

**WRIGHT STATE UNIVERSITY
BOARD OF TRUSTEES**

**Advancement Committee Report
November 2017**

1. Alumni Relations Report
2. Wright State Foundation Financial Report
3. Development Report
4. *Discover Your Story*: Archives Campaign Report

Advancement Committee Report

Alumni Relations Report

November 2017

Updates:

50th Anniversary Homecoming

- Many of the events were held during Homecoming Weekend this year to promote the 50th anniversary of the university. **Almost 3,000 event attendees participated throughout the weekend, Sept. 29 – Oct. 1, 2017, making this our largest Homecoming celebration ever!**
 - Reunion of the founding classes (1967-1971)
 - Black Alumni Reunion
 - Greek Alumni Reunion
 - *Guardian* and Radio Station Alumni Reunion
 - Student Government Alumni Reunion
 - Residence Life and Housing Alumni and Staff Reunion
 - Campus Rec and Student Union Administrative Student Staff Alumni Reunion
 - Alumni College, with many events open to the public sessions
 - COSM Pub Science
 - CEHS Trivia Night
 - Alumni Achievement Awards
 - Homecoming Festival
 - Legacy Scholarship Brunch
 - Campus Tours

1967 Society

Under the advisement of the Alumni Relations and Annual Giving Offices, the '67 Society is an Advancement Student Organization with the mission to provide programs and experiences for students focused on the importance of student philanthropy, connecting students and alumni, and campus pride. This past fall, the '67 Society was instrumental in the success of Wright State's 50th Anniversary Homecoming Festival along with our inaugural "Wright Day to Give". The '67 Society engaged in conversations with students about the importance of giving back to Wright State through foundation scholarships and program funds as a part of the Wright Day to Give. **Of the 548 donors for Wright Day to give, students comprised of 10% of the donors during the 50 hour campaign.** In addition to Wright Day to Give, the '67 Society collaborated with the Marketing Club to participate in Wright Brothers Day. The '67 Society solicited \$1,000 in unrestricted funds from the Wright State Foundation to put in a money machine which allowed students to learn more about how the foundation supports the university, the

importance of supporting the university, and giving back. From the money each student collected in the money machine, they had the opportunity to designate which foundation fund they would like to support. As a result of this Wright Brothers Day Activity, students gave \$168 to the Rise.Shine. Scholarship, \$178 to the Mission Scholarship, \$267 to the Friendship Food Pantry Fund, and \$387 to the Lillie P. Howard Need-Based Grant Fund.

Upcoming Event Updates:

Wright State Alumni Service Day – November 11

All Alumni, family, and friends are encouraged to join the Wright State Alumni Association for Wright State Alumni Service Day. Engage in community service at one of the local nonprofit sites.

- Foodbank
- Ohio's Hospice of Dayton
- Clothes that Work

Life after Wright State

A Series of programs are currently being planned for this year's Life after Wright State Series. Thanks to a grant through Wright-Patt Credit Union, we will be bringing Peter Bielagus, a nationally known financial educator, to campus. Peter travels the country talking to college students about how to secure their own financial future. Peter will visit campus on Wednesday, March 21, 2018.

Upcoming Wright State Alumni Events: (Find more information at wrightstatealumni.com)

November 11 – Wright State Alumni Service Day
November 17 – NLA Alumni Society Holiday Party
November 29 – Hire Alumni – Only Career Fair
November 30 – Alumni Association Leadership Holiday Party
January 11, 2018 - Raider pre-game gathering at NKU
January 20, 2018 – African American Alumni Society Annual Meeting
January 26, 2018 – Annual Alumni Beer Tasting
February 1, 2018 - Raider pre-game gathering at CSU
February 16, 2018 – Alumni Night at the Game
February 24, 2018 – Rowdy Gras
June 2, 2018 – Cedar Point Day
July 29, 2018 – Wright State Alumni Kings Island Day
October 5-6, 2018 – Homecoming Weekend

**Advancement Committee Report
Wright State University Foundation Report
November 2017**

Financial markets continued their strong performance in the first quarter of FY18. The endowment portfolio returned 3.24% (vs. 3.15% benchmark) and the restricted (non-endowed) portfolio returned 3.01% (against a benchmark return of 2.81%) through September 30th. The value of our total investments increased \$1.9 million during the quarter, net of a \$1.6 million liquidation that was used to purchase bonds for the Lake Campus construction project. Total market value of our investments was \$119.1 million on September 30th. Investment allocation for both portfolios conformed to strategic ranges established in our investment policy statement and were distributed among equities (44%), fixed income (25%), multi-asset (14%) and alternative investments (17%). Asset allocation, market value, and rates of return specific to the endowment portfolio are provided in the following exhibits.

With respect to our endowment portfolio, equities were the strongest performers during the quarter returning a positive 5.15%. All our equity investments posted positive returns, led by world equity (ex-U.S.) at 7.72% and domestic equities at 3.87%. Domestic small cap returns were slightly higher than large cap returns. In the fixed income space, a positive return of 1.56% was generated, led by emerging market debt (+3.90%) and high yield bond (+2.25%) investments. Our dynamic asset investments also generated a positive return of 3.47%. Alternative investments returned only 0.51% for the quarter with gains from our hedge fund investment (+2.07%) being offset by a loss in our energy sector distressed debt investment (-2.19%).

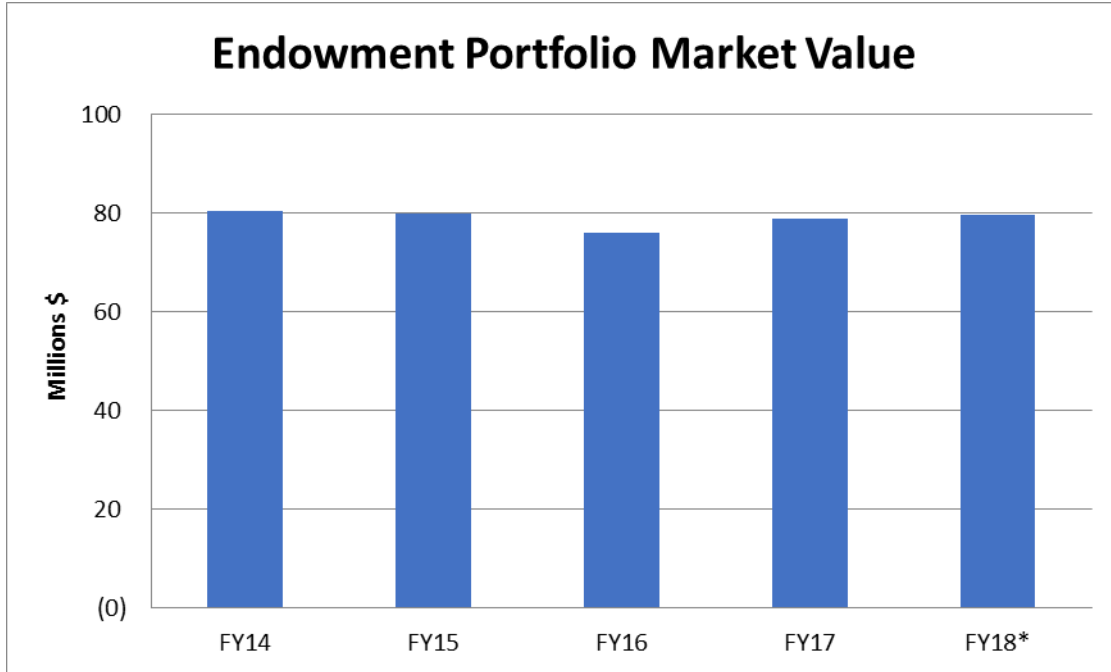
Growth in the Foundation’s unrestricted net assets continued during the first quarter, although at a rate slightly less than the same period in FY17. Unrestricted net assets have increased \$662 thousand for the year, ending the quarter with a value of \$8.2 million for an increase of 8.8%.

The Foundation’s current endowment portfolio composition, including target allocations, actual allocations, and market values, as of September 30, 2017, is presented below:

Endowment Portfolio Composition

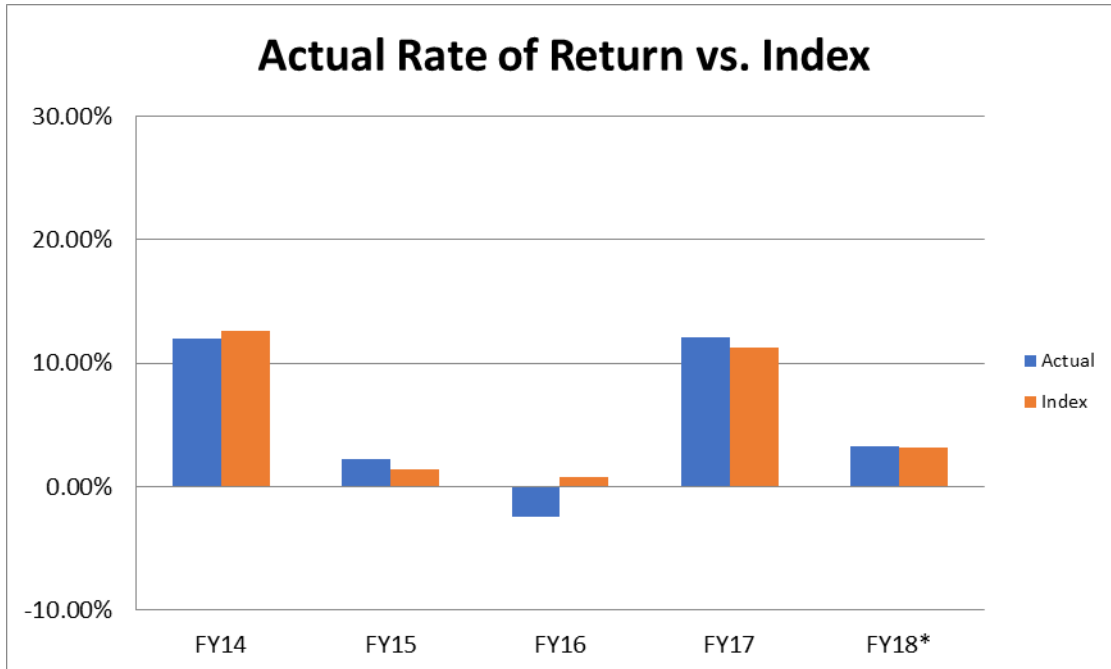
Asset Class	Target Allocation	Actual Allocation	Market Value September 30, 2017
Equity	42%	46%	\$36,214,835
Fixed income	24%	20%	16,288,454
Multi-asset	14%	15%	11,628,906
Hedge funds	8%	8%	6,446,861
Private equity	8%	7%	5,498,680
Energy Debt	4%	4%	3,560,834
Cash & equivalents	0%	0%	0
Totals	100%	100%	\$79,638,570

Endowment Value



*Through September 30, 2017

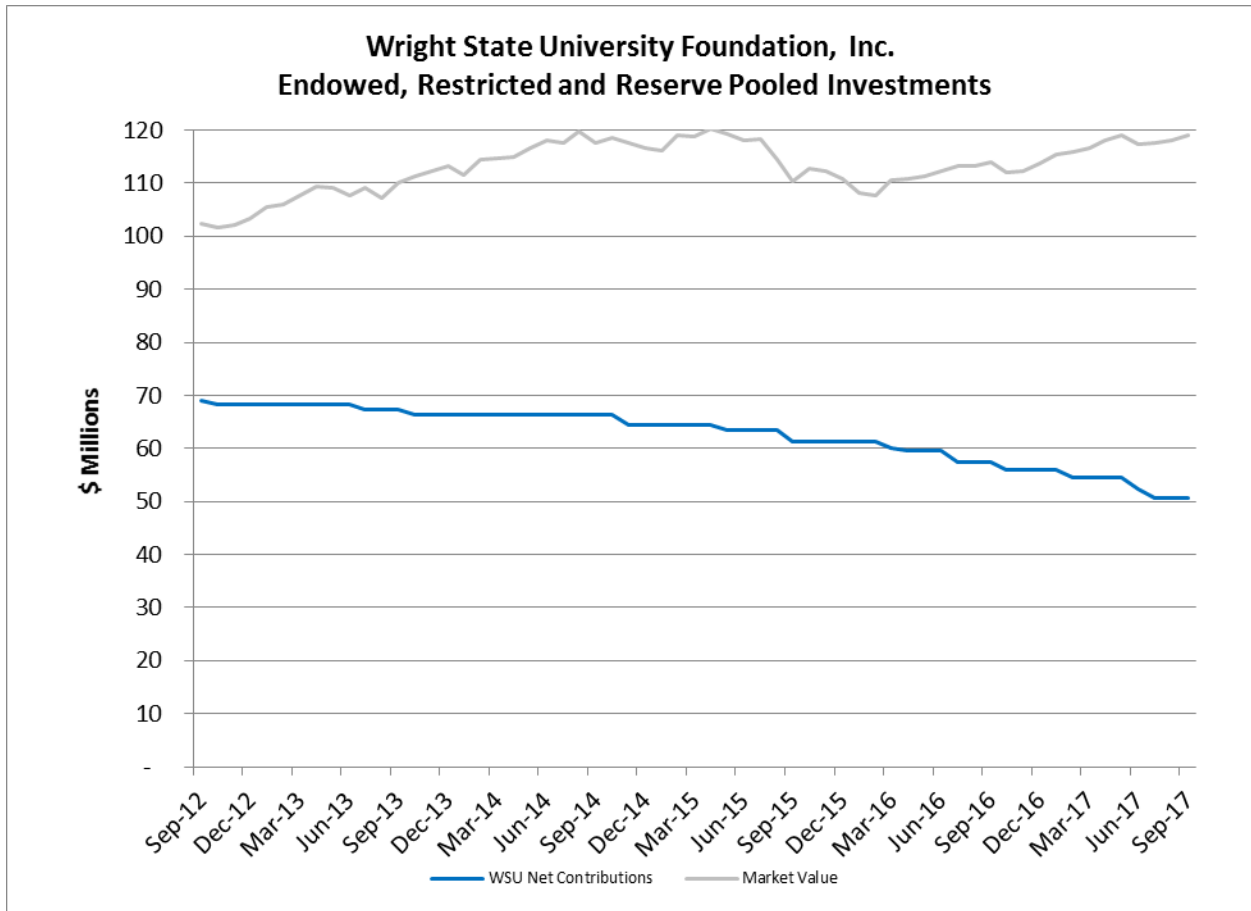
Endowment Historical Rates of Return



*Through September 30, 2017

The index is composed of various market indices of like asset classes in the same proportion as the Foundation's approved asset allocation as defined in its Investment Policy Statement (IPS).

All Portfolios Value vs. Contributions



WRIGHT STATE UNIVERSITY FOUNDATION, INC.

Report of Fundraising Totals By Source and Unit

Fiscal Year-to-Date to September 30, 2017

(including totals from prior fiscal year)

BY SOURCE

SOURCE	CASH ¹	PLEDGES ²	IRREVOCABLE	GIFTS OF	REVOCABLE	CURRENT FYTD	PRIOR FYTD
			DEFERRED	PROPERTY ⁴	DEFERRED		
			GIFTS ³		GIFTS ³	TOTALS	TOTALS
Alumni	\$90,664	\$33,710	\$0	\$190	\$11,198	\$135,762	\$1,206,073
Corporations	333,955	0	0	24,582	0	358,537	340,637
Foundations and Organizations	71,413	0	0	70	0	71,483	316,626
Friends	122,050	4,525	0	3,599	0	130,174	147,605
CURRENT FYTD TOTALS	\$618,082	\$38,235	\$0	\$28,441	\$11,198	\$695,956	
PRIOR FYTD TOTALS	\$881,325	\$43,050	\$0	\$136,566	\$950,000		\$2,010,941
% CHANGE FROM PRIOR FISCAL YEAR	-29.9%	-11.2%	N/A	-79.2%	-98.8%	-65.4%	

BY UNIT

UNIT	CASH ¹	PLEDGES ²	IRREVOCABLE	GIFTS OF	REVOCABLE	CURRENT FYTD	PRIOR FYTD
			DEFERRED	PROPERTY ⁴	DEFERRED		
			GIFTS ³		GIFTS ³	TOTALS	TOTALS
Boonshoft School of Medicine	\$59,820	\$0	\$0	\$0	\$0	\$59,820	\$68,999
College of Education & Human Services	4,600	1,925	0	0	0	6,525	4,485
College of Engineering & Computer Science	41,031	50	0	0	0	41,081	111,264
College of Liberal Arts	54,168	14,465	0	3,634	0	72,267	67,718
College of Nursing & Health	39,820	130	0	0	11,198	51,148	16,021
College of Science & Math	56,611	1,450	0	21,353	0	79,414	300,129
Curriculum & Instruction	31,229	50	0	0	0	31,279	575
Enrollment Management	3,782	125	0	0	0	3,907	7,700
Intercollegiate Athletics	137,308	12,500	0	0	0	149,808	113,411
Lake Campus	300	0	0	0	0	300	20,000
Other	63,746	7,190	0	0	0	70,936	471,058
Raj Soin College of Business	21,241	200	0	0	0	21,441	519,161
School of Professional Psychology	5,650	100	0	0	0	5,750	109,730
Student Affairs	81,661	0	0	3,454	0	85,115	182,145
University College	0	0	0	0	0	0	0
University Libraries	17,115	50	0	0	0	17,165	18,545
CURRENT FYTD TOTALS	\$618,082	\$38,235	\$0	\$28,441	\$11,198	\$695,956	
PRIOR FYTD TOTALS	\$881,325	\$43,050	\$0	\$136,566	\$950,000		\$2,010,941
% CHANGE FROM PRIOR FISCAL YEAR	-29.9%	-11.2%	N/A	-79.2%	-98.8%	-65.4%	

¹ Cash, checks, credit cards, electronic transfers, matching gifts, insurance premiums, etc.

² Conditional, deferred, irrevocable and revocable pledges.

³ Charitable gift annuities, charitable lead trusts (CLTs), charitable remainder trusts (CRTs), life estates, pooled income funds, Foundation-owned insurance policies, etc.

⁴ Gifts-in-kind, real property (land and buildings), tangible personal property (vehicles, equipment, books, art, auction items, etc.), intangible personal property (patents, copyrights, etc.), etc.

⁵ Bequest intentions, donor-owned insurance policy beneficiary, donor-owned retirement asset beneficiary, etc.

WRIGHT STATE UNIVERSITY FOUNDATION, INC.

**Report of Total Receipts: Cash and Gifts-in-Kind
For the Month Ended September 30, 2017 and 2016**

MONTH-TO-DATE

GIFT SOURCE	SEP 2017		SEP 2016		PCT. CHANGE	
	DONORS	DOLLARS	DONORS	DOLLARS	DONORS	DOLLARS
Alumni	300	\$59,337	353	\$126,104	-15%	-53%
Corporations	28	106,392	27	56,195	4%	89%
Foundations and Organizations	16	40,166	7	229,327	129%	-82%
Friends	336	68,658	392	67,892	-14%	1%
SUBTOTAL CASH RECEIPTS	680	\$274,553	779	\$479,518	-13%	-43%
Gifts-in-kind	5	25,015	5	16,100	0%	55%
TOTAL ALL RECEIPTS	685	\$299,568	784	\$495,618	-13%	-40%

FISCAL-YEAR-TO-DATE

GIFT SOURCE	FY2017		FY2016		PCT. CHANGE	
	DONORS	DOLLARS	DONORS	DOLLARS	DONORS	DOLLARS
Alumni	535	\$137,869	640	\$298,540	-16%	-54%
Corporations	59	556,333	59	217,139	0%	156%
Foundations and Organizations	22	72,413	23	320,827	-4%	-77%
Friends	549	161,868	655	194,593	-16%	-17%
SUBTOTAL CASH RECEIPTS	1,165	\$928,483	1,377	\$1,031,099	-15%	-10%
Gifts-in-kind	11	28,441	8	136,566	38%	-79%
TOTAL ALL RECEIPTS	1,176	\$956,924	1,385	\$1,167,665	-15%	-18%

**Advancement Committee Report
Development Report
November 2017**

Planned Giving Update

FY2017 Planned Gift Results:

- 15 planned gift commitments with a stated gift value of \$2,353,000 were recorded in FY17. All but one are bequest expectancies; one charitable gift annuity was written.
 - Of note, seven of these planned gifts were made by current faculty or staff or WSU retirees.

- One planned gift was realized. We received the initial distribution (\$30,000) from a planned gift donor who was unknown to us. A smaller amount will likely come to us at the closing of the estate.
 - We were notified of three additional planned gifts that are now in process of realization. The assumed/projected value of these is \$3,050,000.
 - Of these, two are from WSU Faculty Retirees.

- As of the end of the fiscal year, there were eight additional planned gifts in discussion with an estimated projected value of \$2,407,000. There are currently another 19 potential planned gifts in early stage discussion

The Wright State University Planned Giving Website was redesigned and updated through planned giving marketing partner and web host, Crescendo Interactive. It serves as the single source of information for planned giving prospective donors. (wright.edu/plannedgiving)

Mr. Bill Bigham has been named as new Director of Planned Giving. Bill previously served as our Director of Development for the College of Nursing and Health and University Initiatives. His leadership skills, fundraising success, and prior work with donors and colleagues position him for success in this critically important segment of our Advancement Division.

Previous Director, Regis Lekan, retired from the University this summer but has been retained by the Foundation until the end of the calendar year 2017 to work directly with Bill to transition the Planned Giving Program and the many relationships he has developed over his years of service.

Annual Giving Update

Annual gift solicitation (gifts of up to \$10,000), building off the momentum of the Rise. Shine. Campaign, engaging more and more donors with Wright State, increasing current individual giving levels, and identifying new major gift prospects.

The Wright Day to Give: September 30 – October 2

In honor of our 50th birthday, Wright State launched its first-ever stand-alone giving day, a digital philanthropic challenge to our alumni, friends, parents, students, faculty, and staff. 50 years, 50 hours to make an impact. A few objectives included:

Objectives

- To continue to encourage Wright State University's alumni giving, following the success of the Rise. Shine. Campaign
- To encourage participation in Giving Day events by emphasizing its uniqueness and 50th anniversary significance
- To increase alumni engagement by demonstrating Wright State pride to all alumni audiences
- Encourage our students to give back to Wright State

Record breaking results

- 548 Donors
- \$47,502 Dollars
 - \$12,500 matching gifts from two matching gifts

Fall Direct Mail Appeal

The annual fall direct mail appeal will drop in the mail by November 9. It will be customized with student features in each academic area. The primary audience is alumni, however, without a traditional Phonathon in FY18, this appeal will also be sent to friends who are past donors.

- New strategy in FY18
 - Expanding our appeal to include a historical timeline featuring some of Wright State University's biggest milestones in our 50th anniversary year.
 - Expanding our audience in recognition of our 50th anniversary

CSIC Retiree Phonathon Campaign

For the third year, we will be calling our Retirees who have not contributed yet in the calendar year. These calls will take place over the months of November and December.

Advancement Committee Report
Discover Your Story: Archives Campaign Report
November 2017

Campaign Launch:

- We launched the campaign on October 4th with Distinguished Honorary Chair, Amanda Wright Lane, and National Honorary Chair, David McCullough
- We hosted 140 guests in the actual Archives space located at 2455 Presidential Drive
- We announced an all-cash goal of raising \$6.5 million
- The WSU Foundation has designated budgetary support to underwrite the costs of the campaign

Gifts Committed to Date:

- To date, we've raised \$422,000 toward the goal
- There are 3 named spaces included in the giving totals
 - √ Amanda Wright Lane Lobby
 - √ Dr. Lewis Shupe Oral History Lab
 - √ Dr. Gary Barlow Conference Room

Project Description:

- The Archives Center Modernization project provides for the renovation of 30,000 SF of space located at 2455 Presidential Drive and the relocation of the current Special Collections and Archives. The new space will provide appropriate environmental conditions to lengthen the life of these priceless collections. Controls will include protections from temperature, humidity, light, fire, and air quality. The provision of adequate space to house over 15,000 linear feet of collections, including 20,000 volumes with more than 16,000 books, is a major objective of the project. They are moving from their current space in two campus locations of 12,000 SF to a dedicated space of 30,000 square feet.

Campaign Theme:

- The theme selected was “**Discover Your Story**”. Our intention with this theme was to connect everyone to history and encourage them to discover areas where they connect with, and relate to, the WSU Special Collections and Archives. Our thought was to make the theme personal so that it resonated with the greatest number of people.
- Presentations are available to community groups, service clubs, and interested persons by contacting the Advancement Division at 937-775-2350.
- We are connecting with local and national foundations, alumni and friends, community groups with an interest in history and archives, and persons who are generally interested in preservation of our history to discuss gifts in support of the Archives Campaign.