

**WRIGHT STATE UNIVERSITY
BOARD OF TRUSTEES**

**Advancement Committee Report
January 2014**

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

Alumni Relations Report

January 2014

2013 Recap

- We engaged 7,672 alumni in events.
 - That was over 1,000 more than 2012.
 - Over 400 of those alumni were first time event attendees.
 - Over 600 were graduating students and young alumni.
 - Nearly 1,000 alumni attended our various educational events.
- Total engagement (events, social media, donors, etc.) of alumni topped 20,000.
- Total fundraising for Association scholarships more than doubled from 2012.
 - Alumni now represent over 18% of total campaign giving compared to 5% in the last campaign.
 - In the last three years, Association related scholarships have grown over 50%.
 - Last year was the largest number of scholarships we have ever given with a total of 69.

Past Quarter Recap

- **iModules Transition**
 - All back end processes from event registration and membership processing to data management and email marketing was transitioned to a new and more robust platform.
- **African American Alumni Society**
 - Held their annual meeting with 30+ attendees and transitioned officers in early January.
- **Cincinnati Alumni Network**
 - Transitioned officers in early January
- **Cleveland Alumni Network Scholarship**
 - Cleveland Alumni Network will be developing their own scholarship to benefit Cleveland area college age students
- **Cleveland Alumni Network hosted annual Wright State vs. Cleveland State tailgate**
 - Nearly 35 alumni and guests in attendance
- **Dayton Alumni Network**
 - Transitioned officers in early January
 - During the holiday supported two local charities for the holidays
 - For the Love of Children
 - Greene County Children Services
 - During the month of January the network is conducting a raffle at home basketball games for a game day experience that benefits Coaches vs. Cancer and Wright State University Food Pantry
 - Conducted a 50/50 at the WSU Alumni Association Beer Tasting on Friday, January 17 in support of the WSU Alumni Association Legacy Scholarship

- **DC Alumni Event**
 - Wright State vs. Georgetown University tailgate in DC. Over 50 alumni and friends in attendance with Dr. & Mrs. Hopkins.
- **Tampa Alumni Network**
 - Sunday, November 17 Tampa Alumni Network hosted an art and dinner experience at Dali Museum, nearly 20 alumni and guests in attendance
- **Major transition**
 - Proposals for the model of alumni relations will be considered at February 1st Association board meeting. More details forthcoming.

Upcoming Wright State Alumni Events

- Jan 25-Feb 4 - Alumni tour to Tahiti
- Feb 5 - Graduates of the Last Decade (GOLD) pre-game party
- Feb 16 - Wright State University Collegiate Chorale at Carnegie Hall
- Feb 20 - College of Nursing and Health Alumni Society Wine Tasting
- Feb 25 - Student Alumni Association Raider Spirit Rally
- Feb 25-Mar4 - Irish Splendor alumni tour
- March 1 - College Outstanding Alumni Awards
- March 1 - Rowdy Gras
- March 5 - Model UN Teaching and Learning to be Globally Aware & Engaged
- March 14 - Nonprofit Leadership Alliance Society Spring Wine Tasting
- March 20 - WSU-Miami Valley College of Nursing & Health 40th Anniversary
- April 4 - Alumni Association Wine Tasting and Theatre Event “Les Miserables”

**Advancement Committee Report
Wright State University Foundation Report
January 2014**

Market returns during the second quarter of the year continued to build on gains from the first quarter. By the end of December, our endowment portfolio had returned a positive 8.0% (benchmark data for the endowment portfolio was not available at the time this report was prepared). Equities provided the biggest boost to performance, with domestic funds slightly outperforming global investments for the period. Private equity and distressed debt investments also contributed to the positive numbers. As indicated below, the portfolio ended the second quarter with a value of \$77.3 million, up a net \$4.6 million since the beginning of the fiscal year. Actual allocations for all categories except equities were in line with targets. The over allocation to equities resulted from private equity commitments not yet called that were invested temporarily in equity funds.

The Foundation's Investment Committee met in November to continue discussions of recommendations made by our investment manager and other concerns of the group. This meeting did not result in any further changes to our asset allocation formulas, but the Committee did agree that it wanted further direction with respect to our overall allocation to stock funds, bond funds and alternative investments. Also at this meeting, the Committee was informed of the University's ITN for Investment Advisory Services. One member of the Committee and an Advancement staff member have agreed to assist in reviewing responses to the ITN.

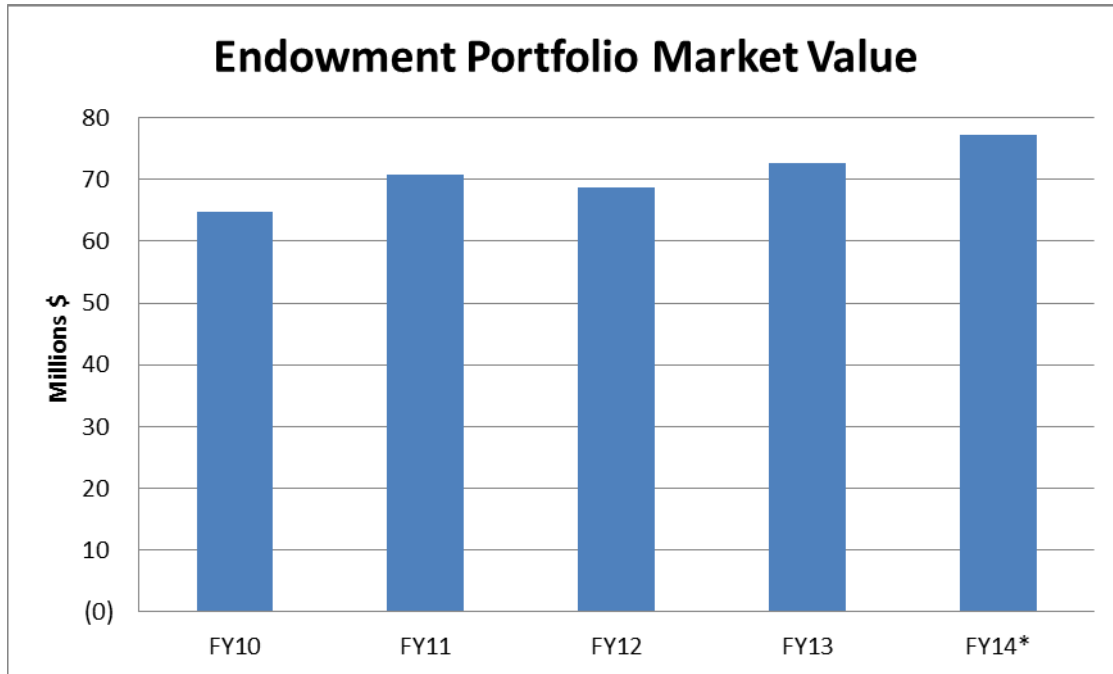
The Foundation recently completed Phase II of its renovation of the office building at 3070 Presidential Drive and several University offices have relocated to the second floor. Full occupancy of the building should be completed shortly.

The Foundation's current endowment target allocation, actual allocation and market values as of December 31, 2013, are presented below:

Endowment Portfolio Composition

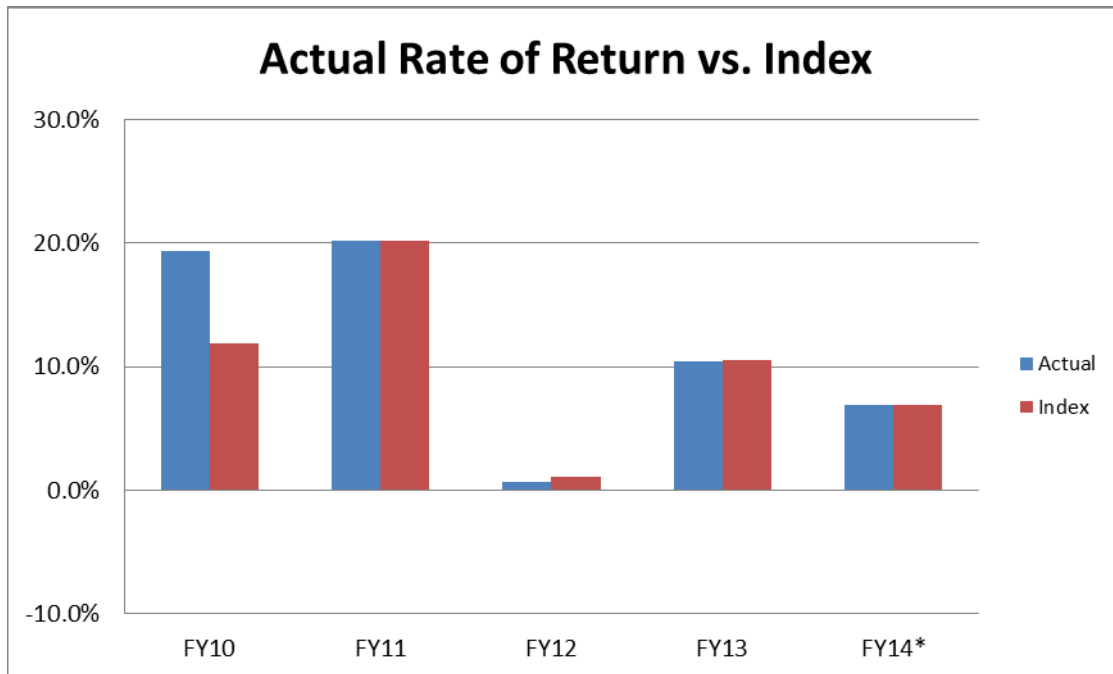
Asset Class	Target Allocation	Actual Allocation	Market Value December 31, 2013
Equity	43%	50%	\$38,899,795
Fixed income	32%	31%	23,934,541
Hedge funds	14%	13%	9,686,196
Private equity	8%	3%	2,098,924
Structured credit	3%	3%	2,631,085
Cash & equivalents	0%	0%	2,614
Totals	100%	100%	\$77,253,155

Endowment Value



*To December 31, 2013

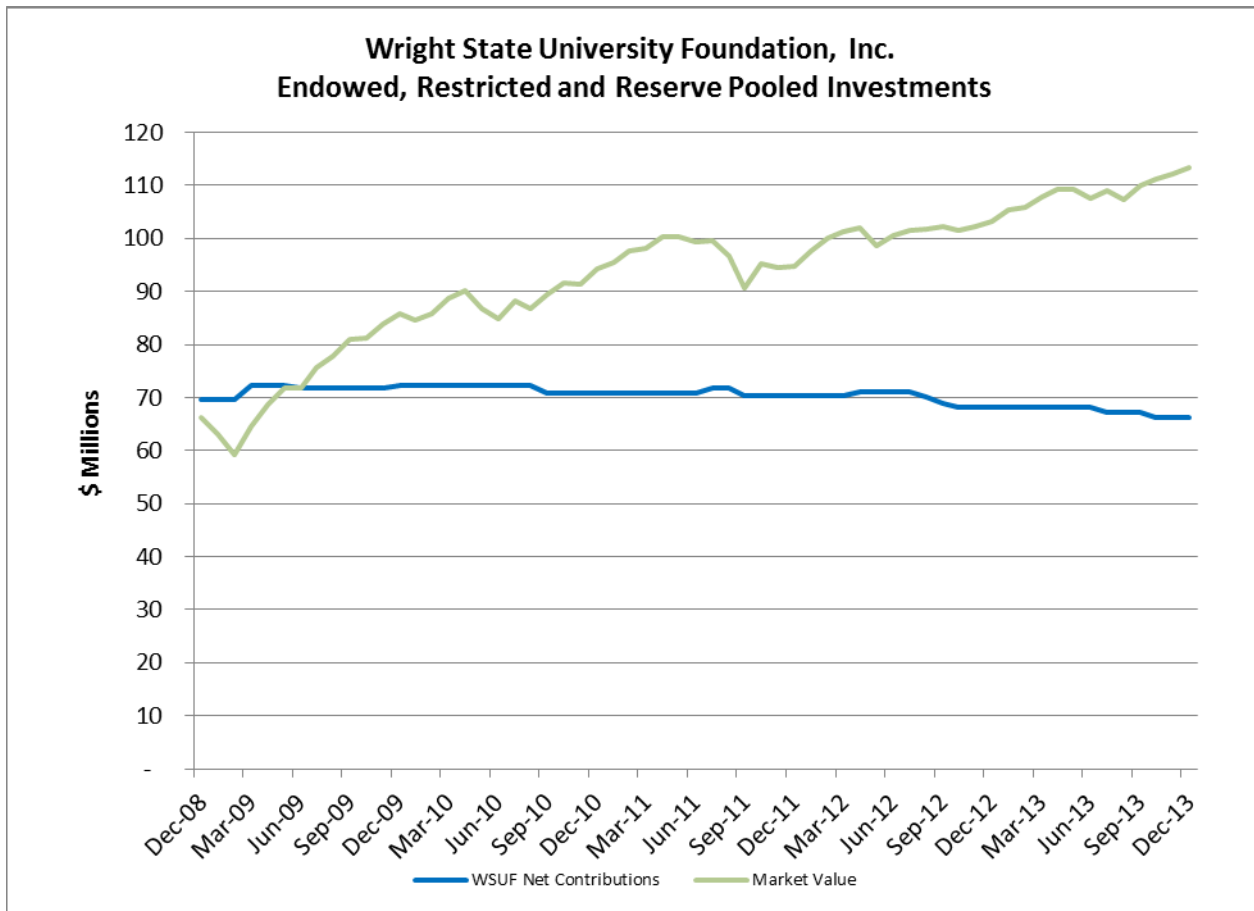
Endowment Historical Rates of Return



*To November 30, 2013 (most recent data available)

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



WRIGHT STATE UNIVERSITY FOUNDATION, INC.
Fiscal Year 2014 to Date through December 31, 2013

FISCAL-YEAR-TO-DATE

GIFT SOURCE	FY2014	
	DONORS	DOLLARS
Alumni	2,197	\$528,930
Corporations	191	1,793,711
Foundations and Organizations	63	824,915
Friends	1,798	1,063,725
<i>SUBTOTAL CASH RECEIPTS</i>	<i>4,249</i>	<i>\$4,211,281</i>
Gifts-in-kind	16	2,234,273
<i>TOTAL RECEIPTS</i>	<i>4,265</i>	<i>\$6,445,554</i>

FISCAL-YEAR-TO-DATE

GIFT SOURCE	FY2013	
	DONORS	DOLLARS
Alumni	2,084	\$755,774
Corporations	188	1,442,786
Foundations and Organizations	55	548,372
Friends	1,277	637,414
<i>SUBTOTAL CASH RECEIPTS</i>	<i>3,604</i>	<i>\$3,384,346</i>
Gifts-in-kind	40	27,090
<i>TOTAL RECEIPTS</i>	<i>3,644</i>	<i>\$3,411,436</i>

FISCAL-YEAR-TO-DATE

GIFT SOURCE	PCT. CHANGE	
	DONORS	DOLLARS
Alumni	5%	-30%
Corporations	2%	24%
Foundations and Organizations	15%	50%
Friends	41%	67%
<i>SUBTOTAL CASH RECEIPTS</i>	<i>18%</i>	<i>24%</i>
Gifts-in-kind	-60%	8148%
<i>TOTAL RECEIPTS</i>	<i>17%</i>	<i>89%</i>

WRIGHT STATE UNIVERSITY FOUNDATION, INC.

Report of Fundraising Totals By Source and Unit

Fiscal Year-to-Date to December 31, 2013

(including totals from prior fiscal year)

BY SOURCE

SOURCE	CASH ¹	PLEDGES ²	IRREVOCABLE DEFERRED GIFTS ³	GIFTS OF PROPERTY ⁴	REVOCABLE DEFERRED GIFTS ⁵	CURRENT FYTD	PRIOR FYTD
						TOTALS	TOTALS
Alumni	\$357,315	\$408,627	\$0	\$25,708	\$1,795,000	\$2,586,650	\$2,693,944
Corporations	505,515	0	0	2,101,995	0	2,607,510	818,853
Foundations and Organizations	742,815	24,000	0	57,866	0	824,681	419,746
Friends	659,022	110,161	50,000	48,704	4,570,778	5,438,665	854,094
CURRENT FYTD TOTALS	\$2,264,667	\$542,788	\$50,000	\$2,234,273	\$6,365,778	\$11,457,506	
PRIOR FYTD TOTALS	\$2,110,441	\$959,106	\$100,000	\$27,090	\$1,590,000		\$4,786,637
% CHANGE FROM PRIOR FISCAL YEAR	7.3%	-43.4%	-50.0%	8147.6%	300.4%	139.4%	

BY UNIT

UNIT	CASH ¹	PLEDGES ²	IRREVOCABLE DEFERRED GIFTS ³	GIFTS OF PROPERTY ⁴	REVOCABLE DEFERRED GIFTS ⁵	CURRENT FYTD	PRIOR FYTD
						TOTALS	TOTALS
Boonshoft School of Medicine	\$370,451	\$122,931	\$0	\$2,125,000	\$0	\$2,618,382	\$318,028
College of Education & Human Services	101,345	13,117	0	0	10,000	124,462	84,094
College of Engineering & Computer Science	181,687	11,930	0	0	0	193,617	198,474
College of Liberal Arts	166,579	165,101	0	86,394	272,500	690,574	514,456
College of Nursing & Health	324,031	6,210	0	0	0	330,241	199,723
College of Science & Math	43,964	6,815	0	0	0	50,779	256,679
Curriculum & Instruction	8,602	3,203	0	1,340	0	13,145	7,839
Enrollment Management	31,578	530	0	0	0	32,108	243,831
Intercollegiate Athletics	320,385	17,999	0	0	260,778	599,162	2,153,362
Lake Campus	118,909	2,185	0	0	0	121,094	153,982
Other	435,294	168,159	0	345	5,822,500	6,426,298	291,176
Raj Soin College of Business	88,404	20,028	0	0	0	108,432	155,018
School of Professional Psychology	6,584	2,725	0	0	0	9,309	16,203
Student Affairs	55,901	1,380	50,000	2,744	0	110,025	78,187
University College	115	50	0	0	0	165	75
University Libraries	10,838	425	0	18,450	0	29,713	115,510
CURRENT FYTD TOTALS	\$2,264,667	\$542,788	\$50,000	\$2,234,273	\$6,365,778	\$11,457,506	
PRIOR FYTD TOTALS	\$2,110,441	\$959,106	\$100,000	\$27,090	\$1,590,000		\$4,786,637
% CHANGE FROM PRIOR FISCAL YEAR	7.3%	-43.4%	-50.0%	8147.6%	300.4%	139.4%	

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.

**Advancement Committee Report
Development Report
January 2014**

Planned Giving Update

FY14 Mid-Year Results (July 1-December 31, 2013):

Nine new planned gifts with total known value \$6,415,778. All were bequest intentions or beneficiary designations. Among the nine planned gifts was one more \$1 million+ bequest intention from a Wright State alumnus and one with a value of \$4.3 million.

As of 12/31/13, there are 12 planned gifts in discussion with a known or estimated value of \$4,145,000. There are 18 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/eSolicitations

The FY14 Raider Club athletics appeal has raised \$36,555. This is a 66% increase over last year's appeal which raised \$21,957.

The FY14 fall appeal has raised \$30,911 (as of the 90-day check point) toward scholarships and programs that support the colleges. This is slightly lower than the 90-day check point in FY13, however, coming off a successful phonathon campaign, this is not unusual. In addition to the \$30,911 raised, many other individuals utilized their fall appeal mailing to fulfil their phonathon pledges.

The FY14 End of Year eSolicitation went out earlier this year and brought back \$7,045, which is a 48% increase over the FY13 End of Year eSolicitation.

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 have received their assignments and are attempting to schedule visits.

GivingTuesday

Wright State's Advancement Office participated in the National Giving Tuesday festivities on December 3 to raise awareness on the importance of philanthropy, and the impact contributions to Wright State have on our students. Approximately 150 students attended the event. A follow-up blitz campaign will take place during this year's April Craze to encourage student organizations to raise funds for a new "Fund4WrightState" designation that's designed to raise enough money to provide a year tuition for 4 eligible students.

Campus Scholarship and Innovation Campaign (CSIC)

The 2013 CSIC raised \$710,776.81 toward scholarships and programs. We reached 54% participation from full-time faculty and staff. The 2014 CSIC theme is "Destination: Wright State" and materials will be distributed on March 3. A campaign kick-off is planned for February 28. For the first time this year, there will be an early-bird CSIC email solicitation that will be sent to faculty/staff prior to the campaign kick-off so that people who do not wish to receive CSIC materials can make their gift early.

**Advancement Committee Report
The Campaign for Wright State University
January 2014
(data reported from 12/31/13)**

Comprehensive Campaign Activity

- Gifts and pledges of **\$90,290,450** have been accepted.
- Tracking of the four donor classifications includes these totals:

Alumni	\$17,033,953	18.9%
Friends	\$26,653,640	29.5%
Corporations	\$39,578,759	43.8%
Foundations	\$ 7,024,096	7.8%

- Gifts have been committed in these 4 areas:

Academic Support	\$41,245,957	118% of goal
Facility Support	\$ 9,688,991	39% of goal
Scholarships	\$23,169,176	31% of goal
University-wide	\$16,186,324	108% of goal

- The next meeting of the National Campaign Cabinet is scheduled for Friday, April 11, 2014. This meeting will focus on the Boonshoft School of Medicine and highlight education, research and service. Additionally cabinet members will be invited to attend the Creative Arts Center groundbreaking, and to attend ArtsGala on the evening of Saturday, April 12th.

College/School/Unit Campaign Goals

Each of the college/school/campus deans and their respective development professionals met with Provost Narayanan and/or President Hopkins during the fall. They reviewed their proposed campaign goals, lead prospective donors, campaign advisory board composition, and campaign strategies.

Campaign Collateral Materials

- Snavelly Associates has been retained to prepare the campaign messaging for the public launch in the fall of 2014.

- Campaign theme
- 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

- The campaign is on track with proposals pending to be at a minimum of \$100 million raised by 7/1/2014.
- Internal committees charged with designing and implementing various aspects of the campaign launch are currently being seated. These campaign committees include the following:
 - Launch event (October/November)
 - Communications/media coverage
 - Regional Events (two years of national travel in 12 key geographies)
 - Entertainment
 - Gift recognition

Advancement Committee Report Communications & Marketing Report January 2014

Highlights, November 1--January 15

Over 100 campus partners and vendors attended our November 6 Open House in our new location in the Wright State Research Institute building (4035 Col. Glenn Hwy., Suite 300). Numerous projects were on display and we demonstrated Skype meetings, so our campus partners can meet with us without having to leave their offices.

Print

Seventy-two print projects were completed, promoting university programs and events.

Web

Five websites went live during this period:

Combined Campaign

<http://www.wright.edu/combined-campaign>

- A new site for United Way and Culture Works with a combined progress meter on the homepage.

College of Liberal Arts

<http://liberal-arts.wright.edu/>

- A complete redesign of the entire COLA web presence, unifying sites that used to be scattered across many different URL's.
- The new site utilizes standard URL structures for all sections of the site, improving user experience and search engine optimization.
- The new site specifically focuses on prospective and current students.
- All 24 academic and functional COLA departments were redesigned and rebuilt in the process.
- All departments rewrote their content and organized to the new standards that are consistent across the college.
- All departments follow a single college design while still allowing for individuality at the department level.
- There are over 14,000 pieces of content on the new site.
- COLA was the first site in which we integrated the new people.wright.edu site that allows faculty and staff to maintain their own personal content without needing to learn HTML, CSS, sFTP, etc. to update the content.
- people.wright.edu person lists are then embedded into the college site and are updated for title, phone, address, department and name changes directly by HR in Banner to ensure all people information is current and accurate.
- This is an example of a person list embedded in COLA <http://liberal-arts.wright.edu/music/people>

International Gateway

<http://www.wright.edu/international-gateway>

- A new single, top-level destination for admissions for international students.

Admissions Homepage

<http://www.wright.edu/admissions-offices>

- The goal was to simplify and reduce the number of clicks needed to access the many admissions offices.
- Content was condensed and simplified to make a single page for all admissions offices at Wright State.
- This page's content used to be split across seven different pages.
- Special attention was invested to ensure this page was considerably more user friendly on all handheld devices.

Lake Regional Summit

<http://www.wright.edu/lake/regionalsummit/>

- Content was updated for the upcoming regional summit including a new graphic for the Lake Campus homepage.

Advertising

Outdoor: The current campaign was developed to create top-of-mind awareness and name recognition for the university in the greater Dayton and surrounding metro area. The use of hashtag symbol (#) followed by braggingWrights and popularized by Twitter account users is being utilized in the outdoor billboard campaign. A #50 showing was purchased, which means that 50% of the total population in the Dayton area will pass by the selected locations on a daily basis.

Television: A package of ESPN-TV Network spots was purchased within nationally televised Wright State University basketball games.

Wright State@Georgetown--Nov. 13

Wright State@Valparaiso--Jan. 10

Green Bay@Wright State--Jan. 17

Detroit@Wright State--Feb. 21

Online video

The university holiday video was created with a Wright State rewrite of *The Night Before Christmas*, with President Hopkins in the starring role. The video serves as the university holiday "card" and was sent to faculty, staff, students, alumni and friends.

Six other online videos were produced to accompany newsroom stories.

Media relations

The media team wrote 96 articles for the WSU Newsroom.

Social engagement 2013 highlights

--The only university in the country to win the large division of the *Business Journal's* Social Media Madness competition

--78,565 total followers

--37,263 link click thrus from social media channels

--Launched Social Media Managers Group. This group consists of 108 faculty, staff, and student social media leaders, representing 80 departments, units, groups and colleges, all working together to promote the university through social engagement.

As of January 15:

Facebook: 16,217 fans
LinkedIn: 5,684 company followers
48,394 education followers
Twitter: 4,593 @WrightState followers
2,876 @WrightStateNews followers
1,486 @PresidentDHOP followers
YouTube: 286 subscribers
Google+: 347 followers

Klout scores (measures online influence. An average Klout score is 20):

66 Wright State
49 President Hopkins