

**WRIGHT STATE UNIVERSITY
BOARD OF TRUSTEES**

**Advancement Committee Report
September 2013**

1. Alumni Relations Report
2. Wright State Foundation Financial Report
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**Advancement Committee Report
Alumni Relations Report
September 2013**

Review

In the past two years, the office of alumni relations and the Alumni Association completed a new strategic plan. The results thus far include doubling the number of our alumni networks and active alumni volunteers. We currently have 17 alumni networks and over 225 alumni volunteers.

We did a complete overhaul of our website, which resulted in many more visitors and more time spent enjoying content. We have doubled the number of email newsletters we send and worked with the colleges to send alumni enewsletters on their behalf. We have implemented a tracking system for all email being sent to alumni to ensure we aren't sending multiple messages on the same day. We've quadrupled our Twitter followers and doubled our Facebook and LinkedIn followers, in addition to more than doubling our engagement of those followers.

We've seen an increase of nearly 400% in alumni donations towards Association sponsored scholarships (\$12k-\$46k). Nearly one half of our alumni networks are working on developing scholarships representing their affinity or region. Alumni now represent over 18% of the roughly \$80 million campaign total to date compared to less than 5% in the last campaign.

We've implemented new events such as Alumni College, Family Programming, Alumni Tours and Senior Week, which have engaged completely new audiences. We purposely identified segments of our alumni population we were not successfully engaging and targeted them with this new programming. We've revamped successful events and gotten rid of events that didn't pertain to our mission.

We embarked on a print and online alumni directory project that updated tens of thousands of alumni records and gave us more accurate information. We've started tracking alumni activity in detail so we can measure the engagement of each individual. This helps us more effectively target alumni for volunteers, awards, and gift prospects.

We have brought in more revenue from corporate partners than any time in the past decade. We have stemmed the financial crisis of the Association through budget cuts and increased revenue, which has resulted in financial solvency.

Future

The next year will bring about big changes in the model of how we engage alumni, with more emphasis on broad base engagement. This is all in preparation for the public phase of the campaign, set to kick off in the fall of 2014. We will continue to engage more alumni and different audiences through inventive communication and programming.

Upcoming Wright State Alumni Events

- Sept 25 - San Francisco Bay Area - Alumni Event at Google
- Sept 29 - Alumni Day at the Circus – Nutter Center
- Oct 5 - Nearly Naked Mile – Student Alumni Association Philanthropy
- Oct 10 - Cincinnati Alumni Happy Hour
- Oct 10 - Model UN Alumni Panel
- Oct 10 - Non-Profit Leadership Alliance Wine Tasting and Auction
- Oct 11 & 12 - African American Alumni All-Class Reunion
 1. Project ASPIRE – Career Exploration Fair
 2. The Game Train and Sips for Scholarships Reception
 3. Soul Food and Scholarships Dinner/Dance
- Oct 11 & 12 - Homecoming Weekend
 1. Alumni Achievement Awards
 2. Scholarship Brunch
 3. Ground Breaking of Alumni Grove
 4. Tailgate
 5. Chili Cook-off
- Oct 16 - Dayton Alumni Happy Hour
- Oct 17 - 25 - Alumni Tour to Italy
- Nov 13 - Washington D.C. Tailgate before the Georgetown Game
- Nov 16 - Chicago DePaul Basketball Game and Reception
- Dec 1-9 - Alumni Tour to Cuba

Senior Week 2013 Schedule

- Saturday, April 13 – Service Day with the Beaver Creek Wetlands Association: 9:00 a.m. – noon, noon to 3:00 p.m. or 9:00 a.m. – 3:00 p.m. Registration required.
- Monday, April 15 – Green and Gold Day: All Day. Show your Wright State Pride!
- Monday, April 15 - Senior Champagne: Rathskellar Room 4:00 p.m. – 5:30 p.m. Graduating seniors, join us for a toast to your success! Registration required.
- Tuesday, April 16 – Raider to Raider Graduates of the Last Decade panel: Discovery Room 4:30 p.m. 5:30 p.m. Talk with recent graduates about their transition from Wright State to professional life. Snacks will be provided.
- Wednesday, April 17 – Alumni Speaker Series: Discovery Room 12:00 – 1:00 p.m. Andrea Kunk ('04, '07), CFO, Peerless Technologies. Lunch will be provided.
- Wednesday, April 17 - Wright State Baseball Tailgate: Nischwitz Stadium Parking Lot at 5:30 p.m.
- Thursday, April 18 – Senior Send Off Picnic: Student Union Atrium 12:30 p.m. Come for lunch, meet Wright State alumni, and get your first alumni t-shirt!
- Thursday, April 18 - Digging in the Mud: Grassy area behind Lot 4A 6:00 p.m. Grab a team of 6 and prepare to be muddy! Please bring a cereal, dry pasta or pasta sauce to benefit Wright State University Friendship Food Pantry. Register for the event at www.imleagues.com
- Friday, April 19 – April Craze: Get Dazed with April Craze and participate in the end of the school year fun brought to you by numerous student organizations.

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

For the third time in the last four years, the Foundation’s investment returns exceeded target returns. With respect to our endowment portfolio, the investment return for FY13 was a positive 10.4%, slightly below the benchmark return of 10.5%. Five-year and since-inception returns exceeded their composite benchmark returns by sixty and twenty basis points, respectively. The endowment portfolio finished the year with a market value of \$72.6 million. Our total investment value at year end, including non-endowed portfolios exceeded \$107 million, close to the highest value we have ever recorded. Investment earnings added a net \$9.4 million in value to the portfolios in FY13. The highest performing asset classes during the year were U.S. equities (+21.7%), structured credit (+21.3%) and global equity ex-US (+16.6%).

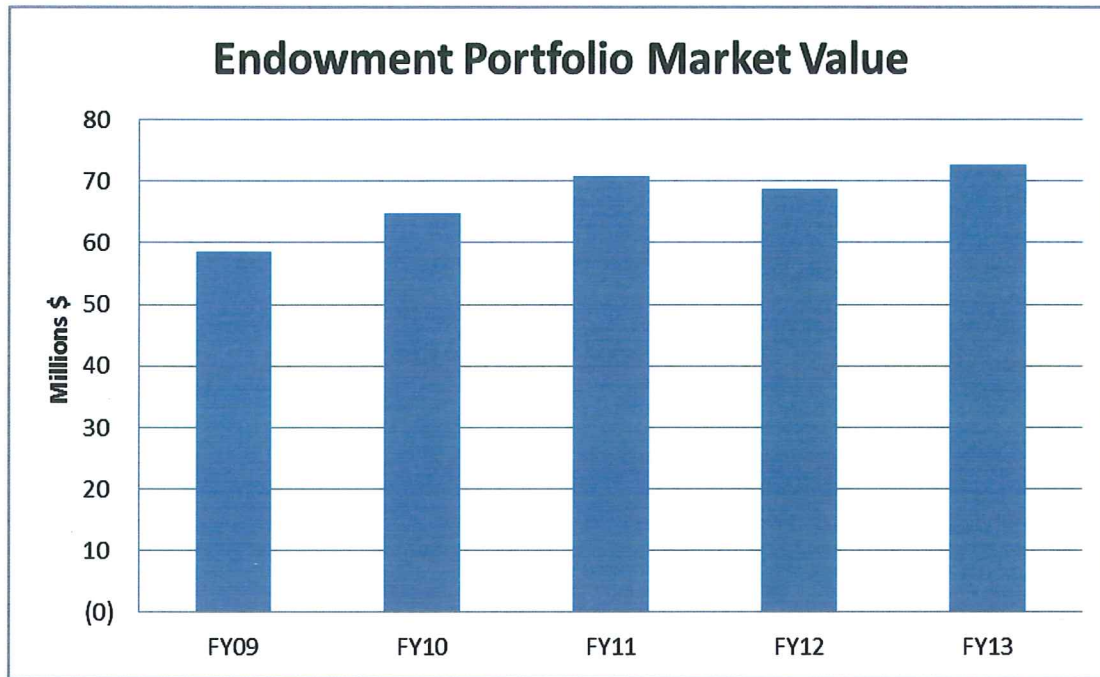
The Foundation’s portfolios were rebalanced during FY13 and allocations remained within tolerances established by our investment policy statement. Our hedge fund allocation (13% of the endowment portfolio) is now divided between two “fund of funds” products, one slightly more aggressive than the other in terms of return pursuit. Our private equity investment is now 54% funded and is generating positive returns for the endowment portfolio. The structured credit investment, while no longer providing the spectacular returns that it did a couple of years ago, nevertheless continues to be a star performer within the endowment portfolio.

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

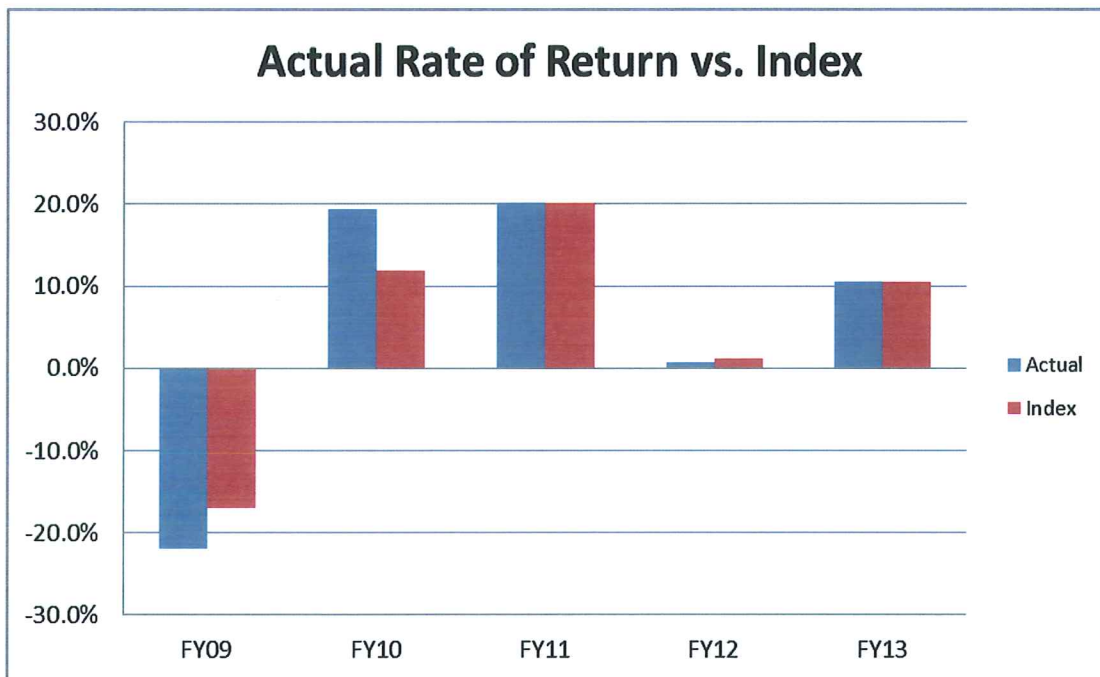
Endowment Portfolio Composition

Asset Class	Target Allocation	Actual Allocation	Market Value June 30, 2013
Equity	46%	52%	\$37,779,903
Fixed income	30%	28%	20,524,604
Hedge funds	13%	13%	9,673,184
Private equity	8%	3%	2,064,725
Structured credit	3%	4%	2,582,595
Cash & accrued income	0%	0%	256
Totals	100%	100%	\$72,625,267

Endowment Value

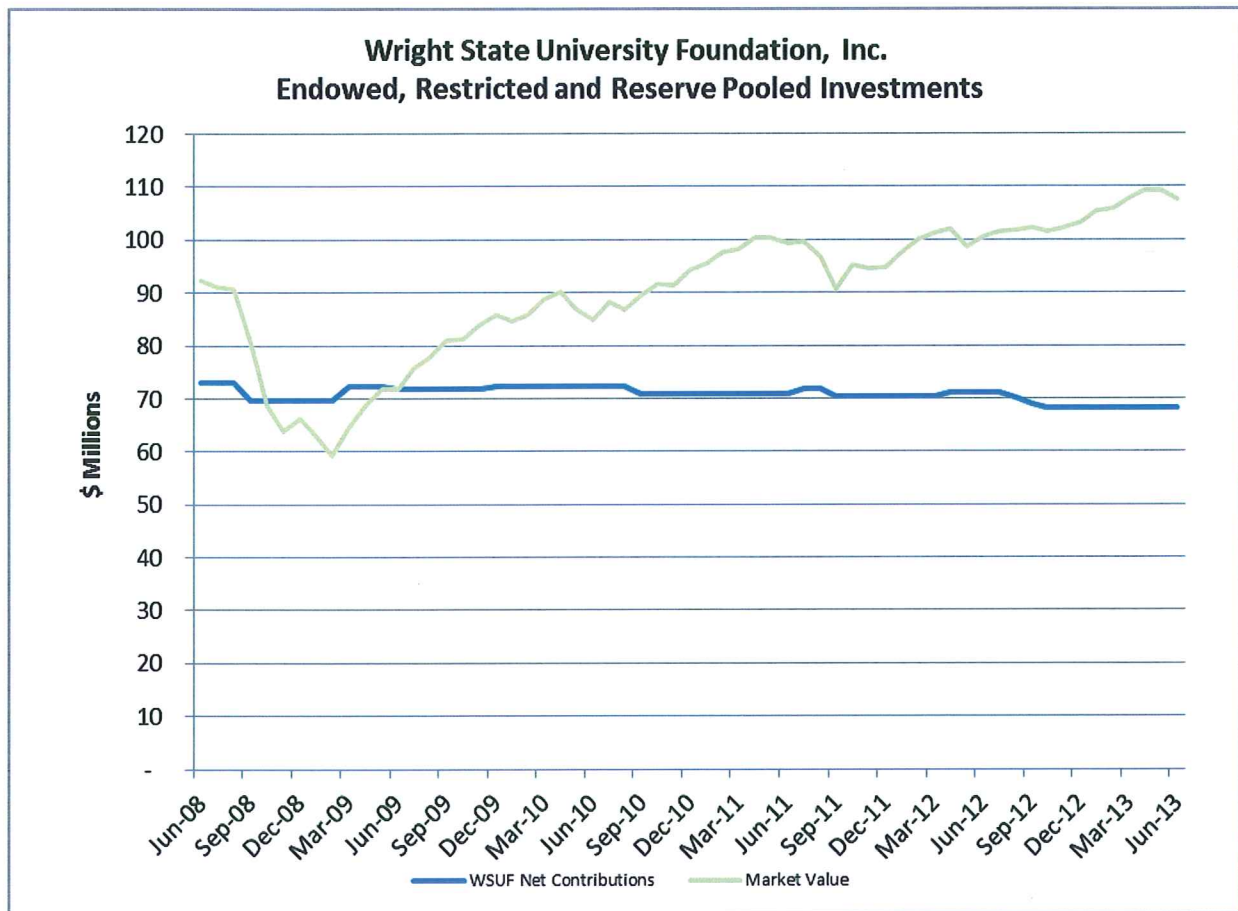


Endowment Historical Rates of Return



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 August 31, 2013

FISCAL YEAR-TO-DATE	FY2014	
	DONORS	DOLLARS
Alumni	659	\$125,165
Corporations	38	560,962
Foundations and Organizations	21	204,192
Friends	789	114,729
SUBTOTAL CASH RECEIPTS	1,507	\$1,005,048
Gifts-in-kind	3	1,500
TOTAL RECEIPTS	1,510	\$1,006,548

FISCAL YEAR-TO-DATE	FY2013	
	DONORS	DOLLARS
Alumni	511	\$307,610
Corporations	40	53,370
Foundations and Organizations	19	194,572
Friends	591	105,080
SUBTOTAL CASH RECEIPTS	1,161	\$660,632
Gifts-in-kind	23	8,855
TOTAL RECEIPTS	1,184	\$669,487

FISCAL YEAR-TO-DATE	PCT. CHANGE	
	DONORS	DOLLARS
Alumni	29%	-59%
Corporations	-5%	-951%
Foundations and Organizations	11%	5%
Friends	34%	9%
SUBTOTAL CASH RECEIPTS	30%	52%
Gifts-in-kind	-87%	-83%
TOTAL RECEIPTS	28%	50%

WRIGHT STATE UNIVERSITY FOUNDATION, INC.
Report of Total Private Support By Unit
Fiscal Year 2014 to-Date through August 31, 2013

UNIT	FY 2014 TOTAL PRIVATE SUPPORT	FY 2013 TOTAL PRIVATE SUPPORT
Boonshoft School of Medicine	\$175,645	\$83,674
College of Education and Human Services	28,265	17,480
College of Engineering and Computer Science	88,462	21,172
College of Liberal Arts	25,598	83,319
College of Nursing and Health	63,630	20,093
College of Science and Math	9,495	201,430
Curriculum and Instruction	3,395	884
Enrollment Management	11,124	20,225
Intercollegiate Athletics	41,653	1,736,395
Lake Campus	15,195	9,615
Other	120,046	58,791
Raj Soin College of Business	18,260	6,281
School of Professional Psychology	340	508
Student Affairs	23,649	35,878
University College	0	0
University Libraries	1,440	6,675
TOTALS	\$626,197	\$2,302,420

**Advancement Committee Report
Development Report
September 2013**

Planned Giving Update

FY13 Results:

We finished the Fiscal Year with 19 new planned gifts with total known value \$4,630,308. Two planned gifts were charitable gift annuities (\$150,000). One was a new donor-purchased/ Foundation-owned life insurance policy (\$150,000 face value). The remainder were bequest intentions or beneficiary designations.

Proceeds from two realized bequests totaled \$101,000. Two charitable gift annuities and one charitable remainder trust were terminated. The value of the residual funds was \$319,778.

Among the 19 planned gifts were two more \$1 million and higher bequest intentions from Wright State alumni.

As of 9/10/13, there are 13 planned gifts in discussion with a known or estimated value of \$9.5 million. There are 19 additional possible planned gifts in the early stages of discussion (with gift values yet to be determined).

Annual Giving Update

Campus Scholarship & Innovation Campaign (CSIC) (*Wright State's Faculty, Staff, and Retiree Campaign*)

The 2013 CSIC Campaign, "CSI: Wright State" has raised \$484,105 to date. Contributions from faculty, staff, and retirees will continue to be tracked until December 31, 2013, and will count toward this year's campaign. To date, 54% of full-time faculty and staff participated during the 2013 campaign. This is a new record for Wright State, which surpasses last year's participation rate of 50%.

Direct Mail/eSolicitation

The 2013 Spring Appeal raised \$68,314, the most amount of money generated by Spring Appeal. The appeal had a 5% response rate, which is higher than the typical 1% response rate associated with direct mail appeals. Spring Appeal included customized return address labels and included a special "thank you" segment to individuals who already gave during this fiscal year.

Phonathon

Wright State has initiated a partnership with Wilson-Bennett Technology to manage two seasonal phonathon campaigns. This partnership is expected to increase gift revenue from the phonathon by improving solicitation strategies, cleansing the data for more accurate contact information, maintaining a highly qualified phonathon manager, and assigning more callers per night.

The new phonathon location was prepared in the Foundation Building and has space for 20 callers per night (increased from 15). The Fall Campaign began on Saturday, September 7 and will run for seven weeks.

Student Development Officer (SDO)

The Student Development Officer program has expanded from one to eight with students representing the Graduate School, COLA, RSCOB, SOPP, COSM, and CECS. Prospects were assigned to each SDO based on the student/alumni major and college. Strategically, these students will attempt to build a relationship with alumni giving prospects through multi-media channels (print, electronic, and phone) and attempt to increase annual giving donors and dollars while building a relationship that is more personal than possible with the Phonathon.

Student Discovery Initiative

The Student Discovery Initiative is a partnership between Student Affairs and University Advancement designed to have students make “discovery” visits with Wright State Alumni. Students assigned to this initiative will be provided a list of prospects that are believed to have the potential to become major prospects in the future. Students will contact these prospects during their own time and will schedule appointments to meet with them and talk about Wright State. Students will bring Wright State materials to share with the prospects and in turn will learn more about the alum they are visiting. Students will capture updated contact, employer, and family information and will be encouraged to share how Wright State has impacted their lives.

**Advancement Committee Report
The Campaign for Wright State University
September 2013**

Comprehensive Campaign Activity

- The 2013 fiscal year end campaign total reached the anticipated goal of \$80 million. Gifts and pledges of \$80,500,735 have been accepted. This total includes a \$1MM gift in process awaiting a gift agreement signature by the donor.
- Tracking of the four donor classifications includes these totals:

Alumni	\$14,651,908*	18.4%
Friends	\$21,326,028	26.8%
Corporations	\$37,128,190	46.7%
Foundations	\$ 6,394,607	8.0%

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

- Gifts have been committed in these 4 areas:

Academic Support	\$33,700,927	96% of goal
Facility Support	\$ 8,433,991*	34% of goal
Scholarships	\$21,802,585	29% of goal
University-wide	\$15,563,229	104% of goal

(\$1MM 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.

Campaign Leadership

The campaign leadership includes:

President David and Mrs. Angelia Hopkins
Mr. Tom Hanks, National Honorary Chair
Mrs. Amanda Wright Lane, Distinguished Honorary Chair

The National Campaign Cabinet includes:

Michael* and Carolyn Adams
Ronald* and Joan Amos
Michael* and Marcia* Bridges
David* and Theresa Gasper (NEW)
Don and Gloria Graber (NEW)
Larry* and Marilyn Klaben

Don* and Cate Laden (NEW)
Donald and Amanda Wright Lane
John* and Gail Lyman
Michael* and Michelle Mathile
Gary* and Kimberly McCullough
Robert and Linda Nevin
Randy* and Cindy Phillips
Vishal and Melissa Soin
Howard and Sally Stevens
Roger* and Christine* Wallace
Robert* and Ann* Weisgarber
(*Denotes alumnus/a)

- 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:

- √ 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
- Reviewing needs for campaign public phase as follows:
 - 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 4 dates (2 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.