

**WRIGHT STATE UNIVERSITY  
BOARD OF TRUSTEES**

**Advancement Committee Report  
September 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  
September 2018**

**Updates:**

- ***flight magazine*** - with the support of the Wright State University Foundation, as well as other internal partners to include Donor Relations, Annual Giving, Alumni Relations, Advancement Communications, the Wright State Alumni Association and Foundation published its first standalone physical magazine for alumni and donors to receive via traditional mail. The publication is called flight.
  - *flight* provides a printed vehicle for alumni communications. An official ALUMNI and DONOR magazine for Wright State University.
  - Some specifics are:
    - 40+ pages, featuring alumni content, donor stories, event highlights, stories about students on campus, alumni success stories, etc.
    - Sent to a smaller 40,000 list, including the more than 25,000 individual donors to the Rise. Shine. Campaign
    - 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 the Archives Project)
    - Mailed in August 2018
    - So far, the magazine has influenced 7 donors to give donations totaling \$1,280.
  
- ***Event Highlights:***
  - ***Theatre, Dance and Motion Pictures Reunion*** - In August, the Alumni Association, in collaboration with the Theatre, Dance, and Motion Pictures department hosted an Alumni Reunion Weekend. This Reunion weekend consisted of a cocktail reception and dance party on Friday Night, a family friendly picnic on Saturday, and a visit to Yellow Springs on Sunday. The Reunion Weekend was a huge success with over 100 alumni who traveled from 22 different states, Japan, and Spain to attend the Reunion.
  - ***8th Annual Bourbon Tour***- Once again, this year's highly anticipated event sold out in less than 48 hours with 54 attendees traveling to Louisville to experience the Bourbon Trail. The trip includes stops at Kentucky Artisan Distillery, Angel's Envy Distillery, and Old Forester Distillery.
  - ***Kings Island Day***- This year's Wright State Day at Kings Island was held on Sunday, July 27<sup>th</sup>, in collaboration with the Boonshoft School of Medicine. We had nearly 200 attendees participate in the event.
  - ***Lake Campus Wine Tasting Fundraiser*** - The Lake Campus Alumni Network continues to raise funds for their endowed scholarship. This year, the network raised \$700 for their scholarship through this event. The event was open to the community and 40 people attended the fundraiser.

- **Homecoming - October 1 – 6** The week kicks off with our 2<sup>nd</sup> annual Wright Day to Give and ends with the usual Alumni Achievement Awards, Trivia Night, Pub Science, and the anchor of the weekend, the Homecoming festival. Check out [wright.edu/homecoming](http://wright.edu/homecoming) for a complete list of events.
- 2nd Annual Alumni Service Day - This year's Alumni Service Day will be on **Saturday, November 10th from 9:00 am-12 noon**. The Alumni Association has partnered with 12 local non-profit organizations to provide over 150 volunteer opportunities for alumni in the region.

□ ***Upcoming Events***

- Sept. 15-16 -Bourbon Tour
- Oct. 1 -Wright Day to Give
- Oct. 1-6 -Homecoming
  - Oct. 5 -Alumni Achievement Awards
  - Oct. 6 -Homecoming Festival
- Oct. 29 -Campus Costume Fun Run
- Nov. 10 -Alumni Service Day
- Dec. 1-2 -Chicago Holiday Bus Tour
- March 2 -Rowdy Gras
- April 5 -Amigos Latinx Gala

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

There was little change in the value of the Foundation’s endowment portfolio since the last report, which provided investment results through February 2018. The portfolio finished FY18 with a value of \$84.8 million, up nearly \$6.0 million for the year, including net capital contributions of \$1.5 million. The portfolio generated a positive return of 7.06% for the year, a figure that includes private equity investments. Taking private equity out of the picture, the portfolio returned 6.54%, which underperformed its weighted average benchmark by 48 basis points. The three-, five- and ten-year portfolio returns were 5.67%, 6.45% and 5.52% as of June 30<sup>th</sup>. Equity investments were the top performers for FY18 returning 10.12% for the year. Domestic equities beat international equities returning 12.33% versus 9.32% for international. Within the domestic equity space, small cap returns of 14.83% bested large cap returns of 14.50%. Fixed income investments resulted in a gain to the portfolio of 1.36% for the year, while alternative assets added 7.99%. Within the latter category, our investment in energy debt returned 9.36% and hedge fund returns were 6.53%. Asset allocations at the end of June were in line with our investment policy, with actual allocations as follows: 44% equities, 23% fixed income, 13% multi-asset, and 20% alternatives.

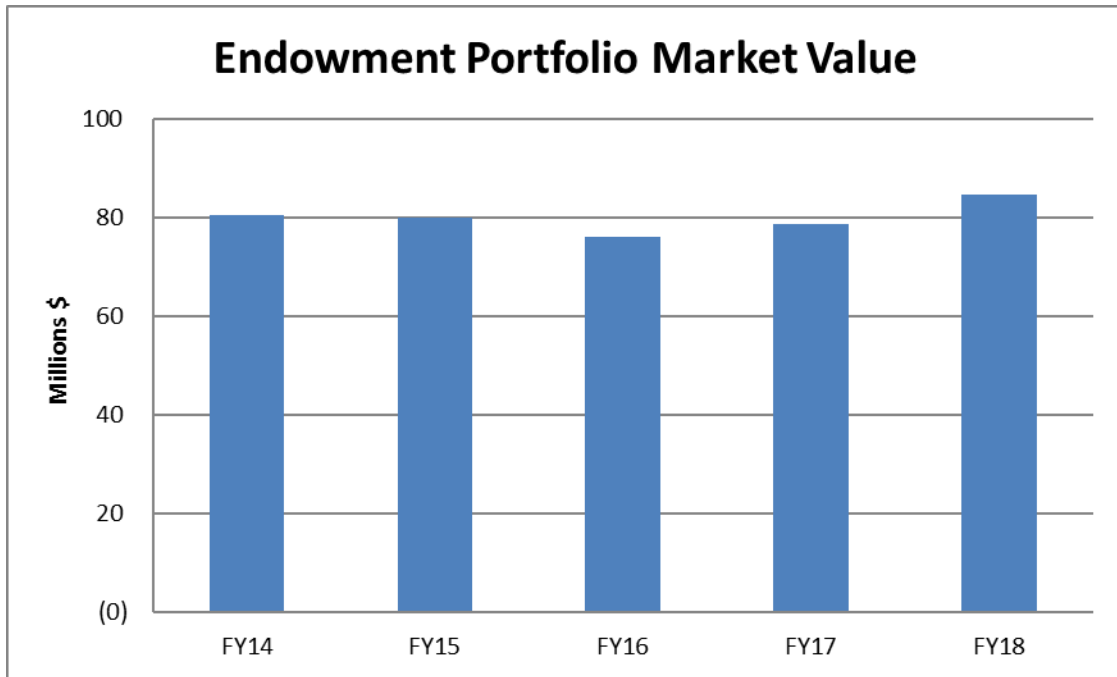
Although unaudited, the Foundation’s gross reserve increased \$1.1 million, or 14.9%, during FY18. The Foundation expects to report its value at \$8.7 million as of June 30<sup>th</sup>. This growth is attributable to the Foundation’s FY18 revenue realization rate of 118% and its budget expenditure rate of 82%.

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

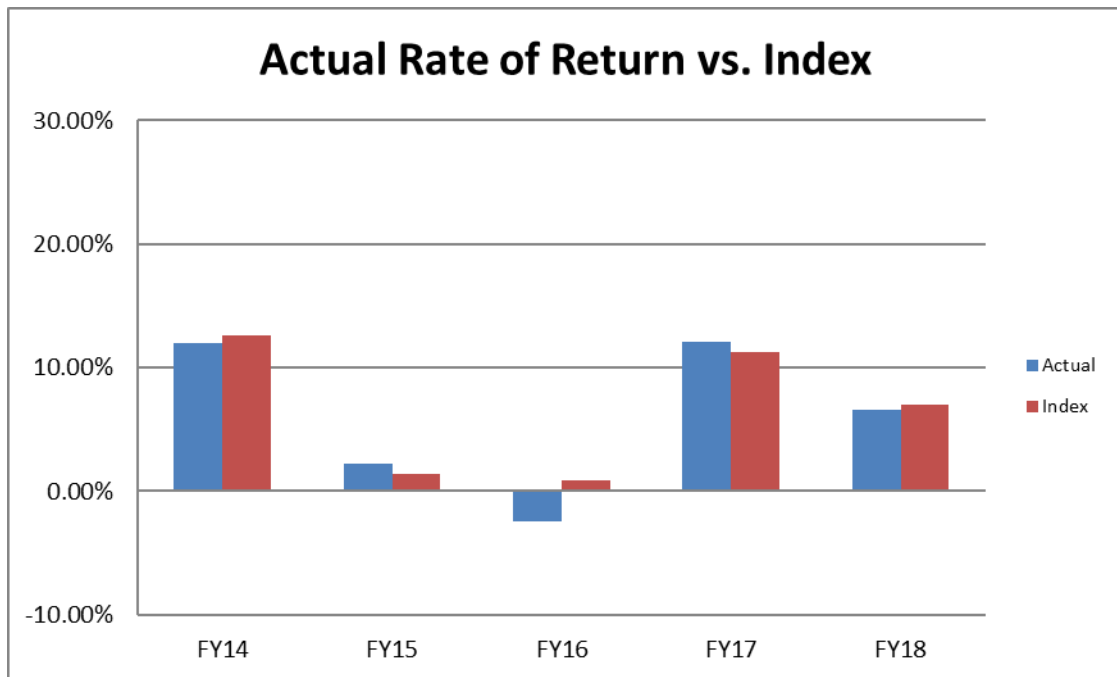
**Endowment Portfolio Composition**

<b>Asset Class</b>	<b>Target Allocation</b>	<b>Actual Allocation</b>	<b>Market Value June 30, 2018</b>
<b>Equity</b>	<b>42%</b>	<b>44%</b>	<b>\$36,974,358</b>
<b>Fixed income</b>	<b>24%</b>	<b>23%</b>	<b>19,903,337</b>
<b>Multi-asset</b>	<b>14%</b>	<b>13%</b>	<b>11,185,109</b>
<b>Hedge funds</b>	<b>8%</b>	<b>8%</b>	<b>6,728,885</b>
<b>Private equity</b>	<b>8%</b>	<b>7%</b>	<b>6,013,368</b>
<b>Energy Debt</b>	<b>4%</b>	<b>5%</b>	<b>3,981,090</b>
<b>Cash &amp; equivalents</b>	<b>0%</b>	<b>0%</b>	<b>0</b>
<b>Totals</b>	<b>100%</b>	<b>100%</b>	<b>\$84,786,147</b>

### Endowment Value

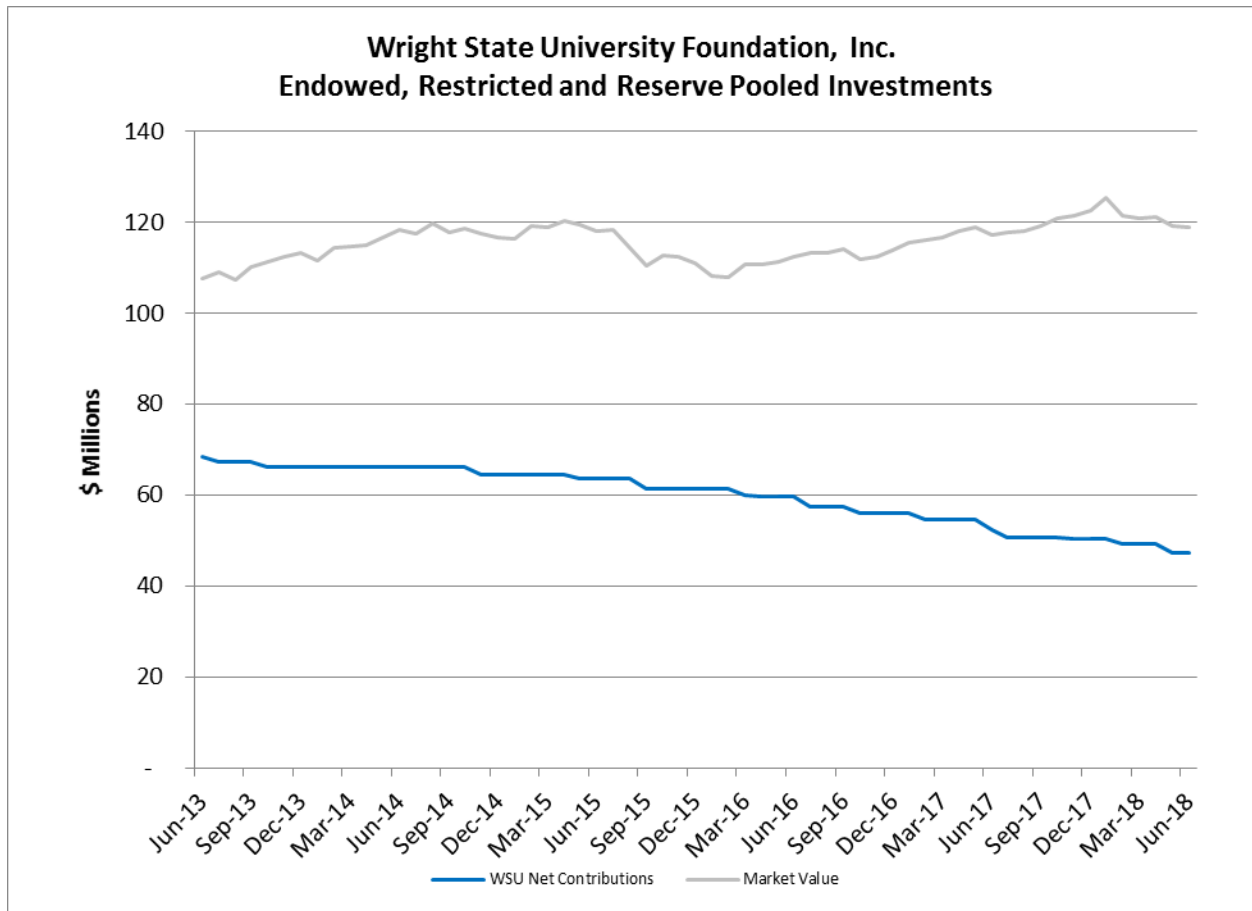


### Endowment Historical Rates of Return



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 July 31, 2018**

(including totals from prior fiscal year)

**BY SOURCE**

SOURCE	CASH <sup>1</sup>	PLEDGES <sup>2</sup>	IRREVOCABLE		REVOCABLE		CURRENT FYTD	PRIOR FYTD
			DEFERRED	GIFTS <sup>3</sup>	GIFTS OF	DEFERRED	TOTALS	TOTALS
					PROPERTY <sup>4</sup>	GIFTS <sup>5</sup>		
Alumni	\$30,334	\$400	\$0	\$0	\$0	\$0	\$30,734	\$26,529
Corporations	167,069	0	0	0	0	0	167,069	178,455
Foundations and Organizations	56,363	0	0	0	0	0	56,363	28,397
Friends	22,675	200	0	3,000	0	0	25,875	42,096
<b>CURRENT FYTD TOTALS</b>	<b>\$276,441</b>	<b>\$600</b>	<b>\$0</b>	<b>\$3,000</b>	<b>\$0</b>	<b>\$0</b>	<b>\$280,041</b>	
<b>PRIOR FYTD TOTALS</b>	<b>\$265,710</b>	<b>\$6,600</b>	<b>\$0</b>	<b>\$3,167</b>	<b>\$0</b>	<b>\$0</b>		<b>\$275,477</b>
<b>% CHANGE FROM PRIOR FISCAL YEAR</b>	<b>4.0%</b>	<b>-90.9%</b>	<b>N/A</b>	<b>-5.3%</b>	<b>N/A</b>	<b>N/A</b>	<b>1.7%</b>	

**BY UNIT**

UNIT	CASH <sup>1</sup>	PLEDGES <sup>2</sup>	IRREVOCABLE		REVOCABLE		CURRENT FYTD	PRIOR FYTD
			DEFERRED	GIFTS <sup>3</sup>	GIFTS OF	DEFERRED	TOTALS	TOTALS
					PROPERTY <sup>4</sup>	GIFTS <sup>5</sup>		
Boonshoft School of Medicine	\$18,642	\$300	\$0	\$0	\$0	\$0	\$18,942	\$41,104
College of Education & Human Services	2,200	100	0	0	0	0	2,300	2,300
College of Engineering & Computer Science	25,830	0	0	0	0	0	25,830	380
College of Liberal Arts	22,572	200	0	3,000	0	0	25,772	20,650
College of Nursing & Health	17,355	0	0	0	0	0	17,355	1,820
College of Science & Math	42,650	0	0	0	0	0	42,650	52,676
Curriculum & Instruction	15,369	0	0	0	0	0	15,369	10,500
Enrollment Management	3,150	0	0	0	0	0	3,150	2,257
Intercollegiate Athletics	29,852	0	0	0	0	0	29,852	23,532
Lake Campus	0	0	0	0	0	0	0	50
Other	28,721	0	0	0	0	0	28,721	28,609
Raj Soin College of Business	20,750	0	0	0	0	0	20,750	7,221
School of Professional Psychology	0	0	0	0	0	0	0	670
Student Affairs	42,295	0	0	0	0	0	42,295	82,828
University College	0	0	0	0	0	0	0	0
University Libraries	7,055	0	0	0	0	0	7,055	880
<b>CURRENT FYTD TOTALS</b>	<b>\$276,441</b>	<b>\$600</b>	<b>\$0</b>	<b>\$3,000</b>	<b>\$0</b>	<b>\$0</b>	<b>\$280,041</b>	
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<sup>1</sup> Cash, checks, credit cards, electronic transfers, matching gifts, insurance premiums, etc.

<sup>2</sup> Conditional, deferred, irrevocable and revocable pledges.

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

<sup>4</sup> 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.

<sup>5</sup> 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 July 31, 2018 and 2017**

**MONTH-TO-DATE**

GIFT SOURCE	JUL 2018		JUL 2017		PCT. CHANGE	
	DONORS	DOLLARS	DONORS	DOLLARS	DONORS	DOLLARS
Alumni	406	\$54,264	366	\$36,643	11%	48%
Corporations	24	443,277	20	285,996	20%	55%
Foundations and Organizations	8	56,363	2	28,397	300%	98%
Friends	414	39,331	390	55,328	6%	-29%
<b>SUBTOTAL CASH RECEIPTS</b>	<b>852</b>	<b>\$593,235</b>	<b>778</b>	<b>\$406,364</b>	<b>10%</b>	<b>46%</b>
Gifts-in-kind	1	3,000	3	3,167	-67%	-5%
<b>TOTAL ALL RECEIPTS</b>	<b>853</b>	<b>\$596,235</b>	<b>781</b>	<b>\$409,531</b>	<b>9%</b>	<b>46%</b>

**FISCAL-YEAR-TO-DATE**

GIFT SOURCE	FY2019		FY2018		PCT. CHANGE	
	DONORS	DOLLARS	DONORS	DOLLARS	DONORS	DOLLARS
Alumni	406	\$54,264	366	\$36,643	11%	48%
Corporations	24	443,277	20	285,996	20%	55%
Foundations and Organizations	8	56,363	2	28,397	300%	98%
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**Advancement Committee Report  
Development Report  
September 2018**

**Planned Giving Update**

FY 2018 Planned Gift Results:

- 4 planned gift commitments with a stated gift value of \$1,023,000 were recorded in FY18. Three of the four are bequest expectancies; one charitable gift annuity was written.
- Five planned gifts were realized. The total value of estate gifts realized exceeded \$600,000.
- We closed out the fiscal year waiting to receive the disbursement from five other estates with a combined value in excess of \$4 million. The majority of this total is tied up in two complicated estates so we don't anticipate these estates to be realized in the time frame more typical of the average estate. Two of the five planned gift expectancies are from two donors who had not previously notified us of their estate intentions.
- As of the end of the fiscal year, there were eight additional planned gifts in discussion with an estimated projected value of \$7,432,000. There are currently another 32 potential planned gifts in early stage discussion

The Wright State University Planned Giving Website continues to be a valuable tool for marketing gift planning concepts and information. It is outsourced to our 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](http://wright.edu/plannedgiving))

**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.

**Spring Phonathon**

In a year without traditional Phonathon, several strategies were implemented to close out our phonathon program for FY18.

Spring mini campaigns included:

- BSOM, January

- Donors who have historically given through Phonathon in the last three years, March and April

FY18 Phonathon results as of 6/30/2018: \$31,949, 294 donors. With a fulfillment rate of 83%.

**Spring Direct Mail (FY18) Appeal**

- 90 day results FY18 \$93,020 664 gifts
- 90 day results FY17 \$92,855 688 gifts
- 90 day results FY16 \$68,871 490 gifts
- 90 day results FY15 \$53,902 372 gifts

**2018 Faculty, Staff & Retiree Campaign**

- 6/30/2018 Results \$348,917 47% participation among Full-time Staff & Faculty
- 6/30/2017 Results \$379,147 44% participation among Full-time Staff & Faculty
- 6/30/2016 Results \$508,903 48% participation among Full-time Staff & Faculty
- 6/30/2015 Results \$523,138 57% participation among Full-time Staff & Faculty

2018 results will be calculated through December 31, 2018.

**The Wright Day to Give – October 1**

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

- Digital launch, Sunday, September 30
- Two events:
  - 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

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

**Fall Direct Mail Appeal**

The annual fall direct mail appeal will mail around November 1. 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 who are donors.

**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

**Advancement Committee Report**  
***Discover Your Story: Archives Campaign Report***  
**September 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 likely in the spring of 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:
  - Makino, Inc. of Mason, OH has made a gift to name the Volunteer/Student Center.
  - The Virginia Toulmin Foundation has made a commitment contingent on the successful completion of the fundraising goal.
  - 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.
- In October, we will be welcoming back Ann Weisgarber, national author and WSU Alumna, who will be offering lectures about the importance of archives.

**Gifts Committed to Date:**

- To date, we've raised nearly \$600,000 toward the goal of \$6.5 million in CASH.
- There are 4 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

**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.