

**WRIGHT STATE UNIVERSITY  
BOARD OF TRUSTEES**

**Advancement Committee Report  
September 2019**

1. Alumni Relations Report
2. Wright State Foundation Financial Report
3. Development Report
4. *Discover Your Story*: Archives Campaign Report
5. Corporate and Foundation Relations (FCR) Update

**Advancement Committee Report  
Alumni Relations Report  
September 2019**

**Updates:**

**FESTIVAL OF FLIGHT**

New Festival of Flight to celebrate aviation in the Miami Valley.

The all-day festival will take place behind the Wright State University Nutter Center on Oct. 5, 2019. The festival will be sponsored by the City of Fairborn, Wright State University, and the Wright State Alumni Association, in partnership with the Miami Valley Restaurant Association, the National Aviation Heritage Alliance, the National Aviation Hall of Fame, and the National Museum of the U.S. Air Force.

The festival will feature aviation-related educational experiences, flight-themed food and drinks, entertainment (including live bands), a dedicated area with fun activities for children, and a haunted trail. Sports fans can watch games by the Wounded Warrior Amputee Softball Team and the Wright State volleyball, men's soccer, and club football teams. Wright State students will participate in a parade of golf carts that they will decorate with flight themes.

The festival will appeal to families from around the Miami Valley and flight enthusiasts across the country. The event is expected to attract an estimated 10,000 to 12,000 people.

More details, including a schedule of performances, games, and activities, is available at [festivalofflight.org](http://festivalofflight.org)

## WRIGHT STATE MAGAZINE

The Fall 2019 issue of Wright State Magazine will land in mailboxes at the end of August.

The cover story is called “A City of Gems” and features profiles of 12 alumni who have made an impact on the rebirth of downtown Dayton.

They are:

YEVETTA HAWLEY '09 DIRECTOR OF NURSING PUBLIC HEALTH–DAYTON & MONTGOMERY COUNTY	ERIC FELTNER '11 ASSISTANT PRINCIPAL DAYTON EARLY COLLEGE ACADEMY–DECA MIDDLE
JEFF HOAGLAND '00 PRESIDENT AND CEO DAYTON DEVELOPMENT COALITION	SANDY GUDORF '85 PRESIDENT DOWNTOWN DAYTON PARTNERSHIP
ALEX WILKER '16 MANAGER, CORPORATE PARTNERSHIPS DAYTON DRAGONS PROFESSIONAL BASEBALL TEAM	JUDY DODGE '85 COUNTY COMMISSIONER MONTGOMERY COUNTY, OHIO
DAVE DICKERSON '84 PRESIDENT DAYTON CONSTRUCTION SALES AND DEVELOPMENT MILLER-VALENTINE GROUP	SHAUN HAMILTON '13 SYSTEM DIRECTOR FOR COMMUNITY BENEFITS PREMIER HEALTH
RICHARD KAISER '08 FOUNDER WILDERNESS AGENCY	CHRIS KERSHNER '00 EXECUTIVE VICE PRESIDENT DAYTON AREA CHAMBER OF COMMERCE
JEFFREY MIMS '75 CITY COMMISSIONER CITY OF DAYTON	NAN WHALEY '09 MAYOR CITY OF DAYTON

We will also be featuring stories on:

- The recovery efforts of student athletes following the devastating tornadoes in the Dayton area
- A profile on alumnus Chris Tung, employed by Netflix
- A feature on how WSU is following the national trend of more students studying abroad and how our program is helping students with disabilities study abroad

## NEW VOLUNTEER PROGRAM

As part of our revamped volunteer program, we have launched a new volunteer management software, VolunteerHub. VolunteerHub will allow us to maintain a database of all of our alumni volunteers, track alumni service hours, and stay in communication about upcoming volunteer opportunities, such as the Alumni Service Day in November.

## WRIGHT STATE ALUMNI ASSOCIATION STRATEGIC PLANNING

The Wright State Alumni Association Board reviewed the WSUAA Strategic Plan draft at the May 4, 2019 Board meeting and voted to approve the plan at the August 3, 2019 Board meeting. The plan runs from FY20 to FY22 and will begin implementation immediately. The 5 key strategies are:

1. Offer a diverse set of opportunities & programs
2. Build alumni engagement with Wright State University
3. Increase Wright State alumni brand awareness
4. Achieve financial sustainability
5. Improve staff & board effectiveness

## **EVENT UPDATES**

- The Alumni Association hosted its 43rd Annual Legacy Scholarship Golf Outing on Friday, August 2 at Heatherwoode Golf Course in Springboro. This year's golf outing was attended by 107 golfers and raised nearly \$20,000 in student scholarship dollars. This year's outing saw a player increase of 60% and an increase in funds raised by \$5,000.00.
- The 9th Annual Bourbon Tour will be on September 14-15. This is one of the Alumni Association's most popular events, usually selling out within a few weeks. This year's trip will include visits to Heaven Hill Distillery, Bardstown Distilling Company, and Rabbit Hole Distillery. Attendees will spend the night in downtown Louisville before returning on Sunday morning.
- Wright State Norwegian Cruise set for 2020!  
The Wright State Alumni Association has partnered with Norwegian Cruise Line to provide alumni and friends of Wright State a one of a kind travel experience. In May of 2020, we will embark on a 7-day cruise from New York City to Bermuda aboard NCL's newest ship (not sailing yet), ENCORE. More information about this trip can be found at [www.wrightstatealumni.com](http://www.wrightstatealumni.com)

## **UPCOMING EVENTS:**

Saturday, September 14: 9<sup>th</sup> Annual Bourbon Tour (overnight)

Wednesday, September 18: Social Work Alumni Society Beer and Wine Tasting

Saturday, September 21: Sapphire Jubilee

Monday, September 30 – Saturday, October 5: Homecoming

Tuesday, October 1: Wright Day to Give

Friday, October 4: Alumni Achievement Awards

Friday, October 4: Trivia Night

Saturday, October 5: Festival of Flight

Saturday, November 9: Alumni Service Day

Saturday, November 9: Veteran and Military Center Champions Ball

Friday, December 13-15: Chicago Holiday Tour (overnight)

May, 2020: Wright State Norwegian Cruise from NYC to Bermuda

**Advancement Committee Report**  
**Wright State University Foundation Report**  
**September 2019**

The Foundation’s endowment portfolio closed the year in positive territory after suffering significant losses in the fourth quarter of 2018. Declining concerns about trade wars and generally positive economic news drove the turnaround, which allowed most asset classes to post positive results for the fiscal year. As indicated below, our endowment portfolio finished the month of June 2019 with a market value of just under \$89.1 million, an increase of \$4.3 million or 5.1% over its value on July 1, 2018. For the year, the endowment portfolio returned a positive 4.18%; that return lagged its weighted benchmark by 147 basis points. Adding private equity returns to this return resulted in a total return of 4.85% (net of fees) for the year. The total return was driven more by fixed income investments (+6.87% for the year) than by equities (+5.05%). Domestic equities outpaced international (ex-US) securities, which returned an anemic +0.15% for the year. In the domestic stock space, large cap (+9.96%) outperformed small cap, with the latter contributing to a drag on returns (-1.88%). Our managed volatility investment added the greatest value to equity returns for the year, returning a positive 11.74%. Fixed income returns were positive across the board with emerging markets debt providing the strongest performance at a positive 9.84%. Alternative investments, excluding private equity, did not fare as well. Our hedge fund-of-funds returned +3.3% for the year while our energy debt investment lost 6.78%. Both private equity investments experienced positive returns for the year, with the latest vintage returning an impressive 17.92%. At June 30, 2019, the portfolio’s three-, five-, and ten-year net returns were 8.05%, 4.89%, and 8.66%, respectively.

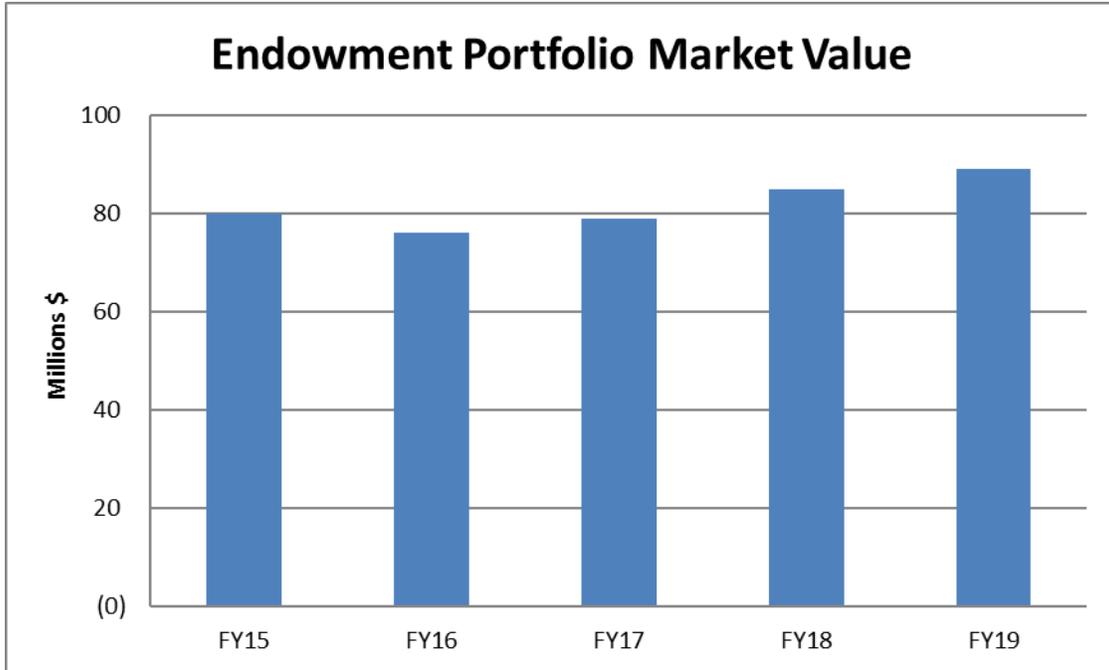
Partially as a result of the positive investment earnings described above, the Foundation’s gross reserve position increased 4.4% during the year to finish with a value of \$9.1 million on June 30<sup>th</sup>. Increased revenue from both endowment administration fees and unrestricted gifts also contributed to the increase, as did spending levels at 82% of budget.

The Foundation’s current endowment portfolio composition, including target allocations, actual allocations, and market values, as of June 30, 2019, is presented below:

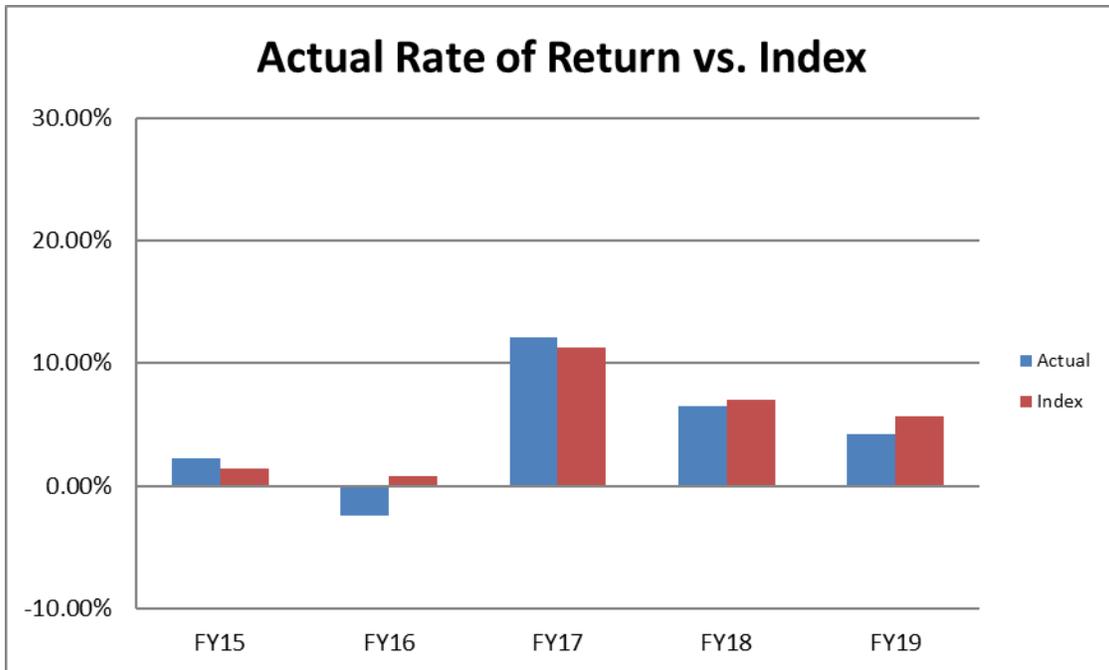
**Endowment Portfolio Composition**

<b><u>Asset Class</u></b>	<b><u>Target Allocation</u></b>	<b><u>Actual Allocation</u></b>	<b><u>Market Value June 30, 2019</u></b>
<b>Equity</b>	<b>54%</b>	<b>53%</b>	<b>\$47,686,371</b>
<b>Fixed income</b>	<b>23%</b>	<b>28%</b>	<b>24,879,295</b>
<b>Hedge funds</b>	<b>8%</b>	<b>8%</b>	<b>6,952,956</b>
<b>Private equity</b>	<b>8%</b>	<b>7%</b>	<b>5,853,059</b>
<b>Energy debt</b>	<b>4%</b>	<b>4%</b>	<b>3,711,197</b>
<b>Structured credit</b>	<b>3%</b>	<b>0%</b>	<b>0</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>\$89,082,878</b>

## Endowment Value

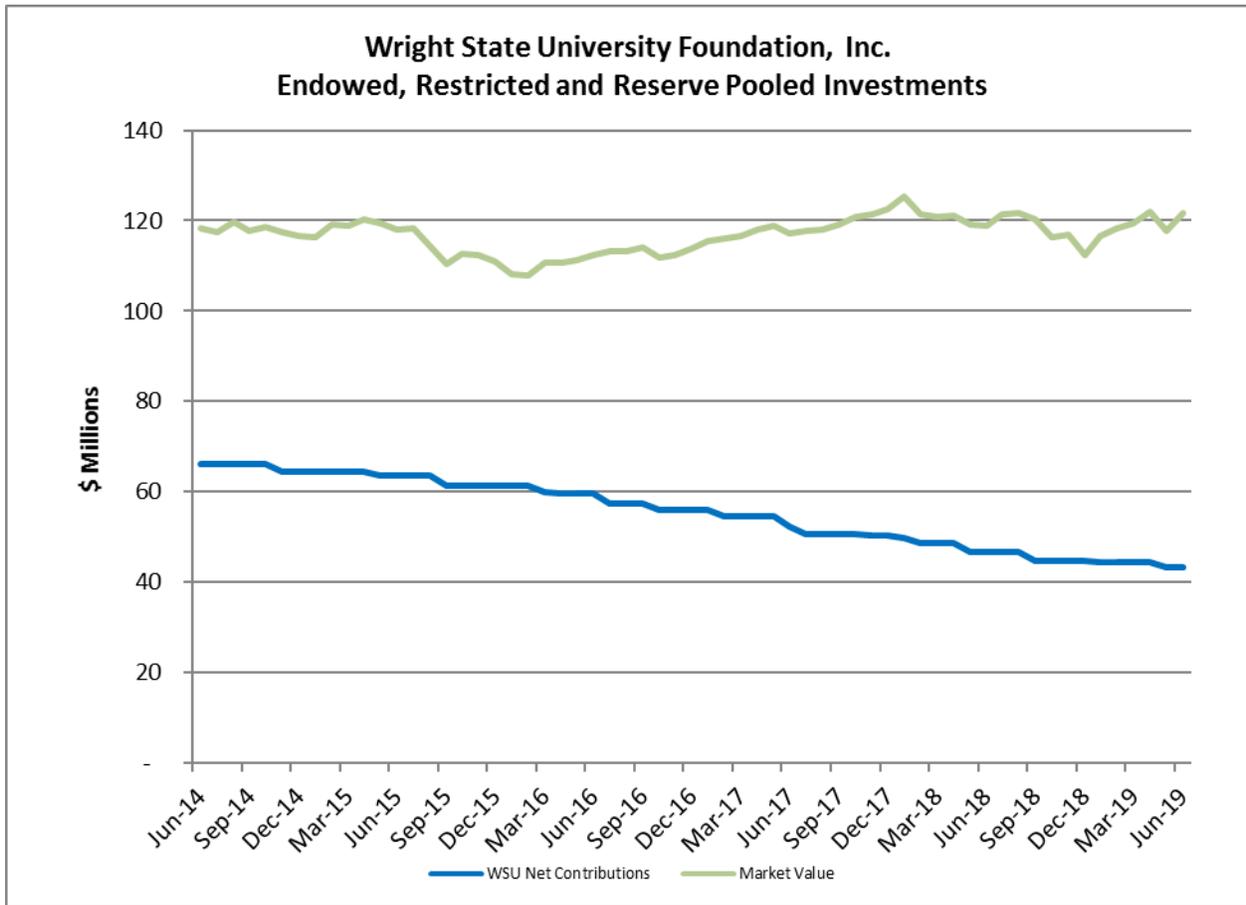


## Endowment Historical Rates of Return



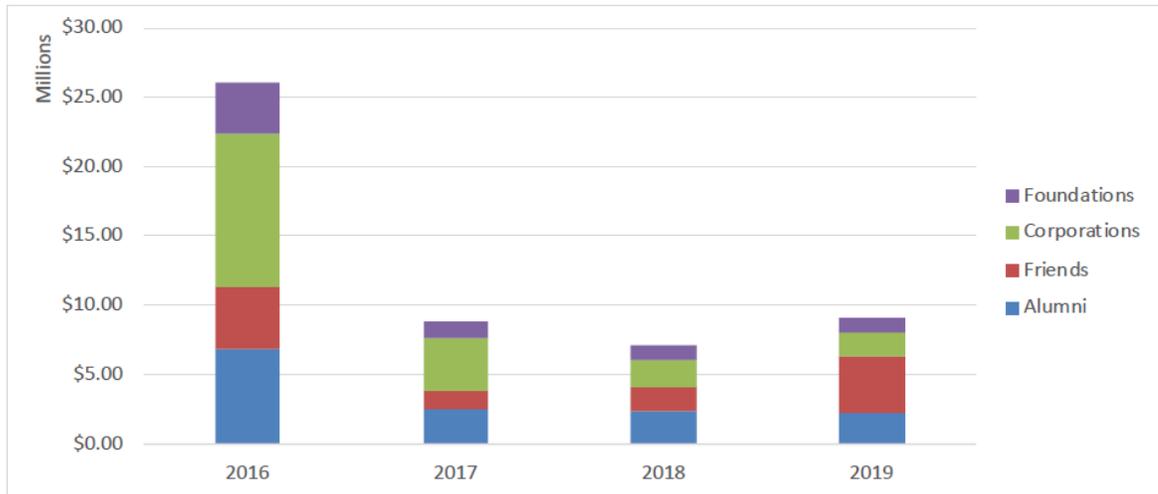
The index is composed of various market indices of like asset classes in the same proportion as the Foundation's approved asset allocation as defined in its Investment Policy Statement (IPS).

**All Portfolios Value vs. Contributions**



**Commitments per Fiscal Year by Source: Dollars**  
**July 1, 2015 - June 30, 2019**

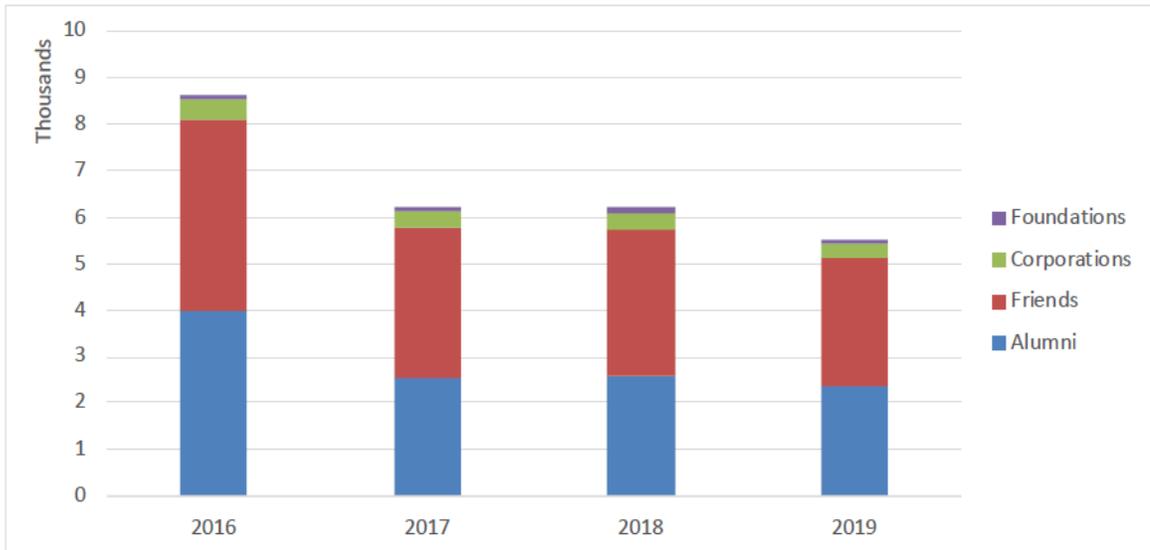
Fiscal Year	Alumni		Friends		Corporations		Foundations		Total Amount Given
	Amount Given	%	Amount Given	%	Amount Given	%	Amount Given	%	
2016	\$6,890,945.04	26.4%	\$4,418,500.72	16.9%	\$11,065,409.21	42.4%	\$3,750,049.15	14.4%	\$26,124,904.12
2017	\$2,587,325.50	29.0%	\$1,215,787.11	13.6%	\$3,818,158.88	42.8%	\$1,294,123.81	14.5%	\$8,915,395.30
2018	\$2,436,034.76	33.9%	\$1,665,451.41	23.2%	\$1,971,859.79	27.4%	\$1,119,374.33	15.6%	\$7,192,720.29
2019	\$2,308,287.24	25.3%	\$4,067,735.03	44.6%	\$1,682,844.89	18.4%	\$1,063,106.81	11.7%	\$9,121,973.97



*This report includes all pledges and gifts to Wright State University Foundation, not pledge payments.*

**Commitments per Fiscal Year by Source: Donors**  
**July 1, 2015 - June 30, 2019**

Fiscal Year	Alumni		Friends		Corporations		Foundations		Total No of Donors
	No of Donors	%	No of Donors	%	No of Donors	%	No of Donors	%	
2016	3,997	46.3%	4,091	47.4%	426	4.9%	116	1.3%	8,630
2017	2,562	41.2%	3,210	51.6%	344	5.5%	103	1.7%	6,219
2018	2,582	41.5%	3,164	50.9%	343	5.5%	127	2.0%	6,216
2019	2,380	43.1%	2,728	49.3%	318	5.8%	102	1.8%	5,528



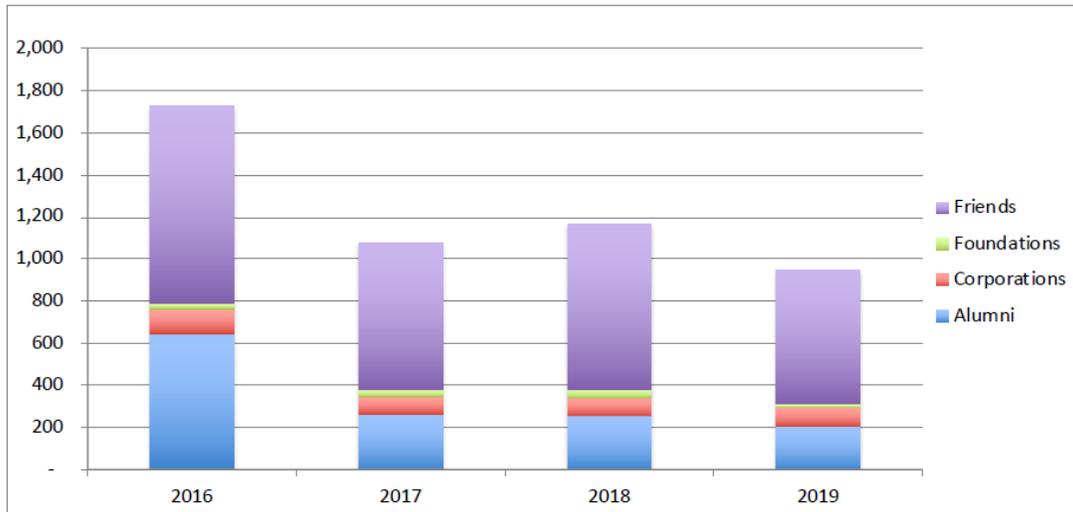
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**Commitments per Fiscal Year by Area/Unit**  
July 1, 2015 - June 30, 2019

Area/Program	2016	2017	2018	2019
<b>Athletics</b>	<b>\$1,624,873.23</b>	<b>\$466,699.02</b>	<b>\$548,935.74</b>	<b>\$3,043,026.27</b>
<b>Colleges and Schools</b>	<b>\$19,362,930.70</b>	<b>\$6,403,976.17</b>	<b>\$4,872,318.83</b>	<b>\$4,840,704.56</b>
CECS	\$2,688,041.12	\$1,030,048.08	\$1,499,699.33	\$558,682.71
CEHS	\$91,686.41	\$110,049.85	\$66,036.84	\$85,999.53
COLA	\$990,297.46	\$785,170.57	\$919,476.38	\$1,298,990.59
CONH	\$571,485.30	\$1,554,733.89	\$213,048.99	\$303,796.20
COSM	\$10,920,654.39	\$558,985.26	\$163,270.85	\$170,318.00
LAKE	\$1,327,467.92	\$255,659.92	\$227,019.92	\$309,280.14
RSCB	\$494,747.31	\$810,209.59	\$264,255.24	\$473,631.30
BSOM	\$2,135,680.79	\$1,182,031.01	\$1,483,914.36	\$1,611,224.40
SOPP	\$142,870.00	\$117,088.00	\$35,596.92	\$28,781.69
<b>Student Affairs</b>	<b>\$113,394.29</b>	<b>\$146,257.39</b>	<b>\$365,208.73</b>	<b>\$126,351.38</b>
<b>University Libraries</b>	<b>\$93,412.03</b>	<b>\$67,115.31</b>	<b>\$287,080.65</b>	<b>\$544,886.26</b>
<b>University Wide</b>	<b>\$4,930,293.87</b>	<b>\$1,831,347.41</b>	<b>\$1,119,176.34</b>	<b>\$567,005.50</b>
<b>Grand Total</b>	<b>\$26,124,904.12</b>	<b>\$8,915,395.30</b>	<b>\$7,192,720.29</b>	<b>\$9,121,973.97</b>

**New Donors per Fiscal Year**  
July 1, 2015 - June 30, 2019

Fiscal Year	Alumni	Corporations	Foundations	Friends	Grand Total	
2016		644	120	28	933	1,725
2017		264	84	32	695	1,075
2018		255	86	41	784	1,166
2019		206	89	17	633	945



*This report includes all pledges and gifts to Wright State University Foundation, not pledge payments.*

**WRIGHT STATE UNIVERSITY FOUNDATION, INC.**

**Report of Total Receipts: Cash and Gifts-in-Kind**

**For the Month Ended July 31, 2019 and 2018**

**MONTH-TO-DATE**

GIFT SOURCE	JULY 2019		JULY 2018		PCT. CHANGE	
	DONORS	DOLLARS	DONORS	DOLLARS	DONORS	DOLLARS
Alumni	289	\$114,668	407	\$54,267	-29%	111%
Corporations	22	262,846	24	443,278	-8%	-41%
Foundations and Organizations	3	14,366	8	56,363	-63%	-75%
Friends	343	64,974	412	39,078	-17%	66%
<b>SUBTOTAL CASH RECEIPTS</b>	<b>657</b>	<b>\$456,854</b>	<b>851</b>	<b>\$592,986</b>	<b>-23%</b>	<b>-23%</b>
Gifts-in-kind	2	134	1	3,000	100%	-96%
<b>TOTAL ALL RECEIPTS</b>	<b>659</b>	<b>\$456,988</b>	<b>852</b>	<b>\$595,986</b>	<b>-23%</b>	<b>-23%</b>

**FISCAL-YEAR-TO-DATE**

GIFT SOURCE	FY2020		FY2019		PCT. CHANGE	
	DONORS	DOLLARS	DONORS	DOLLARS	DONORS	DOLLARS
Alumni	289	\$114,668	407	\$54,267	-29%	111%
Corporations	22	262,846	24	443,278	-8%	-41%
Foundations and Organizations	3	14,366	8	56,363	-63%	-75%
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## **Advancement Committee Report Development Report September 2019**

### **Planned Giving Update**

FY19 Planned Gift Results:

- 12 planned gift commitments with a stated gift value of \$4,391,000 were recorded in FY19. The twelve commitments include an addition to a Charitable Remainder Trust, a re-articulation of a past bequest; six bequest commitments, two IRA beneficiary designations and two charitable gift annuities were written.
- Seven planned gifts were realized. The total value of estate gifts realized totaled \$254,763.
- We closed out the fiscal year awaiting 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.
- As of the end of the fiscal year, there were nine additional planned gifts in discussion with an estimated projected value of nearly \$11,500,000. There are currently another 38 potential planned gifts in early stage discussion

FY20 Update

- The new fiscal year is off to a good start with one bequest commitment totaling \$90,000 already documented.
- Additionally, we have received \$100,000 in realized estate gifts from recently closed out estates.

### **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 will be implemented.

## Campaigns:

- BSOM was cancelled due to the faculty strike
- Wed to Wed Alumni, February
- Spring all donor categories and donor types, March – April

**FY19 Phonathon results: \$30,571 from 297 donors. With a fulfillment rate of 81%.**

### **Spring Direct Mail (FY19) Appeal**

- 90 day results FY19 \$78,621 576 gifts
- 90 day results FY18 \$93,019 664 gifts  
\*Included a unique \$10,000 gift
- 90 day results FY17 \$92,855 688 gifts
- 90 day results FY16 \$68,871 490 gifts
- 90 day results FY15 \$53,902 372 gifts

### **2019 Faculty, Staff & Retiree Campaign**

- 6/30/2019 Results \$311,625 40% participation among Full-time Staff & Faculty
- 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

2019 results will be calculated through December 31, 2019.

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

Wright State will host its third 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, Monday, September 30
- Digital Day of Giving, Tuesday, October 1
- Three events:
  - Dayton Campus: Warped Wing Share a Pint Night, \$1 from every beer is donated to WSU Foundation
  - Lake Campus: CJ's HighMarks-Celina location, dine to donate 20% of sales
  - On Campus Kickoff Event being planned
- Student giving component happening the week of September 30 – October 4

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 8. 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 FY20, 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 2019**

**Project Update:**

- The Archives Team is collaborating with Facilities in order to carry out the process for implementing Phase 1 of the renovation project. Upon completion of Phase 1, the Archives will be able to be moved over to its new home.
- The Archives Team is also working with Facilities on cost projections for Phase 2 so that we can focus our fundraising efforts on a defined dollar goal and outline of specific renovation components included within that Phase.

**Campaign Fundraising:**

- We have multiple proposals that will be going out this Fall to local and national foundations for support. We are also refocusing our efforts on specific individuals to solicit for the elements of Phase 2.

**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 have pledges and resources totaling \$912,000 toward the project.
- 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.

**Advancement Committee Report  
Corporate and Foundation Relations (FCR) Update  
September 2019**

- **Prospect Discovery and Cultivation**

- Dayton Business Journal (DBJ) Books of Lists Review: New individual and corporate prospects are being identified through an intensive, systematic review of the DBJ Book of Lists. Top 100 companies are listed by category, such as Veteran Owned Businesses, Women Owned Business, Engineering Firms, etc. and we are reviewing those lists most harmonious with Wright State's mission. Within a two-month period, over 30 new prospects have already been identified and entered into the pipeline for discovery visits.
- Corporate Scoring/Ranking: The FY19 update of the Wright Organization Partnership Score (W-OPS) is underway. This process collects and analyzes data from stakeholders across campus to identify and rank corporations who have multiple engagement points with the university. Corporations are ranked on their WSU activities in the following categories: philanthropy, research, vendor status, student recruitment, alumni employment, athletic sponsorship, college-specific activities, and advisory board service. This exercise identifies the top corporate prospects for maximum cultivation.

- **New Initiatives**

- Combined Federal Campaign (CFC): FCR has entered Wright State in the upcoming CFC, running from September 2019 through January 2020. CFC is the world's largest annual workplace charity campaign, and locally reaches the 30,000 employees at Wright-Patterson Air Force Base. This will be Wright State's first participation since 2001. Federal employees will have the opportunity to direct their donations to the Wright State University Foundation.

- **Ongoing Engagement**

- Corporate Sponsorship Opportunities: FCR is working with colleges and units to identify their most successful, well-established annual events to feature in a new sponsorship brochure. The brochure will describe approximately 30 events across campus. The goal is to produce a marketing piece that showcases the collective group of high-level events at Wright State. It will be used by development officers as a corporate engagement tool to solicit sponsorships.