

**WRIGHT STATE UNIVERSITY
BOARD OF TRUSTEES**

**Advancement Committee Report
November 2018**

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 2018**

Updates:

flight

A PUBLICATION FOR ALUMNI AND FRIENDS OF WRIGHT STATE UNIVERSITY

Wright State University's Office of Marketing used to produce two issues of the *Wright State University Magazine* each year. The magazines were mailed to 90,000 alumni and friends of the university, plus to on-campus faculty and staff. The total cost for printing and mailing each issue was roughly \$65,000.

In late spring of FY17, it was determined that the budget would only allow the printing and mailing of one final issue (the 50th issue, mailed in September, 2017), therefore, the magazine would have ceased production.

The Office of Alumni Relations and the Office of Annual Giving saw this as a huge problem within its communications strategy and focus. This would mean that the only mail alumni would receive from the university in FY18, and going forward would be appeals for donations, and possibly event postcards, dependent on their geographic area.

Communication to our alumni is a vital part of our alumni engagement strategy and this sudden change would have a tangible impact on our current mission as an Alumni Association and affect possible future alumni donations and engagement.

Therefore, in the fall of 2018, with the support of the Wright State University Foundation, Wright State Alumni Association, as well as other internal partners to include Donor Relations, Annual Giving, and Alumni Relations, we published a new magazine for alumni and friends called *flight*. Some features of the first issue included:

- 44 pages, featuring alumni content, donor stories, event highlights, stories about students on campus, alumni success stories, etc.
- Sent to a smaller 40K list of donors and our most engaged alumni
- A remit envelope/insert to mail checks or credit card payment donations
- Advertisements for ongoing projects important to the Office of Annual Giving, University Advancement and Alumni Relations (such as Archives Project)

The issue, so far, has produced 26 donors and raised more than \$3,300. Another issue is currently being planned to mail in mid-March 2019.

Event Recaps:

Homecoming Trivia Night

This year's homecoming trivia night was another great success thanks to the efforts of the Homecoming Trivia Night Committee. We had 16 teams of 8 competing for the coveted bragging rights and all proceeds raised go to support student scholarships in the College of Education & Human Services. At the end of the event, we raised over \$1,000 for student scholarships.

Alumni Association Scholarship Brunch

Another successful event recognizing the success of the Alumni Association's Scholarship Recipients. The brunch included special remarks from Provost Edwards and Dyamin Baker, an Alumni Association Legacy Scholarship Recipient. In addition, we recognized the new installation of benches, trees, and bricks for Alumni Grove. This year alone, the Alumni Association awarded \$43,829 in scholarships to a total of 35 students.

Leadership Launch

An annual tradition during homecoming weekend, Leadership Launch is the annual student and alumni mixer for the Office of Leadership Studies. This year, there were over 120 students and alumni in attendance, along with employers from the region who hire and support our Organizational Leadership students.

Homecoming Festival

We had over 450 alumni and students come out for the live music, chili cook-off, food trucks, and lots of activities that included cheering on the Raiders in club football, women's soccer, and men's soccer.

Upcoming Events

Alumni Service Day

The Alumni Association's 2nd annual service day is on Saturday, November 10th. After an overwhelming success last year, the Association set a goal to double the number of attendees to participate at 150. The Association has partnered with 12 local non-profit organizations to provide enough volunteer opportunities on this day. We currently have 147 registered attendees and believe we will meet our 150 person goal. All participants will receive an Alumni Association t-shirt and celebrate together during a lunch and happy hour at Dayton Beer Co. immediately following the service activities.

December 1	Chicago Holiday Bus Tour – SOLD OUT
December 13	Winter Welcome for December Graduates
January 12	African American Alumni Society Annual Meeting
January 26	Annual Beer Tasting following the Men's basketball game
February 15	Alumni Murder Mystery Dinner Train – Tampa
March 2	Rowdy Gras
April 5	Amigos LatinX Gala
April 13	ARTSGALA

May 18-19	Annual Wine Bus Tour
June 8	Wright State Day at the Dayton Dragons
June 29	Cincinnati Reds Trip
July 21	Wright State Day at Kings Island
August 2	Alumni Association Annual Legacy Golf Outing
September 14-15	Annual Bourbon Bus Tour
October 4-5	Homecoming

**Advancement Committee Report
Wright State University Foundation Report
November 2018**

The financial markets continued their upward climb during the first quarter of the new fiscal year. As indicated below, our endowment portfolio finished the month with a market value of \$87.4 million, up \$2.6 million or 3.1% for the quarter. July was the strongest performing month, but both August and September also provided net positive returns. Excluding private equity returns, the portfolio returned 2.52% against a benchmark return of 2.78%. US equities continued to be the largest contributor to positive results with a 3-month return of 6.72%. Large cap securities outperformed small cap, +7.38% to +5.08%. Global equities also provided strong results with a quarterly return of 5.52%. Foreign equity returns on the other hand detracted from the overall return with a loss in value of 0.37%, one of only two asset classes taking a loss during the quarter. Fixed income securities provided a weak overall positive return of 0.68%, which included the other class to suffer a loss, emerging markets debt (-0.35%). Our multi-asset strategies also performed well returning 4.22%. Alternative investments other than private equity also finished up, contributing 1.60% to the portfolio's overall return. At September 30, 2018 the portfolio's one-, three-, five-, and ten-year returns were 5.80%, 8.11%, 5.80% and 6.49%, respectively. Asset allocations at the end of September were in line with our investment policy, with actual allocations as follows: 44% equities, 23% fixed income, 13% multi-asset, and 20% alternatives.

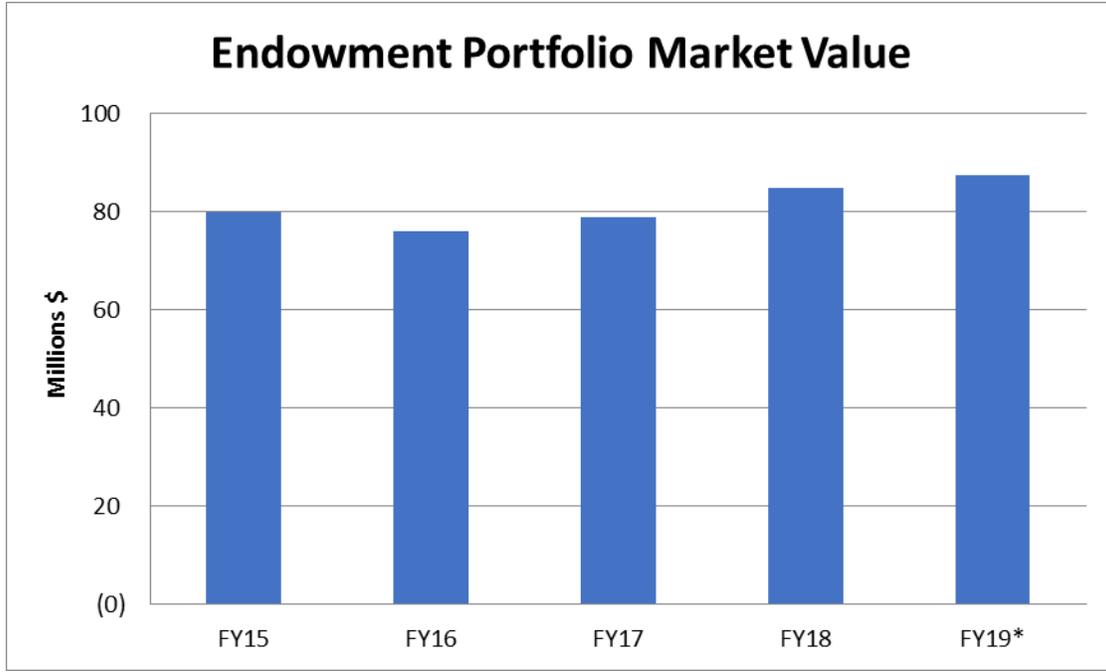
Due to positive investments results and controlled spending, the Foundation's gross reserve increased by 15.9% during the quarter, to end at \$10.1 million. Although this is believed to be the highest level ever reached, the realities of steep October market declines and the Foundation's heavy reliance on investment earnings, will quickly drive our reserve to more moderate levels next quarter.

The Foundation's current endowment portfolio composition, including target allocations, actual allocations, and market values, as of September 30, 2018, is presented below:

Endowment Portfolio Composition

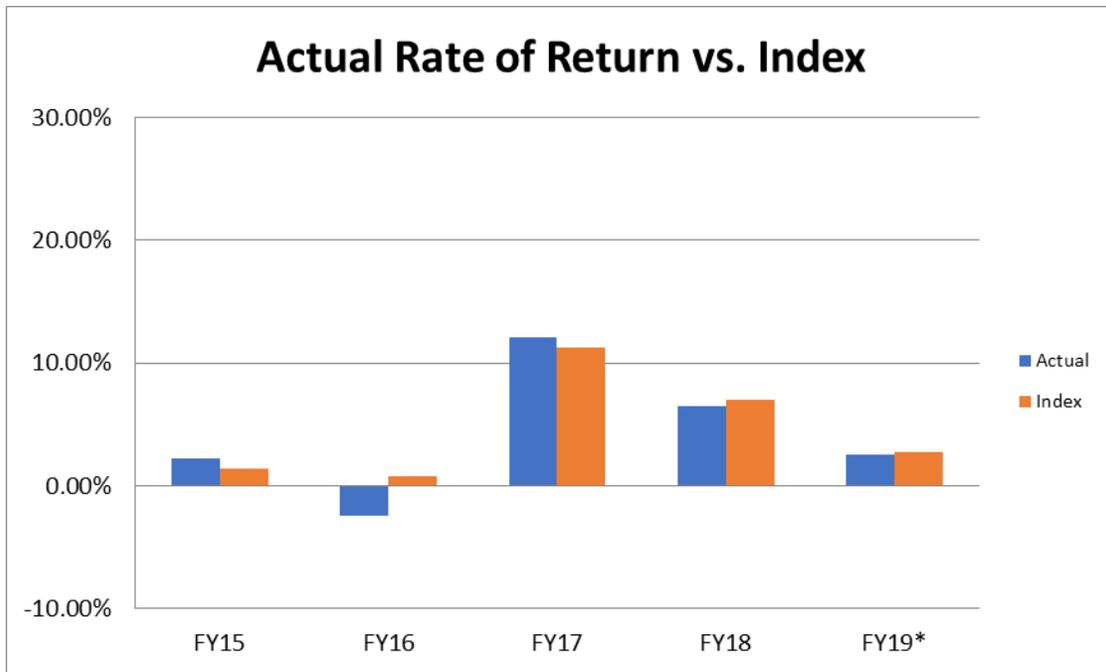
<u>Asset Class</u>	<u>Target Allocation</u>	<u>Actual Allocation</u>	<u>Market Value September 30, 2018</u>
Equity	42%	44%	\$38,345,922
Fixed income	24%	23%	20,062,849
Multi-asset	14%	13%	11,673,442
Hedge funds	8%	8%	6,837,786
Private equity	8%	7%	6,468,018
Energy Debt	4%	5%	4,043,548
Cash & equivalents	0%	0%	0
Totals	100%	100%	\$87,431,565

Endowment Value



* Through September 30, 2018

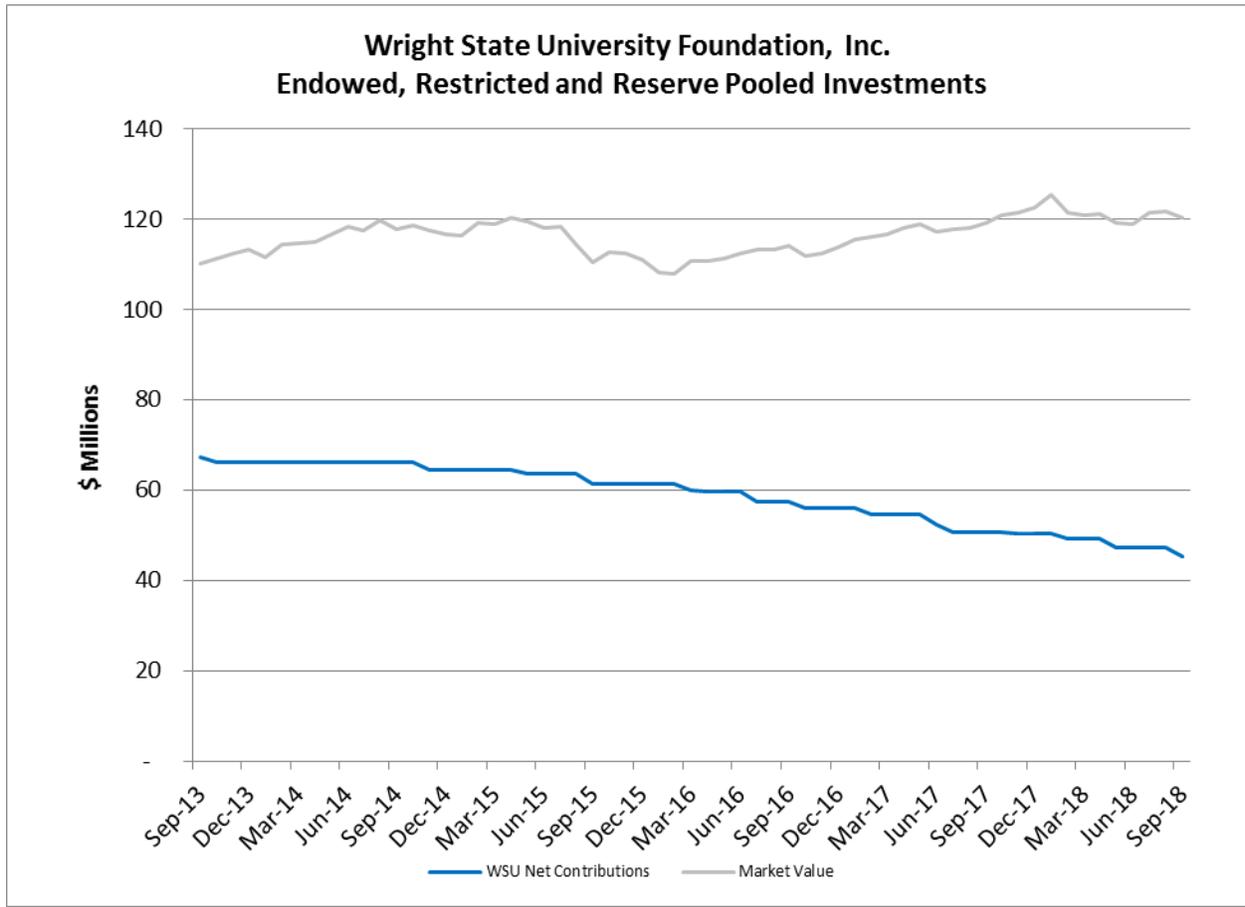
Endowment Historical Rates of Return



* Through September 30, 2018

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, 2018

(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	\$66,400	\$27,910	\$0	\$16,306	\$170,000	\$280,616	\$131,207
Corporations	256,986	0	0	50	0	257,036	358,537
Foundations and Organizations	115,261	0	0	20	0	115,281	71,483
Friends	148,920	4,600	10,000	18,000	500,000	681,520	136,174
CURRENT FYTD TOTALS	\$587,567	\$32,510	\$10,000	\$34,376	\$670,000	\$1,334,453	
PRIOR FYTD TOTALS	\$617,581	\$40,180	\$0	\$28,441	\$11,198		\$697,401
% CHANGE FROM PRIOR FISCAL YEAR	-4.9%	-19.1%	N/A	20.9%	5883.2%	91.3%	

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	\$79,918	\$300	\$0	\$50	\$0	\$80,268	\$59,996
College of Education & Human Services	23,238	2,485	0	0	0	25,723	6,525
College of Engineering & Computer Science	54,855	1,325	0	0	0	56,180	41,081
College of Liberal Arts	73,340	4,624	0	18,000	500,000	595,964	67,617
College of Nursing & Health	48,505	265	0	0	170,000	218,770	51,248
College of Science & Math	48,800	1,495	0	0	0	50,295	85,414
Curriculum & Instruction	16,530	525	0	0	0	17,055	31,554
Enrollment Management	3,450	0	0	0	0	3,450	4,057
Intercollegiate Athletics	37,312	1,750	0	16,306	0	55,368	149,307
Lake Campus	75	0	0	0	0	75	300
Other	67,084	6,306	0	0	0	73,390	70,781
Raj Soin College of Business	67,418	3,305	0	0	0	70,723	21,441
School of Professional Psychology	1,000	0	0	0	0	1,000	5,800
Student Affairs	44,323	130	0	20	0	44,473	85,115
University College	0	0	0	0	0	0	0
University Libraries	21,719	10,000	10,000	0	0	41,719	17,165
CURRENT FYTD TOTALS	\$587,567	\$32,510	\$10,000	\$34,376	\$670,000	\$1,334,453	
PRIOR FYTD TOTALS	\$617,581	\$40,180	\$0	\$28,441	\$11,198		\$697,401
% CHANGE FROM PRIOR FISCAL YEAR	-4.9%	-19.1%	N/A	20.9%	5883.2%	91.3%	

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, 2018 and 2017**

MONTH-TO-DATE

GIFT SOURCE	SEP 2018		SEP 2017		PCT. CHANGE	
	DONORS	DOLLARS	DONORS	DOLLARS	DONORS	DOLLARS
Alumni	297	\$24,116	302	\$59,357	-2%	-59%
Corporations	31	40,451	28	106,392	11%	-62%
Foundations and Organizations	8	60,266	16	40,166	-50%	50%
Friends	316	55,879	334	68,638	-5%	-19%
SUBTOTAL CASH RECEIPTS	652	\$180,712	680	\$274,553	-4%	-34%
Gifts-in-kind	3	16,376	5	25,015	-40%	-35%
TOTAL ALL RECEIPTS	655	\$197,088	685	\$299,568	-4%	-34%

FISCAL-YEAR-TO-DATE

GIFT SOURCE	FY2019		FY2018		PCT. CHANGE	
	DONORS	DOLLARS	DONORS	DOLLARS	DONORS	DOLLARS
Alumni	586	\$111,924	539	\$138,123	9%	-19%
Corporations	64	540,404	59	556,331	8%	-3%
Foundations and Organizations	17	125,261	22	72,413	-23%	73%
Friends	530	224,372	545	161,614	-3%	39%
SUBTOTAL CASH RECEIPTS	1,197	\$1,001,961	1,165	\$928,481	3%	8%
Gifts-in-kind	5	34,376	11	28,441	-55%	21%
TOTAL ALL RECEIPTS	1,202	\$1,036,337	1,176	\$956,922	2%	8%

Advancement Committee Report Development Report November 2018

Planned Giving Update

FY2019 Planned Gift Report:

- Four planned gift commitments with a stated gift value of \$805,000 have been recorded thus far in FY19.
- Two planned gifts distributions from realized estates have been received during this fiscal year. The combined total of these estate distributions total \$30,012. We anticipate another distribution to be made from one of these estates with an additional expected value of \$70,000.
- We also have distributions pending from six other estates at some point in time as these estates are liquidated. The total of these six estates is anticipated to be over \$4,300,000.
- There are currently nine additional planned gifts in discussion with an estimated projected value exceeding \$10,400,000. There are also forty potential planned gifts in the early stage of discussion.
- We continue to market the planned giving program through a variety of means including face-to-face discussions, a monthly e-newsletter that goes out each month to over 20,000 individuals, bi-annual promotional mailing and an e-blast. We recently sent out an e-blast directed toward gifts of IRA Rollovers. Our fall marketing campaign focused on bequests and strategies for including a bequest for WSU in one's estate plans.

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 – October 1

Wright State hosted its second annual giving day, a digital philanthropic challenge to our alumni, friends, parents, students, faculty, and staff. Engaging with their *alma mater*, Wright State, for a day that will bring together ALL Raiders.

- Digital launch, Sunday, September 30
- Two events included:
 - Dayton Campus: Fifth Street Brew Pub, guest bartender and dine to donate
 - Lake Campus: C-Town Wings, dine to donate
- Student giving component during Wright Brothers Day on Friday, October 5

Used a tactical marketing campaign (phonathon, direct mail, email, and videos) to solicit donations.

2018 Results

- 550 Donors
- \$69,581
 - Two matches: \$3,750 WSU Alumni Association Match & \$5,000 Greentree Group
 - Phonathon gifts: 196 donors, \$21,215
 -

2017 Results

- 548 Donors
- \$47,502 Dollars
 - \$12,500 matching gifts: WSU Foundation and Greentree Group
 -

Fall Direct Mail Appeal

The annual fall direct mail appeal will mail around November 9. It will be customized with student features in each academic area. The primary audience for Fall Appeal is alumni, however, without traditional Phonathon again in FY19, this appeal will also be sent to friends.

Strategies

- Continue to personalize, including suggested giving amounts based on historical giving
 - Provide current donor club, if applicable
- Continue to solicit our most engaged alumni/friends utilizing our Wright State engagement scores in addition to utilizing our updated Wright State annual giving likelihood scores

CSIC Retiree Phonathon Campaign

For the fourth year, we will be calling our Retirees who have not contributed yet in the calendar year. These calls will take place over the month of November and December by our students. New this year will be a calling session with a handful of the WSU Retirees Association board members calling in addition to our students.

Advancement Committee Report
Discover Your Story: Archives Campaign Report
November 2018

Project Update:

- The Archives Team is working with Facilities on a new phased-in approach to the project so that the collections will begin to be moved to 2455 Presidential Drive in stages as funding permits.
- The Archives staff is planning for a partial move in May/June 2019.

Campaign Fundraising:

- We've submitted multiple proposals to national and local foundations for support of the project and have been successful in securing new gifts. They are as follows:
 - We received a new naming gift in support of the Exhibit Gallery—one of the most visible areas and most likely to experience high volumes of traffic.
 - We've submitted additional proposals that are currently being evaluated by local foundations and are preparing to make a major national ask.

Archives Tours

- Dawne Dewey continues to offer tours to prospective donors and to community members with the hope of introducing people to our collections and helping to spread the word about the project.

Gifts Committed to Date:

- To date, we've raised nearly \$750,000 toward the goal of \$6.5 million in CASH.
- There are 5 named spaces included in the giving totals
 - √ Amanda Wright Lane Lobby
 - √ Dr. Lewis Shupe Oral History Lab
 - √ Dr. Gary Barlow Conference Room
 - √ Makino, Inc. Volunteer and Student Center
 - √ Linda Black-Kurek Family Foundation Exhibit Gallery

Project Description:

- The Archives Center Modernization project provides for the renovation of 30,000 SF of space 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. They are moving from their current space in two campus locations of 12,000 square feet to a dedicated space of 30,000 square feet.