

**WRIGHT STATE UNIVERSITY
BOARD OF TRUSTEES**

**Advancement Committee Report
April 2015**

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

Advancement Committee Report

Alumni Relations Report

April 2015

2014 Recap: This past year has been tremendous, both in terms of raw numbers of engaged alumni and the amount of change we've instituted at the Association. The Association made the strategic decision to make all alumni members of the Association and discontinue membership dues. We aligned more closely with the University and Foundation to direct that financial support to the academic mission of Wright State and its students. This coincides with the public launch of the Rise. Shine. campaign and the Association's role in the regional events.

We continue to see record numbers of alumni attending events, following and engaging with us on social media, and giving to the university. 2014 was a record year in terms of attendees overall, first time attendees, and attendance at individual events like Homecoming. The total number of alumni donors increase by over 20% and total donations exceed \$22 million. Our Facebook followers grew by more than 400% and the engagement of alumni across all social media platforms increased significantly.

Annual Alumni Postcard Project: The post card project is an annual collaborative event with undergraduate admissions. Alumni were asked to write a personal note to a prospective student who has been admitted to Wright State, but has not fully committed. This year we had 35 alumni from three different states (North Carolina, Texas, and Ohio) write 490 post cards to students!

Senior Week: We are gearing up for our annual Senior Week 2015 Program the week before finals (April 20-24th) and through finals week. This year, we have a total of 13 programs to engage both our December 2014 Graduates and our May 2015 graduates. New programs for the year include: Life After College: Financial Future and Buying vs. Renting a house/tips for buying your first car; Senior Sneak Peeks: Seniors will get exclusive tours of the new NEC Building and Classroom Building before they open; and, Your Time to Shine Toast with President Hopkins, where President Hopkins will address the class of 2015 for one last time on the eve of graduation, sharing with our graduates that their time to SHINE is now! For a full list of activities, please visit: www.wright.edu/seniorweek

Event Updates:

- **Alumni Leaders Conference:** The first Annual Alumni Leaders Conference, held on February 28th, brought together 44 leaders of Alumni Societies and Networks for a day of discussion, education, and collaboration.
- **GDAN Happy Hour, February 27:** The Greater Dayton Alumni Network and the Alumni Association hosted a happy hour at Warped Wing Brewery in conjunction with the Alumni Leaders Conference. Over 140 people, many of them first time event attendees, participated.

- **College Outstanding Alumni Awards:** Ten honors were awarded on February 28 during the 16th annual College Outstanding Alumni Awards. 157 guests were in attendance.
- **Rowdy Gras:** An alumni favorite, over 220 guests were in attendance.

Alumni Society Fundraising Updates:

- MUN Alumni Society is collaborating with the PLS department to host a retirement party for Dr. Donna Schlagheck. As a part of their efforts, they are asking MUN alumni to make a gift to the Model United Nations Endowed Program Fund.
- Nonprofit Leadership Alliance Alumni Society will be launching an online fundraising campaign in mid-April to encourage gifts to match a \$1000 pledge for the NLAAS Scholarship fund.
- The College of Nursing and Health Alumni Society is hosting an online raffle for the use of a luxury Dayton Dragons suite. All proceeds will be donated to the CONH Alumni Society Scholarship fund.

Upcoming Wright State Alumni Events: (Find more information at wrightstatealumni.com)

- April 9 – CONH Alumni Society Education Offering: Law Update (Over 170 participants registered for this first time event)
- April 11 - Peter Pan Theatre Event (Family Friendly) Sold Out
- April 20 – 24 – Senior Week
- May 6 - Senior Showcase (New York City)
- May 9 - Houston Rise. Shine. Event
- May 13 - Cleveland Rise. Shine. Event
- May 18 - "Hire Ohio" Alumni ONLY Career Fair (Columbus)
- June 13 – Columbus Rise. Shine. Event
- June 14 - Wright State Day at the Dayton Dragons
- June 28 - Annual Columbus Zoo Alumni Outing
- July 7 - Nationals vs. Reds with Washington, D.C. Alumni Network
- July 16 - "Hire Southwest Ohio" Alumni ONLY Career Fair (Dayton)
- July 19 - Kings Island Day
- July 27 - Nonprofit Leadership Alliance Alumni Society Guest Bartender Event at Fifth Street Brew Pub in Dayton
- August 1 - Wright State Day at the Cincinnati Reds with GOLD, Dayton, and Cincinnati Networks
- August 1 - 2 - Alumni College
- August 10 - Annual Legacy Scholarship Golf Outing
- September 10 – New York Rise. Shine. Event
- September 12 - 13 - 5th Annual Bourbon Tour
- October 9-10 – Homecoming Weekend
- October 17 – Washington D.C. Rise. Shine. Event

**Advancement Committee Report
Wright State University Foundation Report
April 2015**

Volatility in the financial markets continued in the first two months of the calendar year. Our endowment portfolio suffered slight losses in January followed by strong gains in February. Overall, the portfolio has returned a positive 2.20% for the fiscal year (excluding private equity), which was slightly above its composite benchmark return of 2.17%. U.S. equity returns have been strongly positive with large cap outperforming small cap. However, international equities have been a drag on the asset class. Overall, equities have returned 2.43% for the fiscal year. Fixed income returns have also been slight at 1.52% fiscal-year-to-date. Core fixed income has had the strongest performance and emerging markets debt the weakest. Contributions to investment return by our alternative strategies have been marginal thus far. The only exception to that has been private equity, which has returned 9.76% for the year. That, in turn, has added 37 basis points to the total return figure mentioned above. Our best performing fund for the first seven months of FY15 has been the Dynamic Asset Allocation Fund.

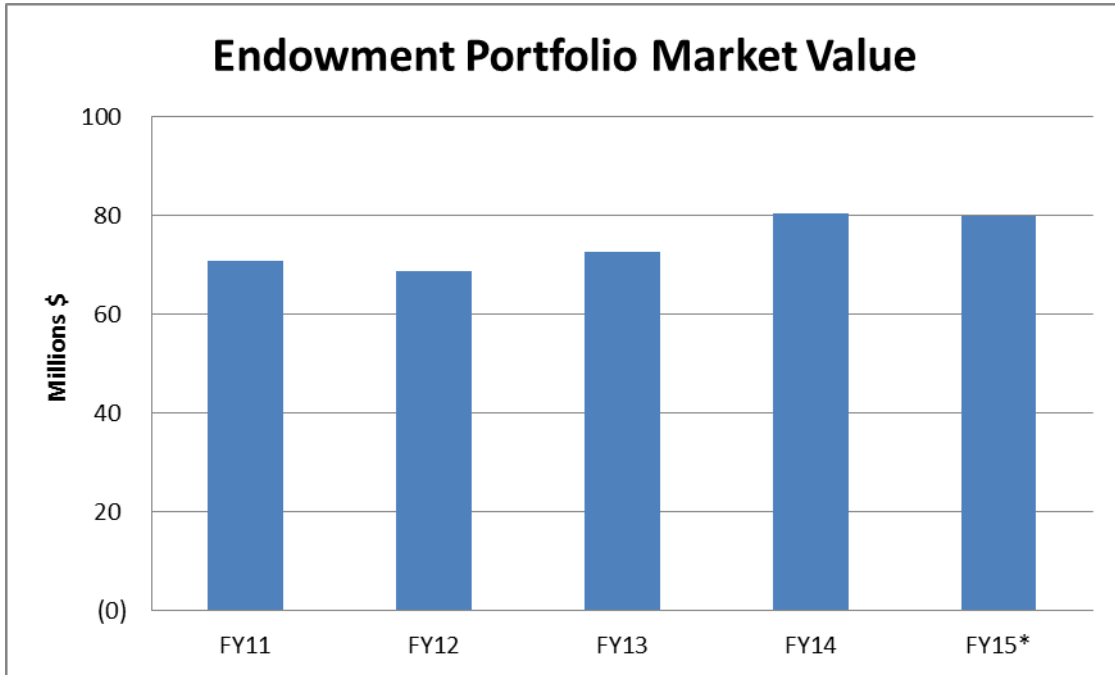
The Foundation's budget continued to strain under the pressures of expenses related to our campaign effort and the University's branding project. As of the end of February, we have spent nearly 96% of the amount budgeted for the campaign and 47% of the branding budget. Most campaign expenses relate to our kick-off event last October, although regional mini-launches continue to utilize the balance of our resources in this area. These expense pressures, coupled with underperforming revenue projections due to less-than-desired investment returns, have resulted in an erosion of our fund balance since the beginning of the fiscal year in the amount of \$1.1 million (-12%).

The Foundation's current endowment target allocation, actual allocation, and market values as of February 28, 2015, are presented below:

Endowment Portfolio Composition

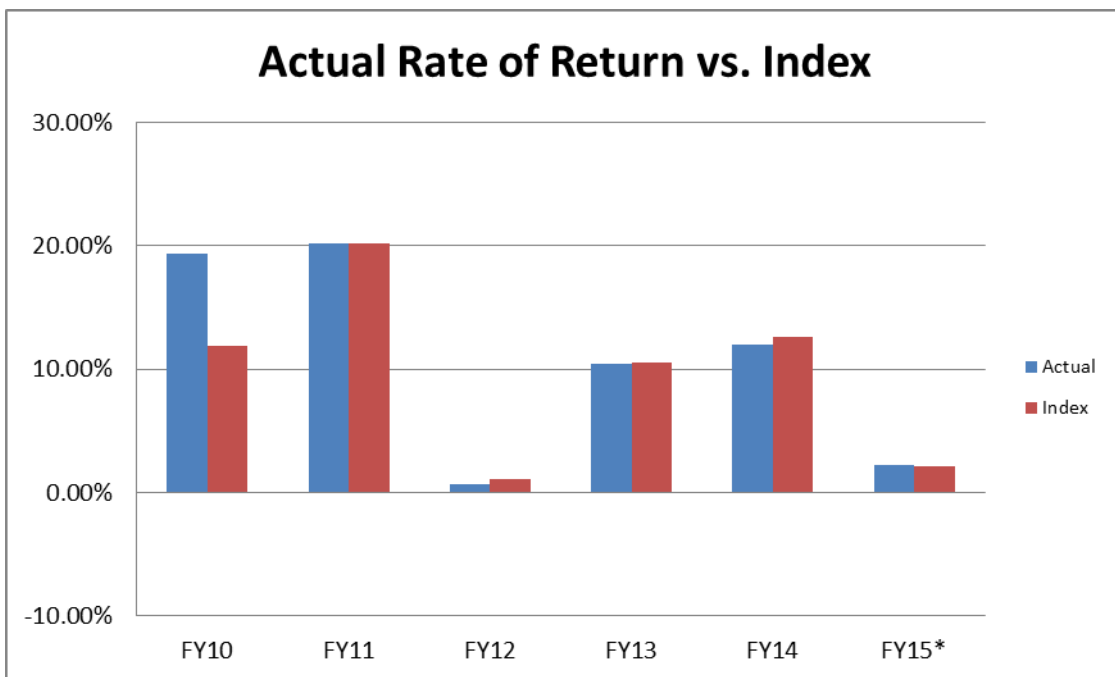
Asset Class	Target Allocation	Actual Allocation	Market Value February 28, 2015
Equity	43%	43%	\$33,959,037
Fixed income	32%	31%	24,892,591
Hedge funds	14%	13%	10,042,612
Private equity	8%	3%	2,486,244
Structured credit	3%	3%	2,785,485
Cash & equivalents	0%	7%	5,729,332
Totals	100%	100%	\$79,895,301

Endowment Value



*To February 28, 2015

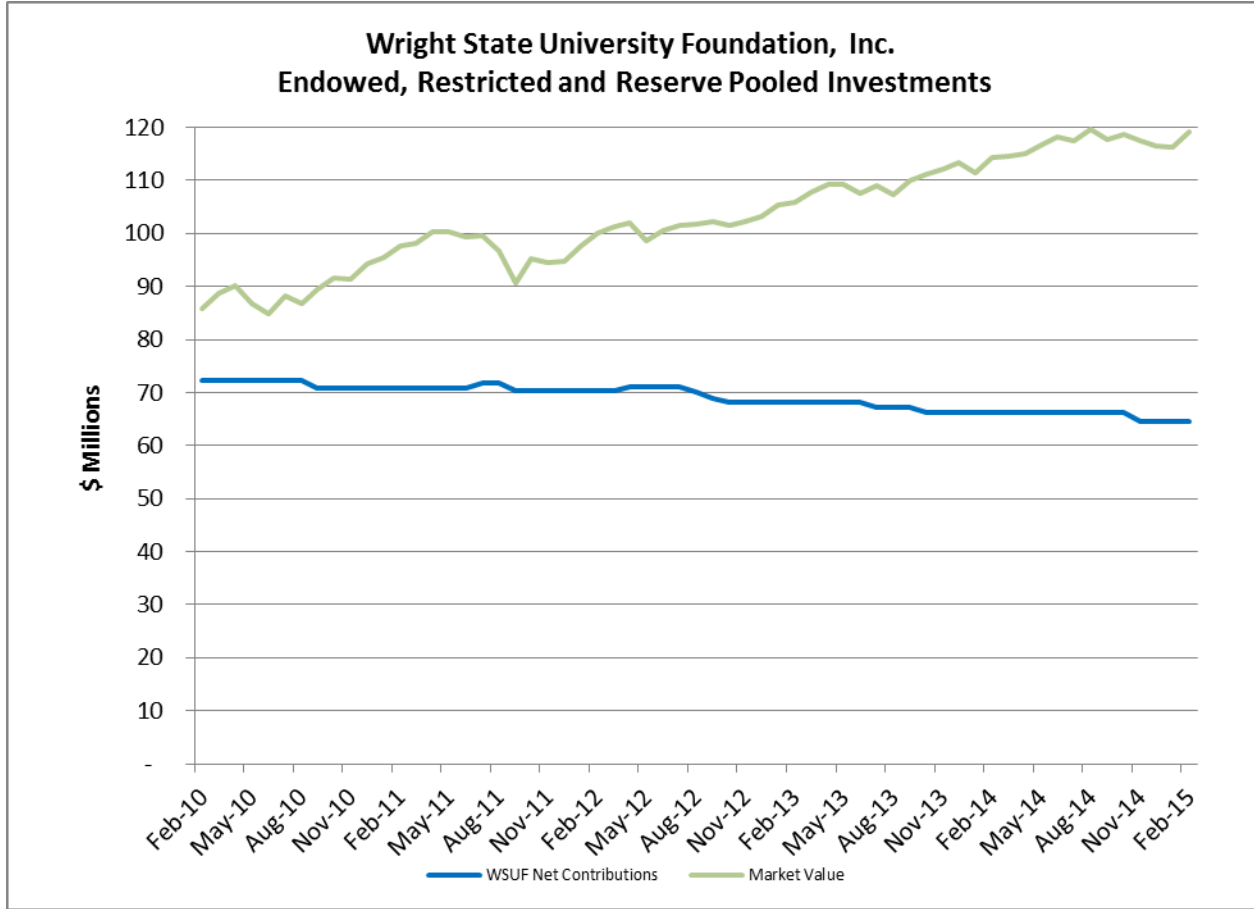
Endowment Historical Rates of Return



*To February 28, 2015

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.**Report of Total Receipts: Cash and Gifts-in-Kind
For the Month Ended March 31, 2015 and 2014****MONTH-TO-DATE**

GIFT SOURCE	MAR 2015		MAR 2014		PCT. CHANGE	
	DONORS	DOLLARS	DONORS	DOLLARS	DONORS	DOLLARS
Alumni	742	\$106,047	917	\$97,907	-19%	8%
Corporations	27	247,357	41	161,596	-34%	53%
Foundations and Organizations	13	30,182	7	15,468	86%	95%
Friends	622	61,420	629	123,178	-1%	-50%
<i>SUBTOTAL CASH RECEIPTS</i>	1,404	\$445,006	1,594	\$398,149	-12%	12%
Gifts-in-kind	49	23,910	43	831,733	14%	-97%
<i>TOTAL ALL RECEIPTS</i>	1,453	\$468,916	1,637	\$1,229,882	-11%	-62%

FISCAL-YEAR-TO-DATE

GIFT SOURCE	FY2015		FY2014		PCT. CHANGE	
	DONORS	DOLLARS	DONORS	DOLLARS	DONORS	DOLLARS
Alumni	2,543	\$1,238,935	2,864	\$713,956	-11%	74%
Corporations	233	2,115,441	243	2,172,738	-4%	-3%
Foundations and Organizations	86	644,052	75	927,892	15%	-31%
Friends	2,068	1,143,471	2,283	1,282,750	-9%	-11%
<i>SUBTOTAL CASH RECEIPTS</i>	4,930	\$5,141,899	5,465	\$5,097,336	-10%	1%
Gifts-in-kind	122	330,628	82	3,365,506	49%	-90%
<i>TOTAL ALL RECEIPTS</i>	5,052	\$5,472,527	5,547	\$8,462,842	-9%	-35%

WRIGHT STATE UNIVERSITY FOUNDATION, INC.
Report of Fundraising Totals By Source and Unit
Fiscal Year-to-Date to March 31, 2015
(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	\$519,246	\$2,457,032	\$1,227,583	\$10,295	\$1,141,000	\$5,355,156	\$3,679,766
Corporations	1,126,807	2,365,500	0	195,535	0	3,687,842	4,544,035
Foundations and Organizations	604,053	70,000	0	73,896	0	747,949	1,223,175
Friends	659,500	275,906	0	50,902	560,800	1,547,108	7,743,278
CURRENT FYTD TOTALS	\$2,909,606	\$5,168,438	\$1,227,583	\$330,628	\$1,701,800	\$11,338,055	
PRIOR FYTD TOTALS	\$2,790,258	\$1,701,205	\$81,597	\$3,365,506	\$9,251,688		\$17,190,254
% CHANGE FROM PRIOR FISCAL YEAR	4.3%	203.8%	1404.4%	-90.2%	-81.6%	-34.0%	

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	\$498,658	\$685,200	\$227,583	\$0	\$20,000	\$1,431,441	\$5,716,843
College of Education & Human Services	44,763	19,799	0	0	11,000	75,562	181,445
College of Engineering & Computer Science	136,488	2,181,640	0	0	1,000,000	3,318,128	239,095
College of Liberal Arts	341,548	289,588	0	71,840	190,000	892,976	2,943,580
College of Nursing & Health	385,084	1,225,290	0	59,528	0	1,669,902	540,601
College of Science & Math	61,245	8,860	0	0	0	70,105	123,140
Curriculum & Instruction	13,040	1,330	0	12,075	0	26,445	25,767
Enrollment Management	48,045	27,565	0	0	365,800	441,410	61,621
Intercollegiate Athletics	387,060	255,070	0	0	0	642,130	653,473
Lake Campus	135,435	1,735	0	20,969	0	158,139	220,066
Other	620,606	112,963	1,000,000	129,530	65,000	1,928,099	5,842,017
Raj Soin College of Business	156,961	349,039	0	0	0	506,000	472,530
School of Professional Psychology	12,870	515	0	0	0	13,385	8,335
Student Affairs	52,933	3,354	0	4,865	50,000	111,152	122,551
University College	530	0	0	0	0	530	770
University Libraries	14,340	6,490	0	31,821	0	52,651	38,420
CURRENT FYTD TOTALS	\$2,909,606	\$5,168,438	\$1,227,583	\$330,628	\$1,701,800	\$11,338,055	
PRIOR FYTD TOTALS	\$2,790,258	\$1,701,205	\$81,597	\$3,365,506	\$9,251,688		\$17,190,254
% CHANGE FROM PRIOR FISCAL YEAR	4.3%	203.8%	1404.4%	-90.2%	-81.6%	-34.0%	

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 April 2015

Planned Giving Update

As of March 30, 2015, there have been nine new and one re-characterized planned gift commitments made this fiscal year. Their projected value is \$2,929,383. As reported previously, two of the gifts were new life insurance policies taken out by the Foundation, but donated by alumni. The remainder are bequests or beneficiary designations.

There are an additional 10 planned gifts in discussion with an estimated projected value of \$5,810,000 million, and 32 planned gifts that are in early stage discussions with unknown projected values at this time.

A direct mail marketing piece is being prepared to go to alumni, faculty and staff, and friends of the University promoting charitable gift annuities in May.

Annual Giving Update

Annual gift solicitation (gifts of up to \$10,000) will be more significant during the broad-base appeals made during the public phase of the Rise. Shine. Campaign. Besides enabling the broad constituency base to participate in the Campaign and build toward reaching its overall financial goal, this effort will build the platform for future fundraising efforts by engaging more donors, increasing current individual giving levels, and identifying new major gift prospects.

Fall Direct Mail Appeal

The annual fall direct mail appeal began on October 24 following the end of the Fall Phonathon Campaign and public launch of the Campaign. It was customized with students in each academic area who received the appeal and branded with the Campaign's *Rise. Shine.* markings.

New initiatives included:

- Suggested giving amounts
- Encouraged donors to jump up to the next giving society
- We included the Wright State University Alumni Association scholarship appeal

60-Day Results

- \$57,661 from 324 donors compared to 60-Day results FY14 \$30,701 from 232 donors.

90-Day Results

- \$61,846 from 356 donors compared to the 90-Day results FY14 \$32,896 from 250 donors

Spring Phonathon – February 7 – April 2

Phonathon concluded on Thursday, April 2; official reporting is being conducted - preliminary results: \$109,879 from 1524 donors

During Phonathon, there was a strong emphasis put on pledge fulfillment. The Phonathon manager enforced stronger pledge verifications to ensure a large fulfillment rate.

- Fulfillment Rate for Fall is 74.5%

New initiatives included:

- Rise. Shine. Campaign Messaging will be incorporated into all calling segments
- Additional calling segments have been added compared to Spring 2014
 - Alumni Association membership
 - Increased alumni affinity – 13 affinities identified
 - Alumni non-donors who have attended at least one university event in the last five years
 - Alumni non-donors with an annual giving likelihood Blackbaud score of 600 or more

Strategies moving into FY16

- Two additional weeks during fall and spring Phonathon
- Evaluating energy spent on non-donors who have received calls from WSU over the last four Phonathon campaigns and continually decline to make a gift

2015 CSIC

The annual faculty staff campaign launched on Thursday, February 26th. Results through week 5: \$311,321, 40% participation. The nine week campaign will conclude May 1.

Retiree strategy includes a direct mail campaign this spring as well as fall Phonathon calling segment. Additionally, there is an \$8,000 match from three donors and the Retiree Association board. Matches will be matched dollar to dollar for any new or increased gift from 2014.

2014 CSIC results are calculated through December 31, 2014: 2014 CSIC raised \$842,678, 60% participation.

Spring Appeal

Spring appeal is scheduled to go out in mid-May

New initiatives include non-donors from three segments; historically, non-donors have not been part of Spring Appeal. Non-donor categorized as anyone who has not made a gift since 2008:

- Alumni Association Membership
- Affinity Segment – 13 affinities identified
- Wright State non-donor event attendees in the past 5 fiscal years

Student Giving

February was Student Engagement and Philanthropy Month (SEP) in partnership with CASE. Institutional members will organize events and activities throughout February to enhance awareness and engagement of students in higher education advancement.

Throughout the month of February, student organizations, as well as campus teams who sign up, were fundraising, competing with one another to see which team could raise the most funds. All funds support WSU Foundation funds. We concluded with a student event, Tunnel Takeover, a 5K walk for \$5K on February 26th. We look forward to expanding this event in future years.

Advancement Committee Report
Rise. Shine. *The Campaign for Wright State University*
April 2015

Comprehensive Campaign Activity

- Gifts and pledges of \$111,715,333 have been accepted as of 2/28/2015
- Tracking of the four donor classifications includes these totals:

Alumni	\$23,668,003	21.2%
Friends	\$32,473,232	29.1%
Corporations	\$47,235,245	42.3%
Foundations	\$ 8,337,952	7.5%

- Gifts have been committed in these three areas:

Individuals	\$37,959,153	(students and their success)
Environments	\$38,890,208	(capital projects)
Innovations	\$34,865,971	(programmatic investments)

Fiscal Year-End Goal: \$125,000,000

Campaign Impact to Date:

- Gifts have been received from 13,700 friends, and 10,800 alumni
- 26,242 individual gifts have been received
- In calendar year 2014, sixty percent of our faculty/staff gave \$862,000!
- First-time gifts to Wright State made up \$14.6 million of the total
- We've made 27,957 contacts including 7,294 personal visits
- We've advanced 956 proposals totaling \$86 million in asks
- 292 new scholarships have been established
- 6 new endowed professorships or lectureships have been created

Campaign Emphasis:

- Mini-launch events in key geographies
- Promoting the Archives project and securing a lead naming gift
- Generating new scholarship funds
- Raising funds for the Neuroscience Engineering Collaboration Building, Creative Arts Center, and the Student Success Center Building
- Securing new endowed chair and professorship gifts