrated the submission of the Title III Strengthening Institutions grant after much effort and collaboration. We also completed a sub-awardee submittal for a FIPSE

grant with the University of Wyoming on OE/Tourism and finalized our submittal for the INBRE grant with UW. Several other discussions are ongoing with departments relating to grant requests and ideas.

(Pillar 2.1.1) Develop a robust marketing plan around college branding and strategic enrollment.

April - President Watson, in coordination with VP Havron, continued to meetings with consultant Ms. Pam Cox-Otto, around current marketing efforts and strategic focus. Our current focus is on fall 2026 enrollment and the development of the new MORE campaign.

May - Current focus continues around fall 2026 enrollment and the MORE campaign. The Commencement Program was modified to include congratulatory remarks and a QR code to a landing page for the BAS degree and Bridge Grant. A letter from the President was created and sent to all recent graduates, thanking them for coming and reminding them we have MORE to offer with affordable BAS programs. An alumni cling was also sent with diplomas.

June - Admissions and marketing have been working on messaging within Element 451 around NWC having MORE to offer with programs, affordability, and the BAS programs. The President's postcard has been designed and will be sent out in July with updates, a call for feedback, the Bridge Grant, and MORE offerings.

(Pillar 2.2) Elevate Strategic Enrollment efforts.

April/May - President Watson, in coordination with VP Havron, continues our meetings with consultant Ms. Pam Cox-Otto, around our current marketing efforts and strategic focus. Our current focus is on fall 2026 enrollment and the MORE Campaign. Kendle has been meeting with Communications and Marketing to develop scripts for E451 enrollment pathways.

June – With VP Havron’s resignation, President Watson, is overseeing the supervision of enrollment in coordination with Director Hernandez. Coordinator Kendle Jeffs, continues our focus on enrollment and integrating the MORE campaign into messaging. Eight groups have been identified and reclassified into four focus groups for outreach and recruitment. Kendle continues to meet with Marketing to develop scripts for E451 enrollment pathways.

(Pillar 4.1.3) Revitalize Campus – ORB Renewal Project.

April/May - The Orendorff building project remains on pace for late-summer completion. Resurfacing of the CMU walls will be complete in May. Internal electrical upgrades are nearly complete, and the new heating and cooling ductwork has been installed and pressure-tested. Domestic water piping has been installed and pressure-checked along with all fire sprinkler lines. Heating lines and variable air vents have been installed and tested. Wiring for data and the phone system has been pulled and installed. The new fiber from Moyer to ORB is installed and will be activated in May.

June - Internal electrical upgrades continue and the current focus is on the build-out of the bathrooms, general carpentry, ceiling grid installation, and mechanical work. The ceiling grid, lighting and leveling work on the floors continue across the building. Carpet in in the beginning stage of installation.

(Pillar 4.1.5) Revitalize Campus – Trapper Village West Improvements and Other. In-house minor repairs and mid-range renovations continue for all active units as they become available and staffing allows. Painting has been done in the Photography labs, the Student Center, and the Soccer Fieldhouse. Additional painting refresh work is scheduled for Simpson Hall. Damaged furniture has been sorted and removed and some furnishings will be replaced in the Simpson Hall entryway and the Intercultural House before school starts.

Local engagement

Powell Economic Partnership

I attended the PEP annual meeting on April 9, 2026. The meeting was well attended, and I was able to speak with several community members. I did not attend the monthly meeting on April 16, 2026, due to the Commission meeting in Casper. I did not receive a copy of the agenda for the meeting.

I attended the PEP meeting on May 21, 2026. The financials were reviewed, along with a discussion of new board members, grant work, and policies regarding computer and internet security. PEP will also participate in WYO Gives this summer, and the Board members agreed to put in match funds personally.

I attended the PEP meeting on June 18, 2026. The consent agenda and financials were reviewed, along with a discussion on the new website, the fair booth, candidate forum, and acting as a fiscal sponsor for the Powell Golf Club for a Moyer Foundation grant. As PEP will participate in WYO Gives this summer, the Board recorded a video thanking future donors for their support.

Forward Cody

I attended the Forward Cody meeting on April 8, 2026. The meeting included a regular review of financial statements, an update on property holdings and membership, the CEO's report, and updates on various projects.

I attended the Forward Cody meeting on May 26, 2026. Chair Newsome led updates on its finances, marketing efforts, and received a CEO update from Jake Hogan. Discussion also centered around properties. It was noted that the shooting complex groundbreaking event was a huge success, with many people in attendance.

I attended the Forward Cody meeting on June 23, 2026. The Board reviewed the minutes and financials, marketing and membership activity, and received a CEO update from Jake Hogan.

Foundation and Alumni

Foundation and Alumni

I attended the Foundation meeting on April 30, 2026. The Foundation reviewed the consent agenda items and committee work and received the development report. After the Foundation meeting, a joint Board Reception was held with the College Trustees and Foundation Board members.

There were no Board meetings in May.

The Foundation hosted the Sixth Annual Trapper Classic Car Show. It was a fun day with a good turnout, even if the weather cut the show short at the end due to a little rain. There were new or returning cars, good conversation, and lunch available at the student center, which was well attended.

Respectfully submitted,



Lisa M. Watson
President



Fall Events 2026

August 24th 3:00 p.m.	Ice Cream with Dinosaurs In Front of Math and Science
August 26th	NWC Classes Begin
August 28th 4:00 p.m.	Paint The Town Red Bent Street
August 29th 9:00 a.m.	Run for Berry NWC Campus Mall
September 25th 6:00 p.m.	Women's Volleyball Vs. Gillette Community College Cabre Gym
September 26th 2:00 p.m.	Women's Volleyball Vs. Casper College Cabre Gym
October 10th 6:30 p.m. to 8:30 p.m.	NCO Small Groups Concert Student Center
October 23rd 6:00 p.m.	Women's Volleyball Vs. Eastern Wyoming College Cabre Gym
October 24th 2:00p.m	Women's Volleyball Vs. LCCC Cabre Gym

NWC Foundation
Statement of Financial Position
As of June 30, 2026

	General Fund	Endowed Fund	Gift Annuity Fund	TOTAL	Youth Clubs of Park County
ASSETS					
Cash in Bank	402,536.93	5,352,716.47	9,287.34	5,764,540.74	-
Undeposited Funds	2,775.05	-	-	2,775.05	-
Petty Cash	250.00	-	-	250.00	-
Investments - Cash	2,857.99	771,602.99	695.05	775,156.03	13,413.98
Investments - Securities	397,256.28	59,998,892.02	54,046.13	60,450,194.43	1,043,054.30
Due To/From	(301,570.89)	218,924.80	(4,758.38)	(87,404.47)	87,404.47
Receivables	-	234,674.00	-	234,674.00	-
Real Estate Holdings	384,148.82	882,900.00	-	1,267,048.82	-
Accumulated Depreciation	(41,924.26)	(25,690.91)	-	(67,615.17)	-
Trusts	-	634,027.47	-	634,027.47	-
Other Assets	126,759.95	-	-	126,759.95	-
TOTAL ASSETS	<u>\$973,089.87</u>	<u>\$68,068,046.84</u>	<u>\$59,270.14</u>	<u>\$69,100,406.85</u>	<u>\$1,143,872.75</u>
LIABILITIES					
Payables	50,583.81	23,912.22	-	74,496.03	-
Accrued Liabilities	-	-	-	-	-
Assets Held in Trust	-	38,281.67	-	38,281.67	1,000,000.00
Investing Activity	-	-	-	-	143,872.75
NWC Assets	193,192.12	24,833,468.36	-	25,026,660.48	-
Charitable Gift Annuity Liability	-	-	17,393.71	17,393.71	-
Other Liabilities	2,600.00	-	-	2,600.00	-
TOTAL LIABILITIES	<u>\$246,375.93</u>	<u>\$24,895,662.25</u>	<u>\$17,393.71</u>	<u>\$25,159,431.89</u>	<u>\$1,143,872.75</u>
NET ASSETS					
Permanently Restricted	-	26,834,278.60	-	26,834,278.60	-
Temporarily Restricted	68,473.86	16,338,105.99	41,796.92	16,448,376.77	-
Unrestricted	658,240.08	-	79.51	658,319.59	-
TOTAL NET ASSETS	<u>726,713.94</u>	<u>43,172,384.59</u>	<u>41,876.43</u>	<u>43,940,974.96</u>	<u>-</u>
LIABILITIES AND NET ASSETS	<u>\$973,089.87</u>	<u>\$68,068,046.84</u>	<u>\$59,270.14</u>	<u>\$69,100,406.85</u>	<u>\$1,143,872.75</u>

NWC Foundation
Statement of Activities
From 7/1/2025 Through 6/30/2026

Unrestricted

	<u>General Fund</u>	<u>Endowed Fund</u>	<u>Gift Annuity Fund</u>	<u>TOTALS</u>
REVENUE				
Contributions	22,758.56	-	-	22,758.56
Investment Income	10,773.62	-	-	10,773.62
Realized Gains (Losses) on Sales of Investments	56,997.64	-	-	56,997.64
Unrealized Gains (Loss) on Investments	9,799.62	-	-	9,799.62
Foundation Endowment Management Fee	674,155.00	-	-	674,155.00
Foundation General Fund Payout	58,899.00	-	-	58,899.00
Rental Property Income	15,500.00	-	-	15,500.00
Nelson House Income	4,300.00	-	-	4,300.00
Wolfe Property Income	1,500.00	-	-	1,500.00
Farm Lease Income	9,500.00	-	-	9,500.00
Miscellaneous Income	834.33	-	-	834.33
Cultivation Event Income	8,060.00	-	-	8,060.00
Alumni Event Income	3,370.00	-	-	3,370.00
Contributions - In Kind from NWC	30,232.52	-	-	30,232.52
Transfer of Current Year Activity	500.00	-	-	500.00
TOTAL REVENUE	<u>\$ 907,180.29</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 907,180.29</u>
EXPENSES				
Salaries/Benefits Paid by Foundation	460,474.57	-	-	460,474.57
Salaries/Benefits Paid by NWC	25,857.52	-	-	25,857.52
Annual Giving Activities	6,809.60	-	-	6,809.60
Alumni Association Activities	9,589.63	-	-	9,589.63
Staff Development/Education	2,087.40	-	-	2,087.40
Foundation Events	13,471.76	-	-	13,471.76
Relationship Development	3,098.26	-	-	3,098.26
Planned Giving	9,775.11	-	-	9,775.11
Fundraising Technology Software	43,496.56	-	-	43,496.56
Financial Management Software	12,218.95	-	-	12,218.95
Marketing/Advertising	6,110.00	-	-	6,110.00
Communications (publications, email news)	14,090.01	-	-	14,090.01
Graphic Design	7,470.00	-	-	7,470.00
Office Supplies/Expenses	1,632.56	-	-	1,632.56
Vehicle Expense	6,000.00	-	-	6,000.00
Accounting Expense	26,860.79	-	-	26,860.79
Legal Expense	91.00	-	-	91.00
Other Professional Expense	7,315.00	-	-	7,315.00
Board and Committee Expense	800.54	-	-	800.54
Community Memberships/Activities	735.00	-	-	735.00
Investment Fees	2,357.46	-	-	2,357.46
Credit Card Fees	6,709.63	-	-	6,709.63
Nelson House Expense	7,226.24	-	-	7,226.24
Rental Property Expense	9,811.76	-	-	9,811.76
Wolfe Property Expense	3,858.00	-	-	3,858.00
Real Property Expense	9,197.45	-	-	9,197.45
Farm Lease Expense	7,100.00	-	-	7,100.00
Giving Day Departmental Challenge	5,000.00	-	-	5,000.00
Depreciation Expense	9,990.77	-	-	9,990.77
NWC Presidents Discretionary Fund	899.60	-	-	899.60
NWC Hospitality & Public Relations	1,737.95	-	-	1,737.95
WACCT Dues	23,500.00	-	-	23,500.00
Academic Impressions	1,000.00	-	-	1,000.00
NWC Foundation Grants	4,524.91	-	-	4,524.91
Occupancy Expense	4,375.00	-	-	4,375.00

NWC Foundation
Statement of Activities
From 7/1/2025 Through 6/30/2026

Unrestricted

	<u>General Fund</u>	<u>Endowed Fund</u>	<u>Gift Annuity Fund</u>	<u>TOTALS</u>
EXPENSES Cont.				
Program Support	2,000.00	-	-	2,000.00
Transfer of Current Year Activity	500.00	-	-	500.00
General Funds for Underwater Gift Annuity Accounts	640.00	-	-	640.00
TOTAL EXPENSES	<u>\$ 758,413.03</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 758,413.03</u>
NET ASSETS, BEGINNING OF YEAR	509,472.82	-	79.51	509,552.33
INCREASE (DECREASE) IN NET ASSETS	<u>148,767.26</u>	<u>-</u>	<u>-</u>	<u>148,767.26</u>
NET ASSETS, ENDING	<u><u>\$ 658,240.08</u></u>	<u><u>\$ -</u></u>	<u><u>\$ 79.51</u></u>	<u><u>\$ 658,319.59</u></u>

NWC Foundation
Statement of Activities
From 7/1/2025 Through 6/30/2026

Temporarily Restricted

	General Fund	Endowed Fund	Gift Annuity Fund	TOTALS
REVENUE				
Contributions	440,924.40	69,890.78	-	510,815.18
Outstanding Pledges	(12,428.58)	(176,025.92)	-	(188,454.50)
Giving Day Departmental Challenge	3,475.00	-	-	3,475.00
Miscellaneous Income	17,159.00	-	-	17,159.00
Investment Income	-	1,472,343.47	1,443.79	1,473,787.26
Realized Gains (Losses) on Sales of Investments	-	10,627,291.43	10,561.12	10,637,852.55
Unrealized Gains (Loss) on Investments	-	(3,032,341.20)	(3,077.85)	(3,035,419.05)
Change in Value - Beneficial Interest in Perpetual Trust	-	45,616.37	-	45,616.37
Cultivation Events Income	3,690.00	-	-	3,690.00
General Funds to Underwater Gift Annuity Accounts	-	-	640.00	640.00
Transfer of Current Year Activity	28,903.10	16,718.00	-	45,621.10
TOTAL REVENUE	\$ 481,722.92	\$ 9,023,492.93	\$ 9,567.06	\$ 9,514,782.91
EXPENSES				
Investment Fees	-	294,909.60	310.18	295,219.78
Depreciation Expense	-	5,709.09	-	5,709.09
Cultivation Events Expense	387.00	-	-	387.00
Scholarships	116,551.50	1,521,935.90	-	1,638,487.40
Program Support	210,006.77	293,595.52	-	503,602.29
Booster Club Expense	14,821.98	2,880.00	-	17,701.98
Directed Funds to NWC	37,510.00	-	-	37,510.00
Change In Liability Associated with NWC State Funds	-	1,336,677.33	-	1,336,677.33
Change in Liability Associated with Funds Held for PCYC	-	6,285.43	-	6,285.43
Refund of Unused Receipts	700.00	-	-	700.00
Change In Liability Associated with Gift Annuities	-	-	(1,062.67)	(1,062.67)
Gift Annuity Monthly Expense	-	-	2,719.00	2,719.00
Foundation Management Fee	-	732,376.00	678.00	733,054.00
Transfer of Current Year Activity	279,818.43	26,577.10	-	306,395.53
TOTAL EXPENSES	\$ 659,795.68	\$ 4,220,945.97	\$ 2,644.51	\$ 4,883,386.16
NET ASSETS, BEGINNING OF YEAR	246,546.62	11,535,559.03	34,874.37	11,816,980.02
INCREASE (DECREASE) IN NET ASSETS	(178,072.76)	4,802,546.96	6,922.55	4,631,396.75
NET ASSETS, ENDING	\$ 68,473.86	\$ 16,338,105.99	\$ 41,796.92	\$ 16,448,376.77

NWC Foundation
Statement of Activities
From 7/1/2025 Through 6/30/2026

Permanently Restricted

	<u>General Fund</u>	<u>Endowed Fund</u>	<u>Gift Annuity Fund</u>	<u>TOTALS</u>
REVENUE				
Contributions	-	965,272.86	-	965,272.86
Miscellaneous Income	-	1,525.00	-	1,525.00
Transfer of Current Year Activity	-	263,314.43	-	263,314.43
TOTAL REVENUE	<u>\$ -</u>	<u>\$ 1,230,112.29</u>	<u>\$ -</u>	<u>\$ 1,230,112.29</u>
EXPENSES				
Transfer of Current Year Activity	-	2,950.00	-	2,950.00
TOTAL EXPENSES	<u>\$ -</u>	<u>\$ 2,950.00</u>	<u>\$ -</u>	<u>\$ 2,950.00</u>
NET ASSETS, BEGINNING OF YEAR	-	25,607,116.31	-	25,607,116.31
INCREASE (DECREASE) IN NET ASSETS	<u>-</u>	<u>1,227,162.29</u>	<u>-</u>	<u>1,227,162.29</u>
NET ASSETS, ENDING	<u><u>\$ -</u></u>	<u><u>\$ 26,834,278.60</u></u>	<u><u>\$ -</u></u>	<u><u>\$ 26,834,278.60</u></u>

NWC Foundation General Fund

Unrestricted General Cash Balance Report June 30, 2026

	<u>2022</u>	<u>2023</u>	<u>Short Year</u> <u>FY 2024</u>	<u>FY 2025</u>	<u>FY2026</u>
Expendable:					
Cash in bank	\$ (2,595,497.38)	\$ (2,594,070.03)	\$ 171,232.45	\$ 341,467.58	\$ 402,536.93
Undeposited Funds	\$ -	\$ (425,924.83)	\$ -	\$ 6,315.53	\$ -
Petty Cash	\$ -	\$ -	\$ -	\$ 250.00	\$ 250.00
Cash investments	\$ 701,071.84	\$ 739,533.69	\$ 1,834.77	\$ 4,989.96	\$ 2,857.99
AR/AP and Due To/From	\$ 1,210,454.76	\$ (988,786.02)	\$ (400,623.71)	\$ (678,171.61)	\$ (383,801.81)
Investments	\$ 568,467.41	\$ 3,318,272.07	\$ 138,027.37	\$ 430,448.78	\$ 222,234.16
Net "Liquid" Assets	\$ (115,503.37)	\$ 49,024.88	\$ (89,529.12)	\$ 105,300.24	\$ 244,077.27
(Does not include land, or other property)					

Operating Cash Activity June 30, 2026

	<u>2022</u>	<u>2023</u>	<u>Short Year</u> <u>FY 2024</u>	<u>FY 2025</u>	<u>FY 2026</u>
Receipts					
Contributions	\$ 12,455.20	\$ 11,369.32	\$ 8,068.75	\$ 24,986.05	\$ 22,758.56
Investment income	\$ 11,768.03	\$ 10,627.94	\$ 18,724.40	\$ 12,631.60	\$ 10,773.62
Management fees	\$ 487,385.00	\$ 496,415.00	\$ -	\$ 620,618.00	\$ 674,155.00
Endowment earnings	\$ 48,799.00	\$ 48,928.00	\$ 49,764.00	\$ 53,077.00	\$ 58,899.00
Miscellaneous	\$ 36,280.97	\$ 59,067.11	\$ 22,829.50	\$ 28,509.59	\$ 43,564.33
Subtotal	\$ 596,688.20	\$ 626,407.37	\$ 99,386.65	\$ 739,822.24	\$ 810,150.51
Realized and Unrealized Gain or Loss	\$ (2,047,597.97)	\$ 105,252.15	\$ 39,455.65	\$ 42,234.64	\$ 66,797.26
Land sale	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL	\$ (1,450,909.77)	\$ 731,659.52	\$ 138,842.30	\$ 782,056.88	\$ 876,947.77
Disbursements					
Salaries/benefits	\$ 310,638.94	\$ 323,827.58	\$ 171,711.50	\$ 349,116.62	\$ 460,474.57
FR/operations costs	\$ 170,926.68	\$ 164,564.00	\$ 86,399.38	\$ 173,684.61	\$ 204,233.17
Grants to NWC	\$ 527,171.78	\$ 18,949.01	\$ (594.72)	\$ 4,729.37	\$ 10,162.46
WACCT Dues	\$ 20,500.00	\$ 20,500.00	\$ -	\$ 20,500.00	\$ 23,500.00
Nelson/Nott House/Real Property	\$ 100,012.75	\$ 19,275.90	\$ 7,046.56	\$ 28,247.09	\$ 30,093.45
Investment/bank/CGA fees	\$ 10,257.51	\$ 9,528.59	\$ 12,833.58	\$ 10,949.83	\$ 9,707.09
Subtotal	\$ 1,139,507.66	\$ 556,645.08	\$ 277,396.30	\$ 587,227.52	\$ 738,170.74
Gravyty & Financial Edge Conversion	\$ 48,736.00	\$ -	\$ -	\$ -	\$ -
Consulting/Vibrancy Campaign	\$ 782.81	\$ 10,486.19	\$ -	\$ -	\$ -
TOTAL	\$ 1,189,026.47	\$ 567,131.27	\$ 277,396.30	\$ 587,227.52	\$ 738,170.74
Operating Margin	\$ (542,819.46)	\$ 69,762.29	\$ (178,009.65)	\$ 152,594.72	\$ 71,979.77
Increase/(Decrease) in Unrestricted Assets	\$ (2,639,936.24)	\$ 164,528.25	\$ (138,554.00)	\$ 194,829.36	\$ 138,777.03



NORTHWEST COLLEGE FOUNDATION

Proposed Fiscal Year 2027 Budget

<u>Operating Expenses</u>	<u>Proposed FY 2027 Budget</u>	<u>Fiscal Year 2026 Actual</u>	<u>Fiscal Year 2026 Budget</u>	<u>Fiscal Year 2026 Remaining</u>
Executive Director Salary	\$ 155,200.00	\$ 150,541.06	\$ 149,400.00	\$ (1,141.06)
Executive Director Benefits	\$ 35,200.00	\$ 33,039.52	\$ 33,600.00	\$ 560.48
Development Manager Salary	\$ 73,100.00	\$ 69,738.54	\$ 69,800.00	\$ 61.46
Development Manager Benefits	\$ 17,500.00	\$ 15,933.01	\$ 16,500.00	\$ 566.99
Development Coordinator Salary	\$ 55,500.00	\$ 52,081.06	\$ 52,200.00	\$ 118.94
Development Coordinator Benefits	\$ 13,500.00	\$ 11,683.95	\$ 12,300.00	\$ 616.05
Foundation Accountant Salary	\$ 67,000.00	\$ 63,595.06	\$ 63,600.00	\$ 4.94
Foundation Accountant Benefits	\$ 16,000.00	\$ 14,801.54	\$ 15,000.00	\$ 198.46
Foundation Technician Salary	\$ 43,100.00	\$ 39,833.13	\$ 39,800.00	\$ (33.13)
Foundation Technician Benefits	\$ 10,500.00	\$ 9,227.70	\$ 9,500.00	\$ 272.30
Personnel Expenses	\$ 486,600.00	\$ 460,474.57	\$ 461,700.00	\$ 1,225.43
Alumni Association Activities (net of fees)	\$ 10,000.00	\$ 6,219.63	\$ 10,000.00	\$ 3,780.37
Annual Giving Activities	\$ 8,000.00	\$ 6,809.60	\$ 10,000.00	\$ 3,190.40
Relationship Development	\$ 5,000.00	\$ 3,098.26	\$ 5,000.00	\$ 1,901.74
Staff Development/Education	\$ 5,000.00	\$ 2,087.40	\$ 5,000.00	\$ 2,912.60
Foundation Events (net of fees)	\$ 6,000.00	\$ 5,411.76	\$ 5,000.00	\$ (411.76)
Planned Giving (brochures, postcard, website)	\$ 11,000.00	\$ 9,775.11	\$ 13,000.00	\$ 3,224.89
Community Memberships, Activities	\$ 1,000.00	\$ 735.00	\$ 1,000.00	\$ 265.00
Fundraising Technology Software	\$ 48,000.00	\$ 43,496.56	\$ 40,000.00	\$ (3,496.56)
Financial Management Software	\$ 13,250.00	\$ 12,218.95	\$ 12,250.00	\$ 31.05
Advertising	\$ 7,000.00	\$ 6,110.00	\$ 7,000.00	\$ 890.00
Communications (publications & printing)	\$ 18,000.00	\$ 14,090.01	\$ 20,000.00	\$ 5,909.99
Graphic Design	\$ 10,000.00	\$ 7,470.00	\$ 16,000.00	\$ 8,530.00
Legal Expense	\$ 2,000.00	\$ 91.00	\$ 2,000.00	\$ 1,909.00
Other Professional Expenses	\$ 7,000.00	\$ 7,315.00	\$ 6,400.00	\$ (915.00)
Board and Committee Expense	\$ 1,000.00	\$ 800.54	\$ 1,000.00	\$ 199.46
Office Supplies/Expense	\$ 4,000.00	\$ 1,632.56	\$ 3,000.00	\$ 1,367.44
Vehicle Expense	\$ 6,000.00	\$ 6,000.00	\$ 6,000.00	\$ -
Accounting Expense	\$ 28,850.00	\$ 26,860.79	\$ 26,800.00	\$ (60.79)
Operations	\$ 191,100.00	\$ 160,222.17	\$ 189,450.00	\$ 29,227.83
TOTALS	\$ 677,700.00	\$ 620,696.74	\$ 651,150.00	\$ 30,453.26
<u>Grant/Project Expense</u>	<u>Fiscal Year 2026 Actual</u>	<u>Fiscal Year 2026 Actual</u>	<u>Fiscal Year 2026 Budget</u>	<u>Fiscal Year 2026 Remaining</u>
NWC President's Discretionary Fund	\$ 3,000.00	\$ 899.60	\$ 3,000.00	\$ 2,100.40
NWC Hospitality and Public Relations Fund	\$ 5,000.00	\$ 1,737.95	\$ 5,000.00	\$ 3,262.05
NWC Grants	\$ -	\$ 4,524.91	\$ -	\$ (4,524.91)
Giving Day Department Challenge	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00	\$ -
Academic Impressions Membership/Training	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ -
Nelson House Expense	\$ 10,000.00	\$ 7,226.24	\$ 10,000.00	\$ 2,773.76
Rental Property Expense	\$ 10,000.00	\$ 9,811.76	\$ 10,500.00	\$ 688.24
Real Property Expenses	\$ 8,000.00	\$ 9,197.45	\$ 7,500.00	\$ (1,697.45)
Wolfe Property Expenses	\$ 1,500.00	\$ 3,858.00	\$ 1,500.00	\$ (2,358.00)
WACCT Annual Dues	\$ 23,500.00	\$ 23,500.00	\$ 23,500.00	\$ -
TOTALS	\$ 67,000.00	\$ 66,755.91	\$ 67,000.00	\$ 244.09
GRAND TOTALS	\$ 744,700.00	\$ 687,452.65	\$ 718,150.00	\$ 30,697.35



Annual Foundation Support to NWC (Cash Basis)

	Short Year						
	<u>2020</u>	<u>2021</u>	<u>2022</u>	<u>2023</u>	<u>FY2024</u>	<u>FY2025</u>	<u>FY2026</u>
Scholarships	\$ 1,243,711	\$ 1,285,396	\$ 1,658,835	\$ 1,708,570	\$ 802,632	\$ 1,586,292	\$ 1,638,487
Scholarships and CTD Grants- Park County Relief Fund	\$ 34,857	\$ 244,816	\$ 5,184	\$ -	\$ -	\$ -	\$ -
Program Support (from endowments)	\$ 54,883	\$ 62,108	\$ 86,027	\$ 105,976	\$ 46,259	\$ 62,775	\$ 113,418
Program Support (annual gifts)	\$ 44,103	\$ 30,906	\$ 26,589	\$ 63,068	\$ 35,983	\$ 56,396	\$ 72,013
Athletics (non-scholarship support)	\$ 7,921	\$ 20,183	\$ 23,938	\$ 9,154	\$ 8,562	\$ 36,684	\$ 17,702
Price Economic Development Grants	\$ 14,327	\$ 28,266	\$ 36,044	\$ 47,034	\$ 2,570	\$ 14,157	\$ -
Paul Stock (student employment/support)	\$ 22,999	\$ 41,999	\$ 44,999	\$ 34,995	\$ 35,000	\$ 40,000	\$ 40,000
Endowed Chair - Salaries/Staff Dev/Student Experience	\$ -	\$ -	\$ -	\$ 3,289	\$ 108,090	\$ 108,858	\$ 117,231
Instructional Technology Grants	\$ 21,191	\$ 82,864	\$ 22,777	\$ 45,542	\$ 52,581	\$ 8,410	\$ 22,946
Foundation General Grants	\$ 8,157	\$ 18,464	\$ 19,430	\$ 646	\$ -	\$ 2,510	\$ 4,525
Student Center/Temp Dining Facility Grant	\$ -	\$ -	\$ 500,000	\$ -	\$ 3,335,478	\$ 166,871	\$ 177,503
Residence Hall Renovations	\$ -	\$ -	\$ -	\$ 18,093	\$ -	\$ 154,226	\$ -
Farm Lease Income (for animal feed)	\$ 1,200	\$ -	\$ 2,400	\$ -	\$ 1,200	\$ -	\$ -
Academic Impressions Training	\$ 2,000	\$ -	\$ 1,000	\$ 1,000	\$ -	\$ 1,000	\$ 1,000
WY Assoc. of Community College Trustees Dues	\$ -	\$ 20,500	\$ 20,500	\$ 20,500	\$ -	\$ 20,500	\$ 23,500
NWC Presidents Discretionary Fund (\$3,000)	\$ 61	\$ 1,120	\$ 216	\$ 133	\$ -	\$ 477	\$ 900
NWC Hospitality & Public Relations (\$5,000)	\$ 394	\$ 2,569	\$ 2,971	\$ 2,170	\$ 783	\$ 1,742	\$ 1,738
NWC Foundation Staff Salaries/Benefits	\$ 246,373	\$ 264,997	\$ 310,639	\$ 323,828	\$ 171,712	\$ 343,117	\$ 460,475
	\$ 1,702,179	\$ 2,104,187	\$ 2,761,550	\$ 2,383,998	\$ 4,600,850	\$ 2,604,014	\$ 2,691,439
Percent of total Foundation payroll paid for by the Foundation	54.32%	61.55%	66.69%	67.67%	67.24%	66.96%	94.68%
College Portion of Foundation Staff Salaries/Benefits	207,225	165,575	155,170	154,678	83,666	169,302	25,858
Total	453,599	430,571	465,809	478,506	255,377	512,419	486,332

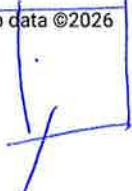
NWC Support Detail
April 1 - June 30, 2026

Account Description	Journal reference	Amount	Project Description
NWC Foundation Grants	Writers Series - Advertisement, Refreshments and Author Fee	\$1,641.03	Cody Writers Series
	NWC Foundation Grants Total	\$1,641.03	
Scholarships	Spring 2026 Scholarship Awards	\$818,505.36	Various
	Scholarships Total	\$818,505.36	
Program Support Funds	2026 Student Academic Showcase- Morning Snacks	\$117.91	
Program Support Funds	2026 Student Academic Showcase- Lunch	\$1,635.34	
Program Support Funds	2026 Student Academic Showcase- Afternoon Snacks	\$246.75	
Program Support Funds	Event Supplies	\$1,131.47	Art and Elsa Reichert International Student Program Endowment
Program Support Funds	Phi Rho Pi Tournament Fees and Travel	\$12,305.73	Boydston Family Forensics Fund
Program Support Funds	Computing and Technology Budget Supplement	\$2,500.00	Computer Science/Technology Endowed Funds
Program Support Funds	Ag Department Drone Purchase-Giving Day Donations	\$3,063.94	Giving Day: Ag
Program Support Funds	Visiting Artist Workshop, Hospitality and Materials	\$465.02	Giving Day: Art and Design
Program Support Funds	Wrap reality Hand Gun, Kit Glock-Giving Day Purchases	\$1,200.00	Giving Day: Criminal Justice
Program Support Funds	DJI Mini Drones-Giving Day Donations	\$1,000.00	Giving Day: Education
Program Support Funds	Bleeding Intervention Trainer-Giving Day Purchases	\$1,372.94	Giving Day: EMS
Program Support Funds	EMS Embroidered Patches-Giving Day Donations	\$275.06	Giving Day: EMS
Program Support Funds	WSCA and Phi Rho Pi Tournament Travel and Fees	\$5,600.00	Giving Day: Forensics
Program Support Funds	Chester Chest with Port Access-Giving Day Purchases	\$1,028.63	Giving Day: Nursing and Allied Health
Program Support Funds	Graduation Application Fees-Giving Day Purchases	\$41.04	Giving Day: TRIO
Program Support Funds	Chester Chest with Port Access	\$4,114.52	Instructional Technology Endowment
Program Support Funds	Music AAC equipment	\$4,449.00	Instructional Technology Endowment
Program Support Funds	Dell Pro 16 Laptop-AAC Equipment	\$1,699.00	Instructional Technology Endowment
Program Support Funds	3D Printer-AAC Equipment	\$3,064.31	Instructional Technology Endowment
Program Support Funds	Vernier Go Direct Mini GC-AAC Equipment	\$9,619.61	Instructional Technology Endowment
Program Support Funds	Event Supplies	\$486.92	Intercultural Center/BOCES Programming Endowment
Program Support Funds	Fullbright Scholar Stipend and Taxes	\$3,448.80	Intercultural Center/BOCES Programming Endowment
Program Support Funds	Lunch Meeting with Athletics	\$131.79	Intercultural Center/BOCES Programming Endowment
Program Support Funds	Livestock Judging T Shirts	\$705.00	Livestock Judging Camp
Program Support Funds	Library Expenses	\$8,679.48	Mary Shoemaker Nelson Memorial Endowment
Program Support Funds	Computing and Technology Budget Supplement	\$10,000.00	Mary Shoemaker Nelson Memorial Endowment
Program Support Funds	Board Development	\$2,750.00	Maurice and Lillian Knutson Board Development Endowment
Program Support Funds	Music Technology Workshop	\$234.53	Music Technology Endowment
Program Support Funds	Artist Workshop	\$300.00	Music Technology Endowment
Program Support Funds	Summer Student Employment, Music camp, and Tutoring	\$40,000.00	Paul Stock Foundation Endowment
Program Support Funds	Computing and Technology Budget Supplement	\$2,000.00	Science and Technology Fund Endowment
Program Support Funds	Stethoscopes for Students	\$830.64	Stethoscopes for Students Project
Program Support Funds	Student Center Payment for FY26	\$177,303.30	Student Center Non-Endowed Fund
Program Support Funds	Guatemala Travel and gift for hosts	\$629.65	Student Travel Agricultural
Program Support Funds	Mileage for Friday's in the Field	\$1,379.45	Tom and Mary Ann Jones Education Endowment
Program Support Funds	Education Endowed Chair Salary	\$55,000.00	Tom and Mary Ann Jones Education Endowment
Program Support Funds	Student Experience Education expenses, STEM Conference	\$2,306.02	Tom and Mary Ann Jones Education Endowment
Program Support Funds	Student Employee Salary	\$21.00	Tom and Mary Ann Jones Science Endowment
Program Support Funds	Misc. Expenses: Motor pool, Student Employee	\$584.01	Tom and Mary Ann Jones Science Endowment
Program Support Funds	Endowed Chair Salary - Deepthi	\$55,000.00	Tom and Mary Ann Jones Science Endowment
Program Support Funds	Travel and Label Maker	\$421.15	Tom and Mary Ann Jones Science Endowment
Program Support Funds	NRCC Symposium & Misc Expenses	\$2,818.31	Wolsborn Environmental Studies Endowment
Program Support Funds	Travel & International insurance	\$796.72	Women's Basketball Scholarship Endowment
Program Support Funds	CTE Salaries	\$20,000.00	Workforce Support Endowment
Program Support Funds	Honorariums for Volunteer Service	\$7,000.00	Wrestling Program Endowment
	Program Support Funds Total	\$447,757.04	
	Grand Total	\$1,267,903.43	





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Soccer
Facility

Northwest College Foundation FY2027 Fundraising Goals

Program Fundraising	2027 Fiscal Year Actual	2027 Fiscal Year Goals	2027 Fiscal Year %	2026 Fiscal Year Actual
Athletic Scholarships	\$ -	\$ 200,000.00	0.00%	\$ 242,797.10
Vibrancy/Student Center Campaign	\$ -	\$ 75,000.00	0.00%	\$ 174,585.92
Scholarships/Affordability Grants	\$ -	\$ 1,000,000.00	0.00%	\$ 1,042,634.87
Program/Other Support	\$ -	\$ 250,000.00	0.00%	\$ 176,595.63
Visual Performing Arts Center	\$ -	\$ -	0.00%	\$ 5,793.08
Gift-in-Kind Contributions	\$ -	\$ -	0.00%	\$ 18,140.00
Fundraising Total	\$ -	\$ 1,525,000.00	0.00%	\$ 1,660,546.60

Appeal Tracking	2027 Fiscal Year Actual	2027 Fiscal Year Goals	2027 Fiscal Year %	2026 Fiscal Year Actual
Athletics - Team Projects	-	25,000	0.00%	29,163.88
Athletics - Trapper Booster Club	-	60,000	0.00%	60,979.32
Fiscal Year End Appeal	-	6,000	0.00%	9,028.78
Foundation Events	-	10,000	0.00%	7,599.00
Friends of Music	-	10,000	0.00%	12,100.31
General Support	-	50,000	0.00%	51,475.53
Giving Tuesday	-	4,000	0.00%	4,097.09
Gift-in-Kind	-	-	0.00%	18,140.00
Individual Solicitation	-	735,000	0.00%	735,537.58
Memorials	-	10,000	0.00%	11,672.74
Outside Projects	-	40,000	0.00%	43,578.65
Pass-through/Named	-	50,000	0.00%	44,225.00
NWC Giving Day	-	200,000	0.00%	185,100.18
Planned Giving - New Estate Gifts	-	120,000	0.00%	216,178.72
Planned Giving - Recurring Estate Gifts	-	40,000	0.00%	40,323.83
Stethoscopes for Students	-	5,000	0.00%	4,149.28
WyoGives	-	10,000	0.00%	7,292.68
Year-End Giving	-	150,000	0.00%	179,904.03
	\$ -	\$ 1,525,000.00	0.00%	\$ 1,660,546.60
Minus State of Wyoming Match	\$ 143,560.00	\$ 200,000.00	71.78%	\$ 143,560.00
Fundraising Total	\$ (143,560.00)	\$ 1,325,000.00	-10.83%	\$ 1,516,986.60

Participation Goals	FY2027 Actual	FY2027 Goals	FY2027 %	FY2026 Actual
Total Number of Donors		1150	0.00%	1109
Donor Acquisition		15%	0.00%	13.57%
Donor Recapture		13%	0.00%	11.80%
Donor Retention		60%	0.00%	57.52%
Alumni Donors		510	0.00%	483
Employee Donors		120	0.00%	117
Increase payroll givers		75	0.00%	72
Employee participation		70%	0.00%	67.05%
Increase Presidential Partners		200	0.00%	191
Key Leadership participation		100%	0.00%	97.37%
Foundation Board participation		100%	0.00%	100.00%



FY2027 Fundraising/Alumni Work Plan

Mission: NWC Foundation cultivates strong relationships that inspire generational giving from our Northwest College community. With sound stewardship of resources, we support student scholarships, campus revitalization, and program innovation.

Vision: Inspiring advocacy and generosity to create a vibrant NWC campus and success for all students.

Introduction

This FY27 annual work plan lays out the Foundation and Alumni programmatic area goals and corresponding timelines from July 1, 2026, to June 30, 2027.

NWC Foundation completed FY26 raising less than the previous year to reach \$1,660,547, but still above our goal of maintaining fundraising of \$1.5 million annually. However, we have not been immune to some of the downturn in donors or dollars in the past few years. The organization needs to continue stewardship efforts with existing supporters and engage new people to build strong donor pipelines and drive future support for Northwest College.

We monitor a variety of metrics, some longitudinally to capture trends, and some on a short-term basis to measure specific activities that you'll see throughout this plan.

Retention and Recapture are tracked to monitor ongoing donor relationships. New donor Acquisition has been identified as priority to drive annual giving.

Significant increases in Recapture and Acquisition over the past couple years make retaining donors more difficult. Some of these increases came as we promoted athletic team projects with parents/family members. Once students leave NWC, these donors' loyalty shifts. Therefore, in FY27, we reduced our Retention goal to 60%, held our Acquisition steady at 15% and decreased Recapture to 13%. We will continue to maintain an emphasis on good communication and stewardship to all donors with a focus on growing the Foundation's donor pipeline for the future.

Benchmarks	2022	2023	FY24	FY25	FY26	FY27 Goal
Retention	57.76 %	66.59 %	65.52 %	54.79 %	57.52%	60%
Recapture	14.03 %	18.13 %	14.34 %	14.10 %	11.80%	13%
Acquisition	6.85 %	9.18 %	14.94 %	13.32 %	13.57%	15%

Major Gifts and Planned Giving

The NWC Foundation is collaborating with Northwest College regarding new priorities for major gift fundraising. The following project areas tie to the College's strategic plan in this manner:

- Student support through scholarships and grant aid as well as athletic scholarships will assist NWC with student recruitment, retention and completion.
- Endowed faculty positions will reduce the dependence on tax revenue and help preserve quality staffing at NWC.
- Building and enhancing campus infrastructure will help NWC compete with regional institutions.

Most of this fundraising will be completed through individual solicitation and may feature stretched gifts over periods of up to five years. We have updated staff members' donor portfolios and set contact goals to help guide interaction.

The Foundation has matching gift support from NWC/State of Wyoming to help inspire new gifts. Our plan is to designate the following Matching Funds to drive new endowed scholarships:

\$120,000 General/Simple Named Scholarship Endowments

\$60,000 Athletic Scholarships (\$10,000 of this will come from Pepsi per their contract)

\$40,000 for Giving Day incentive funds

- **Scholarships**
 - Driving enrollment is Northwest College's #1 priority. Work to grow general funds that support students with some flexibility for college priorities.
 - Gifts to our Affordability Grant program will count as scholarship funds as well. This grant program provides support for students whose families are financially challenged to meet college expenses.
 - Investigate business support for CTE/Workforce Development scholarships.
- **Trapper Champions**

Several years ago, NWC Athletics/Trapper Booster Club made raising endowed funds for athletic scholarships a priority.

 - Continue to focus on Named Athletic Scholarships to support recruiting student-athletes to NWC. Raise a minimum of \$100,000 in endowed scholarships.
- **Endowed Chairs**

Promote opportunities for a new endowed chair position.

 - Endowed faculty positions will reduce the dependence on tax revenue and help preserve quality staffing at NWC.

- **Visual and Performing Arts Facility**

Participate in facility planning to prepare for a major facility campaign.

- Determine if time is right for a feasibility study with donors.

- **CTE Program Development**

Collaborate with NWC regarding new program development.

- **Vibrancy Campaign**

Revenue from the Student Center campaign will continue as the last pledges are paid off.

- **Planned Giving**

Planned Giving provides a tremendous growth opportunity.

- Continue to partner with PG Calc regarding marketing to help prompt legacy gifts for the future.
- Conduct outreach to educate area professional advisors about the Foundation.
- Incorporate messaging from Wyoming's charitable community regarding the '5 to Thrive' focus seeking that people dedicate 5% of their estates to charities they care about.
- Contact folks who show an interest in legacy giving.

Annual Giving

Loyalty is no longer a primary driver for alumni giving. Donors gravitate toward social or cause-oriented motivations they find meaningful. Involvement is a key factor to inspiring support. We must develop projects around passion points that impact our donors as well as work to improve the overall donor experience.

We introduced a 3-month series of welcome email messages targeted to new alumni to engage them in activity with our office. We also use technology to prompt donors and prospects to evaluate their options for doubling donations with corporate matching gifts.

- **NWC Giving Day – March 11-12, 2027**

Giving Day creates excitement about accumulating donations over a 24-hour period and promotes the desire to participate in a social activity. Our GiveCampus platform allows donations to projects and challenges to be tracked in real time for transparency and to incentivize additional participation. This year we will:

- Partner with NWC academic and program areas on smaller projects, typically ranging from \$1,000 to \$2,500.
- Continue with some fun competition into a Campus Rally and activity that will spur employee support.
- Secure ‘Matching Money’ and ‘Challenge Bonuses’ for reaching milestones.
- Raise \$200,000 from 300 donors.

- **Year-end Giving**

Multiple Fall solicitations (direct mail, email, social media) are conducted as part of a single multi-media appeal, with segmented messaging for alumni and community members.

- **Trapper Booster Club/Athletics**

The Booster Club conducts programming to generate audiences and support for athletic teams. TBC fundraising encompasses community level giving. Proceeds from club activities/events are mostly dedicated to Athletic Scholarships. We also facilitate ‘friends and family’ support with players/coaches using team-specific web pages.

- Memberships and Business Banner Program
- Trapper Bonanza golf tournament/Calcutta
- Gameday/tournament Sponsorships, etc.
- Team Fundraising

- **Special Program appeals**

These solicitations are conducted to support popular programs or satisfy donors’ desired manner of giving.

- Friends of Northwest Music
- Stethoscopes for Students
- Giving Tuesday (national theme) / WyoGives (statewide focus)
- Recurring gift options, especially targeted to young alumni

Employee Giving

Retirements and downsizing have impacted employee giving over the past decade. Newer/younger faculty and staff are not committing resources to the extent our past long-term employees did. We plan to incorporate an employee challenge of some type in Giving Day this year with an activity that will culminate at the Campus Rally.

Work continues in building relationships with all employees on campus and maintaining connections to past employees. Our NWC4Life retiree benefits and newsletter help bridge the Foundation to former employees.

- **Overall Employee Giving goals for FY27 include:**
 - \$50,000 of employee giving in the one-year period (\$51,628 in FY26)
 - 70% Participation of the 173 permanent employees (117 donors or 68% in FY26)
 - 75 Employees registered for payroll giving (72 participated in FY26)

Communications/Stewardship

Conducting stewardship activities and sharing the impact giving has on students/NWC promotes good will and provides accountability to donors. Proactive promotions will also engage new individuals or audiences.

- **Branding/Marketing**

Develop communications plan with messaging designed for various publications/media.

 - Complete transition of smaller publications to new graphic design style.
 - Provide event information, campus news and program updates, and alumni and donor features in written and email newsletters.
 - Maintain social media presence; share NWC content to expand coverage options.
- **Advertising/Public Relations**
 - Promote broader sense of NWC Foundation work through advertising or timely news releases.
- **Maintain donor stewardship communications**
 - Timely gift acknowledgment
 - Complete donor reporting in Foundation Annual Report and endowment status reports, plus student thank you letters.
 - Steward donors with Calendar featuring NWC photos.
 - Update/develop Donor Profiles for named scholarships to capture individual stories.
 - Reimagine New Donor/Welcome Back materials/interaction.
 - Incorporate student video thank you messages and stories.

Events

Events are used to increase and enhance donor/prospect connections to NWC and promote giving opportunities.

- **Foundation/Alumni activities** planned for the coming year include:

- Ice Cream with Dinosaurs: August 24
Alumni Association introduction with new students
- Paint the Town Red August 28
✓ Alumni Beer Garden; Develop as 'Homecoming' event/tradition
- Trapper Bonanza Golf Tournament August 29
- Alumni Outreach/Trapper Stampede Rodeo September 11
- Trappers Give Back Service Day October 3
- Scholarship Luncheon/Receptions November 10
- Alumni Association help with Preview Day (recruiting) November
- Presidential Partners Holiday Reception TBD
- December Graduate Cap-N-Gown Photo Drop-in December 8
- Alumni Mentoring Promo Party January
- Alumni Outreach/Powell Winter
- Alumni Outreach/Red Lodge Spring
- Friends of Music Pre-concert Reception April 17
- Distinguished Alumni Luncheon with Alumni Board May 15
- 2027 Alumni Car Show June 26
✓ With PHS Reunion weekend

- **Individual/small group cultivation**

Schedule activities to develop relationships, including campus tours/lunches/dinners. Look for opportunities to play off existing campus activities such as cultivation events (Rodeo Gala, concerts, art, photography shows, etc.)

- Conduct Cultivation Session with Cody Board Members TBD

Foundation Board of Directors

The Foundation Board's new strategic plan is aligned with NWC ensuring the organization's work is relevant to Northwest College. Beyond details already noted in this work plan, the Board will:

- **Strategic Plan activity/Board member engagement**
Use committees to identify work and goals within their respective areas.
 - Implement five-year plan.
 - Conduct policy review and facilitate updates as necessary.
 - Develop an online policy repository for easy board access.
 - Transition the Board Directory to an online format.
 - Develop video modules to create an educational/onboarding library.
 - Strive for 100% giving.
 - Promote interaction with other volunteer Boards and NWC.
- **Staffing and operational growth**
Safeguard operations for stability.
 - Promote employee training that creates redundancies in Foundation operations.
 - Maintain investment management processes to generate financial returns for endowment obligations and Foundation operations.
- **Provide oversight to fundraising and use of private gifts**
 - Collaborate with the College to identify fundraising opportunities that help move NWC forward with its vision and mission.
 - Manage assets to produce necessary cash flow for supporting NWC, including NWC Quasi-endowment funds.
 - Continue drafting Scholarship Donor Profiles to capture individual stories.
 - Collaborate with NWC to conduct Wasden Series AI Presentation.

Alumni Association/Board of Directors

The NWC Foundation administers NWC's Alumni Association to ensure engagement activities are mutually beneficial to both organizations. The AA Board's strategic pillars flow from CASE's four Alumni Engagement categories. Priority work in each area is noted below.

Communication: Increase awareness of the NWC Alumni Association while also advocating for Northwest College.

- **Branding/Marketing**
Maintain consistent communications to alumni through various marketing channels.
 - Partner with outside marketing firm to develop alumni-specific materials.
 - Alumni constituency outreach mailing – target nursing for FY27.
- **Distinguished Alumni**
Conduct nomination and selection process for annual recipient.
 - Host post-graduation luncheon to honor Distinguished Alum.

Resource Development/Philanthropy: Secure resources to build a top-performing Alumni organization that helps NWC thrive.

- **Operational growth**
Collaborate with the NWC Foundation Board regarding staffing and resource development opportunities to fund AA programs.
 - Secure 100% giving participation from Board members to an operating endowment for the Alumni Association.
- **Scholarship facilitation**
Conduct AA scholarship selection process for both traditional-age and adult students.
- **Promote opportunities for Giving to NWC**
 - Continue Trappers Give Back Day to encourage alternative means of supporting NWC.
 - Research options for campus memorial garden.

Experiential: Broaden and deepen constituent engagement, developing meaningful relationships with NWC students and alumni.

- **Student Introduction activity**
 - Host a Kick-off Weekend activity to introduce incoming students to the Alumni Association.
 - Consider collaboration for Finals Packages in December.
 - Host graduation photo reception for December graduates. Distribute graduation gift/welcome packet to both May and December graduates.
- **Alumni Outreach events**
 - Conduct a series of regional events to build awareness of the Alumni Association and good things happening at NWC.
 - Consider opportunities to conduct biannual reunions for specific audiences – pending with Forensics and Photo.

Volunteer: Cultivate life-long connections and a shared commitment to Northwest College.

- **Mentoring Program**
Actively facilitate mentoring program to benefit students/alumni in their career pursuits and provide an opportunity for alumni to give back based on their experience.
 - Host mentor recruiting event.
- **Support NWC Student Recruitment**
Coordinate Alumni volunteers to assist in Preview Day, an on-campus recruiting event.
- **Partner with NWC Programs**
 - Explore development of campus speaker opportunities.

FY2027 NWC Foundation Work Plan

Strategic Goal/Priorities:

Responsibility:

Timeline:

Status:

Pillar 1: Infrastructure

Build a top-performing advancement organization with a culture of collaboration and continuity for the future.

Strategy 1: Recruit, develop and retain first-rate employees to ensure organizational continuity.

- Goal 1** Maintain Fundraising Performance Management system.
- a. -Establish fundraising staff goals and tracking for contacts and proposals.
 - b. -Conduct monthly Prospect Reporting meetings
- Goal 2** Promote teamwork among employees, nurturing positive office environment and work redundancy.

Executive Director
Staff
FR Staff
Executive Director

FY27
FY27
Ongoing
Ongoing

Strategy 2: Recruit and engage Board members in support of the Foundation.

- Goal 1** Enhance Board member development and participation via education and mentoring.
- a. -Add more structure to the current Mentoring Program for new directors
 - b. -Create video modules for Board member education/onboarding
 - c. -Publish an online Board Directory
 - d. -Maintain 100% participation in giving from the Board
- Goal 3** Engage all committees in strategic work for the Foundation.
- Goal 4** Promote social connections and involvement with NWC activities among Board members.
- b. -Host a social hour for directors and spouses; include Presidential Partners

Governance Comm/Staff
Governance Comm/Staff
Staff
Staff
Board
ED/Board
Governance Comm/Staff
Staff

Ongoing

Annual tactics
Annual tactics
Holiday 2026

Strategy 3: Implement Foundation strategic plan to accomplish long-term goals and drive operations forward.

- Goal 2** Monitor and implement operational best practices using CASE's Foundation Management and Governance Checklist.
- a. -Complete the recommended policy review timeline
- Goal 3** Complete policy and procedures manual.
- a. -Develop an online policy repository
- Goal 4** Maintain communications with the College's leaders to support NWC mission, vision, and priorities.
- a. -Serve as member of NWC President's Staff; assist with Strategic Planning
 - b. -Assist in grant development to sustain programs at NWC.
 - c. -Participate in planning to identify future fundraising priorities.

Governance Comm/Staff
Governance Comm/Staff
ED/Board

Annual checklist review
Oct-26
Policy review FY24-26; manual development FY27

ED/Board
Executive Director
Executive Director
Executive Director

Ongoing
FY27
FY27
FY27

Pillar 2: Involvement

Engage NWC students, alumni, and friends of the College in meaningful relationships that inspire pride and giving for NWC.

Strategy 1: Develop and implement major fundraising initiatives anchored in NWC priorities.

- Goal 1** Expand philanthropic support to NWC, averaging \$1.5 million or more raised annually, inclusive of all fundraising activity.
- a. -Promote Named Scholarship Endowments with matching gift funds
 - b. -Consider Feasibility Study for next major campaign
- Goal 2** Aim to raise more money each year than previously secured to pace with inflation.
- Goal 4** Conduct Trapper Champions Athletic Scholarship fundraising raising \$100,000 (gifts and pledges) to endow scholarships.
- Goal 5** Advocate for matching funds from the State of Wyoming.

ED/Staff/Board
FR Staff
Staff/Board
ED/Staff/Board
FR Staff/Athletic Director
Staff/Board/NWC President

Annual tactics
FY27
FY27
Ongoing
Annual tactics
Annual tactics

Strategy 2: Enhance annual giving pipeline to increase support for the College.

- Goal 1** Grow participation in NWC Giving Day by raising a minimum of \$200,000 from 300 donors annually.
- Goal 2** Increase donor acquisition, recapture and retention through focused donor relations and stewardship.
- a. -Conduct follow-up to donors at risk of lapsing
 - b. -Develop recurring gift program
- Goal 3** Leverage/grow partnerships with program-related industries for scholarships, equipment, or support, especially CTE.

FR Staff
FR Staff
FR Staff
FR Staff
Staff/Board/NWC

Annual tactics
Annual tactics
FY27; Annual tactics
FY27
FY27; Annual tactics

Strategy 3: <u>Promote the impact Transformational Gifts bring to Northwest College.</u>			
Goal 1	Enhance Planned Giving marketing program.	ED/Staff	Annual tactics
a.	-Incorporate 5 to Thrive messaging into PG marketing	FR Staff	FY27
Goal 2	Develop and grow relationships with area PG advisors (attorneys, CPAs, investment advisors, realtors, insurance agents, etc.).	Development Comm/Staff	Annual tactics
a.	-Distribute flyer specialized for advisors; conduct follow-up to key partners	FR Staff	FY27
Goal 3	Share legacy stories to seed ideas for others.	Development Comm/Staff	Ongoing
Strategy 4: <u>Strengthen interaction/communication between Foundation, Alumni Association, and Trapper Booster Club boards to align work.</u>			
Goal 2	Collaborate regarding community engagement with AA and TBC Boards.	Staff/Board	Annual tactics
a.	-Support Alumni Activities - events, mentoring, merchandise sales, communications.	Jill	Ongoing
b.	-Collaborate with TBC - events, memberships/banners, game-day activities.	Cory	Ongoing
Pillar 3: Investment			
Ensure sound stewardship of resources through prudent investment management and alignment of assets in support of NWC priorities.			
Strategy 1: <u>Provide quality management of NWC Foundation assets.</u>			
Goal 1	Monitor systems to steward the Foundation's investments and support financial operations.	Finance Comm/Staff	Ongoing
Goal 2	Facilitate timing of annual payments to NWC to maximize resources.	Finance Comm/Staff	Ongoing
Goal 4	Work with donors to adjust scholarship/endowment criteria so funding can serve the College's needs.	ED/Staff	Annual tactics
Goal 5	Collaborate with the College regarding endowment management for NWC operations	ED/Staff/NWC	Annual tactics
a.	-Establish more quasi-endowments with NWC.	Executive Director	FY27
b.	-Coordinate endowment payouts with NWC	ED/Found Acct.	FY27
Strategy 2: <u>Increase NWC Foundation's Unrestricted resources to build financial flexibility for operations.</u>			
Goal 1	Evaluate unrestricted assets as a financial base for operations.	Finance Comm/Board	Ongoing
a.	-Increase cash reserves annually	Staff/Board	Ongoing
b.	-Establish a Strategic Quasi-endowment to support initiatives at NWC	Finance Comm/Board	FY27
Pillar 4: Impact			
Strengthen donor connections by demonstrating appreciation and accountability and showcasing the effect of giving on academic innovation and student success at NWC.			
Strategy 1: <u>Build Foundation/Alumni Brand via enhanced marketing efforts.</u>			
Goal 3	Create an annual communications plan to raise awareness of the Foundation's work and accomplishments.	Staff/Board	Annual tactics
a.	-Complete transition of smaller publications to new graphic design style	Staff	FY27
Strategy 2: <u>Steward donors and the resources they provide to support NWC.</u>			
Goal 1	Express appreciation to donors at levels appropriate to respective giving.	DA&S Comm/Staff	Ongoing
a.	-Explore options for New Donor and Welcome Back communications	Jill	FY27
b.	-Incorporate video messages from students to show appreciation and share stories	Staff	FY27
Goal 2	Complete donor profiles for all named scholarships managed by the Foundation.	Staff/with writing help?	FY24-FY28
Goal 4	Provide accountability to donors through reporting regarding use of funding.	Staff	Ongoing
Strategy 3: <u>Improve partnerships with NWC departments/programs/employees.</u>			
Goal 1	Implement 'account executive' linkages with designated campus areas to enhance information flow and program knowledge.	FR Staff	Ongoing
a.	-Collaborate with NWC program areas to identify departmental projects for Giving Day.	FR Staff	FY27
b.	-Participate in college-wide activities such as Kick-off Weekend, Paint the Town Red and Graduation	Jill	Annual tactics; FY27
Goal 2	Identify successful alumni to showcase and/or recruit as program ambassadors.	Staff/NWC	Ongoing
a.	-Provide alumni volunteers for student recruitment events and Trappers Give Back Day	Jill	FY27
Goal 3	Facilitate guest lecturers.	Staff/NWC	FY27
a.	Collaborate on Wasden Series AI Presentation	Staff/NWC	FY27