Greetings!

We are proud to present the Wright State University Foundation’s strategic plan for 2017–2019. Developed by a team of foundation board members and staff, this plan builds on the success of Rise. Shine. The Campaign for Wright State University and positions the foundation for an even greater impact on the future of Wright State University.

The Wright State University Foundation is celebrating its 50th anniversary in 2016, and has now matured to the point where it is invaluable in supporting the strategic endeavors of the university. Our new strategic plan will help cement the foundation’s role as the preeminent fundraising arm for Wright State University.

We would like to extend our appreciation to every member of our strategic planning committee for all of their time and effort, and we are grateful for their thoughts and insights. Together, we have created an ambitious, proactive plan that will communicate the guiding principles of the Wright State University Foundation and ensure our positive impact on the university we serve for years to come.

John Lyman, M.D.
Chair, Wright State University Foundation Board of Trustees

Travis Greenwood
Vice Chair, Wright State University Foundation Board of Trustees
Chair, Strategic Planning Committee

Our Vision
The Wright State University Foundation’s vision is to be a best-in-class foundation, matching the resources, passion, and commitment of our donors with the needs of students and the strategic direction of the university.

Our Mission
The Wright State University Foundation’s mission is to partner with Wright State University in promoting and facilitating a culture of engagement and philanthropy by raising funds and managing and distributing the resources entrusted to us, in support of the university’s mission and priorities.

Our Values
We are committed to:
- The needs of students and the passion of our donors
- Responsible stewardship of resources with accountability and transparency
- Long-term relationships with the community and alumni
- Diversity and inclusiveness
- Innovation and resourcefulness

WRIGHT STATE UNIVERSITY FOUNDATION
Foundation Building | 3640 Colonel Glenn Highway | Dayton, OH 45435
937-775-2251 | wright.edu

STRATEGIC PLAN 2017-2019

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GOAL 1 University Partnerships and Engagement — The WSU Foundation will strengthen its relationships and deepen its engagement with the university, building more informed and powerful relationships with Wright State’s administration, students, faculty, and staff. Use enhanced understanding of Wright State’s strategic goals and initiatives to uniquely and powerfully align resources and investments for the long-term benefit of Wright State and its alumni, community, and external constituents.

OBJECTIVE A: Create a greater clarity within Wright State University as to the mission of the WSU Foundation and exhibit over time the WSU Foundation’s critical role in the achievement of the university’s goals.

OBJECTIVE B: Support the university’s highest-priority initiatives through synopses that seek and maximize new funding and vet and prioritize requests for support.

GOAL 2 Stakeholder and Community Engagement — The WSU Foundation will strengthen its image as the premier fundraising arm of the university, clarifying and communicating clearly among our constituencies the mission, vision, and values of the WSU Foundation. Increase awareness and of advocacy for Wright State University, resulting in recognition of the value of Wright State’s excellence in teaching and learning, research, and service to the community.

OBJECTIVE A: Build strategic partnerships with other organizations that will help WSU and the WSU Foundation achieve their goals.

OBJECTIVE B: Stimulate engagement with corporate partners in and around Dayton, as well as nationally and internationally, where situational interests or needs are available.

OBJECTIVE C: Stimulate engagement with corporate partners in and around Dayton, as well as nationally and internationally, where situational interests or needs are available.

OBJECTIVE D: Stimulate engagement with corporate partners in and around Dayton, as well as nationally and internationally, where situational interests or needs are available.

GOAL 3 Philanthropy and Resource Development — The WSU Foundation will increase its role in the philanthropic and resource development efforts for the university through greater engagement of individual board members and a focus on determined fundraising priorities.

OBJECTIVE A: Analyze the changing needs of the university and monitor against the performance of foundations from peer universities to set specific fundraising goals for endowments and other targeted priorities.

OBJECTIVE B: Define the WSU Foundation Board’s role in philanthropic process and develop a model of engagement for business to engage with donors.

OBJECTIVE C: Support the work of the Alumni Association and the Office of Alumni Relations in engaging alumni across the country and strengthening the engagement strategies to build relationships with students and young alumni.

OBJECTIVE D: Achieve continued board development by recruiting and orienting a board with diverse skills, cultural backgrounds, and vocation to bring new perspectives and expertise to the board.

GOAL 4 Portfolio and Asset Management — The WSU Foundation will enhance the long-term integrity of its invested assets through the creation and proactive management of policies and practices that promote growth, mitigate, and produce an appropriate distribution rate to the university.

OBJECTIVE A: Measure and assess the Investment Policy Statement and make necessary adjustments for the ongoing management of the WSU Foundation’s investment portfolio.

OBJECTIVE B: Establish the WSU Foundation’s current spending policy in light of changing market conditions to determine the maximum appropriate distribution rate.

OBJECTIVE C: Inspire donors with powerful messages that serve as call to action, as well as the authentic and unbiased circulation of positive stories about the university to internal, regional, and national media outlets.

OBJECTIVE D: Create a benchmarking plan and schedule to benchmark the WSU Foundation’s investment portfolio against peer institutions and adopt best practices.

GOAL 5 Board and Staff Development — The WSU Foundation will continuously evaluate and monitor board engagement to ensure that board tenure is maximized in the interest of the WSU Foundation and have a strategic approach to identify board members to strengthen their commitment to the WSU Foundation and the university operations and implement assessment tools for board and trustee performance to evaluate and enhance board impact over time.

OBJECTIVE A: Define the WSU Foundation Board’s role in the philanthropic process and develop a model of engagement for business to engage with donors.

OBJECTIVE B: Achieve continued board development by recruiting and orienting a board with diverse skills, cultural backgrounds, and vocation to bring new perspectives and expertise to the board.

OBJECTIVE C: Achieve continued board development by recruiting and orienting a board with diverse skills, cultural backgrounds, and vocation to bring new perspectives and expertise to the board.

OBJECTIVE D: Develop a plan for recruiting, developing, and retaining the most qualified staff to support the execution of our plan.

GOAL 6 Stewardship and Fiduciary Responsibility — The WSU Foundation will better serve its donors and beneficiaries by aligning and adjusting its governance and staffing structure to accomplish the newly defined mission, vision, and values. As a donor-centric organization, the WSU Foundation will operate efficiently, communicate openly and often, and maintain strong metrics of accountability.

OBJECTIVE A: Examine and refine the governance structure to fully support the WSU Foundation’s new mission, vision, and values statement, which emphasizes the board’s role in the philanthropic process.

OBJECTIVE B: Identify and pursue new sources of revenue for WSU Foundation operations, focusing on engaging and volunteer opportunities for board members to strengthen their commitment to the WSU Foundation and the university. Analyze and implement assessment tools for board and trustees performance to evaluate and enhance board impact over time.

OBJECTIVE C: Create a superior donor experience through the fulfillment of donor intentions, excellence in the stewardship of funds, close communication of donor impact, and appropriate expressions of gratitude. Engage each trustee as a partner in creating a superior donor experience.

OBJECTIVE D: Create a set of financial metrics that allow the WSU Foundation to articulate the long-term and year-to-year impact generated from the annual distribution of resources.

OBJECTIVE E: Maintain a strong fiduciary presence by aligning and adjusting its governance and staffing structure to accomplish the newly defined mission, vision, and values. As a donor-centric organization, the WSU Foundation will operate efficiently, communicate openly and often, and maintain strong metrics of accountability.

OBJECTIVE F: Implement an internal and external strong financial controls and organizational checks and balances. Employ open communication and transparency to maintain the public trust.