

**WRIGHT STATE UNIVERSITY  
BOARD OF TRUSTEES**

**Advancement Committee Report  
November 2013**

1. Alumni Relations Report
2. Wright State Foundation Financial Report
3. Development Report
4. Comprehensive Campaign Report

**Advancement Committee Report  
Alumni Relations Report  
November 2013**

- **Homecoming** saw a record number of alumni and students attending our events. Over 700 people attended an Association event over the weekend.
- **African American Alumni Reunion** held in conjunction with homecoming attracted over 250 alumni and students to the various events.
- **Alumni Grove** was dedicated homecoming weekend with nearly 100 people in attendance. Twelve trees have been sold and placed in the ground around the Alumni Tower. All funds from the Grove benefit student scholarships.
- **The Social Work Alumni Society** has endowed their scholarship after a successful year of fundraising.
- **The Annual Scholarship Campaign** has kicked off for the Association and so far we've raised over \$7,000 cash towards scholarships. The campaign runs through the end of the year.
- **The Annual Golf Outing** which was held in August netted over \$20,000 for the Legacy Scholarship.
- **The Student Alumni Association** held the "Nearly Naked Mile" and had over 130 students participate. Clothes from the event benefitted local charities.

**Upcoming Wright State Alumni Events**

- Nov 13 - Washington D.C. Tailgate before the Georgetown Game
- Nov 15 - Recruit Ohio, Alumni Career Fair in Columbus
- Nov 16 - Chicago DePaul Basketball Game and Reception
- Dec 1-9 - Alumni Tour to Cuba
- Dec 7 - ArtsFair
- Dec 12-15 - Madrigal Dinner
- Jan 17 - Beer Tasting
- Jan 25-Feb 4 - Alumni tour to Tahiti
- March 1 - College Outstanding Alumni Awards
- March 1 - Rowdy Gras

**Advancement Committee Report  
Wright State University Foundation Report  
November 2013**

Market returns during the first quarter of the Foundation’s fiscal year were positive and equal or exceeded associated benchmarks. After slight losses in August wiped out slight gains in July, September returns powered our portfolios to solid returns. The endowment portfolio returned 3.6% for the first quarter, besting its benchmark by twenty basis points. Our restricted portfolio also performed well, returning 3.0% for the quarter and equaling its benchmark. Equity returns led the way at +8.5%, with both domestic and world (ex-US) providing strong returns (+7.9% and 9.6%, respectively). The Foundation’s investment in private equity also provided a positive return of 4.2% for the quarter. These returns resulted in total earnings of \$3.2 million for the quarter raising our ending investment value to a little over \$111.5 million.

At its last meeting of the previous fiscal year, the Foundation’s Investment Committee expressed a concern with our current allocation formulas given changing market conditions and, most especially, our fixed income exposure. Our investment manager came back to the committee with several proposed adjustments to our allocation with three principal objectives: reducing equity volatility, shortening the duration of the fixed income allocation and increasing portfolio diversity. The Investment Committee approved several of the specific recommendations and will be meeting in special session on November 12, 2013, to further discuss those proposals that have not yet been implemented.

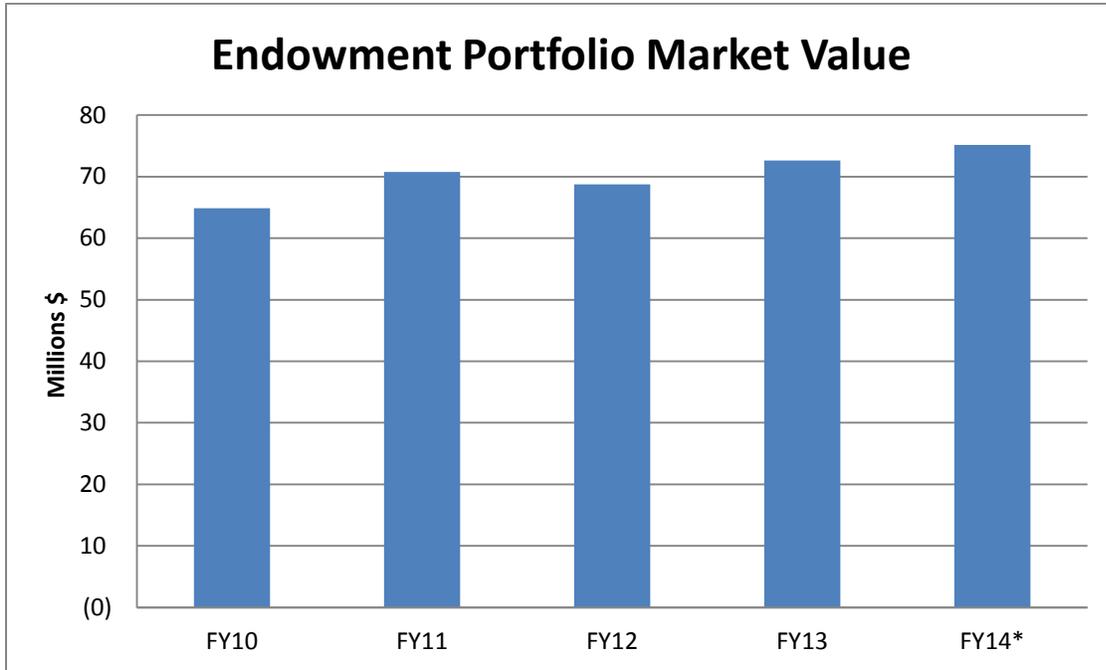
The Foundation has completed Phase I of its renovation of the office building at 3070 Presidential Drive and the Advancement Division now occupies the first and third floors of the building. Phase II renovations of the second floor continue, with occupancy by several University offices expected before calendar year-end.

The Foundation’s current endowment target allocation, actual allocation and market values as of September 30, 2013, are presented below:

**Endowment Portfolio Composition**

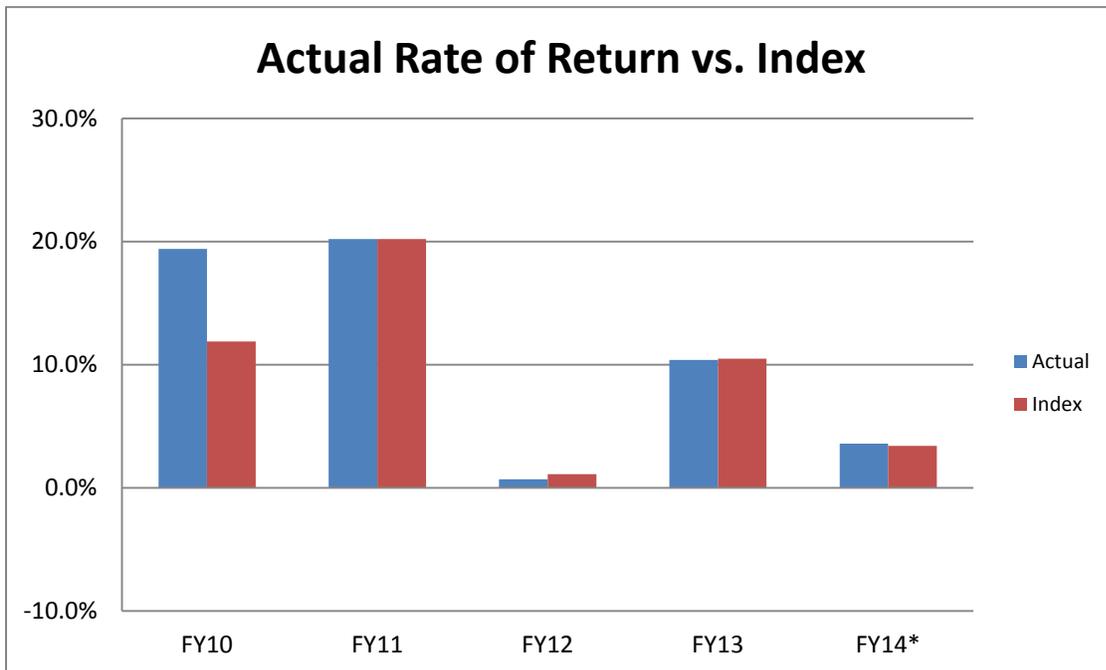
<b>Asset Class</b>	<b>Target Allocation</b>	<b>Actual Allocation</b>	<b>Market Value September 30, 2013</b>
Equity	46%	54%	\$40,321,846
Fixed income	30%	27%	20,655,668
Hedge funds	13%	13%	9,519,673
Private equity	8%	3%	2,024,336
Structured credit	3%	3%	2,617,251
Cash & equivalents	0%	0%	3,362
<b>Totals</b>	<b>100%</b>	<b>100%</b>	<b>\$75,142,136</b>

**Endowment Value**



\*To September 30, 2013

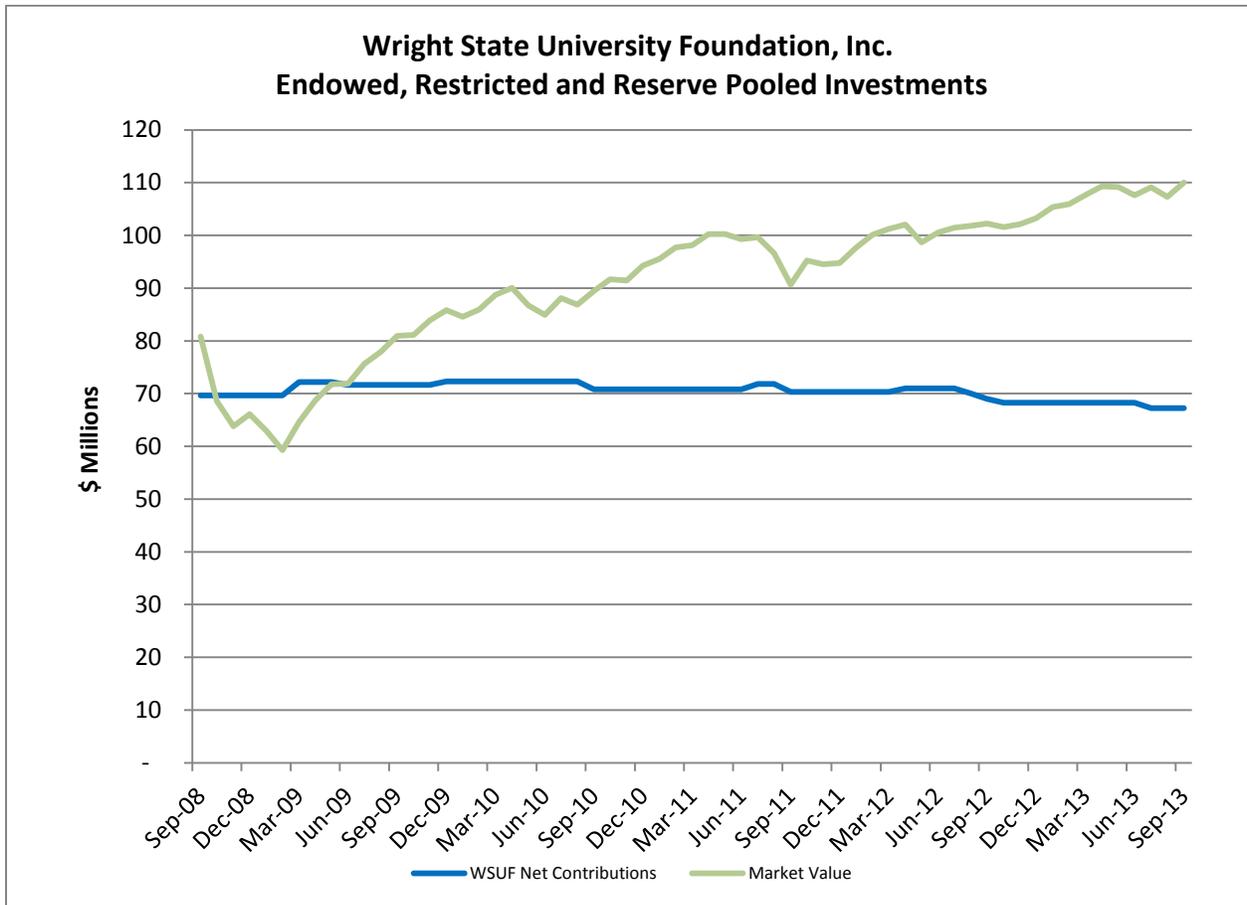
**Endowment Historical Rates of Return**



\*To September 30, 2013

Current index composed of Russell 1000 (20.2%), Barclays US Aggregate Index (15.0%), MCSI All Country World Ex US Index (13.5%), Barclays Capital 1-5 Yr US TIPS Index (14.1%), HFR FOF Diversified (14.1%), Russell 2000 (5.8%), 50% S&P 500/50% Barclays 10 Yr Trea BW (3.9%), BOFA ML US HY Master II Index (3.9%), JPM EMBI Global Diversified (2.9%), DJ Wilshire Resi (3.3%), SOF Structured Credit Fund (3.3%).

**All Portfolios Value vs. Contributions**



**Advancement Committee Report  
Development Report  
November 2013**

Planned Giving Update

As of November 14, there are 15 planned gifts in discussion with a known or estimated value of \$10.5 million. There are 19 additional possible planned gifts in the early stages of discussion (with gift values yet to be determined).

Annual Giving Update

Phonathon

The Fall Phonathon Campaign concluded on October 23 and raised \$221,840 (including gifts, pledges, and matching gifts). This is already an increase from last year's total of \$146,000. This effort acquired 1,233 new donors (734 of which came from parents of current students). The Spring Phonathon Campaign will run from February 15 to April 9, 2014. The goal is to raise \$395,000 (both spring and Fall Campaigns) by April 9.

Direct Mail

The FY14 fall appeal, segmented by College, is in progress with mailings having gone out in early November. This year a new segment for the Wright State Graduate School was added. Special mailings are also going out for Sociology/Anthropology and the Alumni Association Scholarship.

Student Discovery Initiative

The Offices of Annual Giving, Alumni Relations, and Advancement Research and Prospect Management have partnered with Student Affairs to develop this initiative where President's Ambassadors will reach out to donor prospects on the discovery list to update contact information, build relationships, and help qualify major prospects. President's Ambassadors will be receiving their assignments during the week of November 12<sup>th</sup>.

GivingTuesday – December 3, 2014

Wright State's Advancement Office will be participating in this year's national GivingTuesday, which is a newly developed initiative geared toward non-profit organizations. Wright State will introduce a new #Fund4WrightState campaign to raise \$35,200 to provide full tuition scholarships (for 1 year) for four students.

### Campus Scholarship and Innovation Campaign (CSIC)

Gifts for the 2013 CSIC will continue to be counted through December 31. On December 6, we will host the 2<sup>nd</sup> annual President's Club reception for faculty, staff, and retiree donors who gave \$1,000 or more during the 2013 CSIC. The 2014 CSIC will kick off on March 3.

**Advancement Committee Report**  
**The Campaign for Wright State University**  
**November 2013**  
 (data reported from 9/30/13)

**Comprehensive Campaign Activity**

- Gifts and pledges of \$81,536,224 have been accepted. This total includes a \$1.25MM gift in process awaiting a gift agreement signature by the donor.
- Tracking of the four donor classifications includes these totals:

Alumni	\$15,167,042*	18.9%
Friends	\$21,457,418	26.7%
Corporations	\$37,259,334	46.4%
Foundations	\$ 6,402,429	8.0%

*(\* \$1MM gift in process will be included in the alumni category)*

- Gifts have been committed in these 4 areas:

Academic Support	\$33,851,113	97% of goal
Facility Support	\$ 8,437,991*	34% of goal
Scholarships	\$22,140,715	30% of goal
University-wide	\$15,856,404	106% of goal

*(\* \$1.25MM gift in process will be counted in the facility category)*

- Moving toward the FY '14 public phase of the campaign a rebalancing of the funding priorities will be undertaken. For example a new category may be introduced to seek endowed chairs and professorships as part of the academic excellence initiative.
- The next meeting of the National Campaign Cabinet is scheduled for Monday, November 18, 2013. It will be held in the University Libraries and focus on the Archives. The session will be led by Distinguished Honorary Chair, Amanda Wright Lane.

**College/School/Unit Campaign Goals**

Each of the academic units is preparing for their campaign role by creating the following. Meetings to present campaign goals have been underway with the Provost.

- √ Fundraising goal
- √ Fundraising objectives
- √ Seating or revising Advisory Board for campaign responsibilities

### **Campaign Collateral Materials**

- *Changing Lives* is no longer being used as the campaign theme
- A campaign communications consultant has been selected to prepare these materials:
  - Campaign brand
  - Prospectus/case for support
  - Individual case statements for colleges/schools
  - Campaign video
  - Campaign social media
  - Campaign website
  - Business products (pledge forms, gift acceptance policies, investment performance statements, business cards and stationery)

### **Public Launch—Fall 2014**

- Working to secure Mr. Tom Hanks for the event. We are holding 3 dates (1 in October, 2 in November, 2014). Working with his office directly and his agent.
- Will announce \$100 million raised.
- Opportunity to honor and acknowledge the donors who made it possible for us to celebrate \$100 million, and motivate those who will help us exceed our working goal of \$150 million.
- Black tie upscale event with 600 guests at the Nutter Center.