

**WRIGHT STATE UNIVERSITY  
BOARD OF TRUSTEES**

**Advancement Committee Report  
November 2015**

1. Alumni Relations Report
2. Wright State Foundation Financial Report
3. Development Report
4. Comprehensive Campaign Report
5. Communications and Marketing Report

**Advancement Committee Report  
Alumni Relations Report  
November 2015**

Event Updates:

**Homecoming:** Alumni events on Friday, Oct. 9 and Saturday, Oct. 10 had a total event attendance of 1,220. Last year's total attendance for the same events was only 875. Some of the highlighted events with attendance numbers are listed below:

Oct 9<sup>th</sup>

- Organizational Leadership Alumni Wine Tasting/Networking Event - 50
- Annual Alumni Association Achievement Awards (by invitation only) - 104
- CEHS Trivia Night - 287

Oct 10<sup>th</sup>

- Alumni Association Scholarship Brunch (by invitation only) - 67
- Homecoming Festival overall attendance – 700

Alumni were also able to participate virtually through a social media Virtual Alumni Homecoming Court app. Couples who are Wright State wed to wed were able to enter the contest, all alumni and friends were able to vote for their favorite Wright State couple.

**Rise.Shine mini launches:** 6 of 7 Rise.Shine mini launches have been completed this year with over 550 attendees and lots of great feedback from alumni who were glad that the campaign was brought to their community. Rise.Shine. Cincinnati will be hosted at Music Hall on November 13 with an anticipated attendance of 150.

**Alumni Network and Society Scholarship Fundraising Updates:**

- We currently have 20 networks and societies. This number has more than doubled in the past five years. Of those 20, half currently have a scholarship or are raising money to start a scholarship.
- **Social Work Alumni Society:** Social Work Alumni Society held their annual Beer tasting/silent auction on Sept. 9 and raised \$2,264 for their already endowed scholarship fund.

**Alumni Communication:**

- We are working on a redesigned and responsive website that should be launched in early 2016.

- We will be conducting an alumni survey to measure the effectiveness of our marketing, communication, and events. Questions are currently being developed and the audience sample is being determined.

**Upcoming Wright State Alumni Events:** (Find more information at [wrightstatealumni.com](http://wrightstatealumni.com))

- Nov. 4 – 2015 Meet the Teams
- Nov. 7 – GOLD/FSAS Walking Brew Tour, Oregon District
- Nov. 7 – CONH Alumni and Donor Reception
- Nov. 12 – Lake Campus Celebrity Waiter Night, Bella’s
- Nov. 13 – Cincinnati Rise.Shine., Music Hall
- Nov. 19 – Cleveland Happy Hour, Saponi Italian Grille
- Nov. 20 – Wright State Men’s Basketball vs. UK pregame tailgate
- Dec. 5 – Wright State Alumni Day Trip to Chicago (Lake Campus)
- Dec. 8 – Wright State Men’s Bball vs. Xavier pregame Happy Hour
- Dec. 14 – SWAS Holiday Party
- Dec. 17 – NLAAS Holiday Party
- Dec. 17 – Senior Night at Wright State Men’s Basketball
- Dec. 19 – Cleveland Happy Hour, Johnny’s Bar on Fulton
- Jan. 16 – Alumni Day at the Game
- Jan. 16 – AAAS Annual Meeting
- Jan. 21 - CONH Alumni Society Wine Tasting
- Feb. 20 – Annual Beer tasting
- Feb. 27 – Rowdy Gras
- March 5-8 Men’s Basketball Horizon League Tournament
- March 10 – CONH Alumni Society CEU
- Aug. 6-7 – Alumni College
- Aug. 29 – Legacy Scholarship Golf Outing, Walnut Grove Country Club

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

Volatility in the financial markets led to significant losses in the Foundation’s endowment portfolio during the first quarter of FY16. August and September were especially brutal as the portfolio returned a negative 5.44% for the period. The return lagged its composite benchmark by 37 basis points. Private equity returns added 38 basis points to the overall return for the quarter resulting in a total loss of 5.06%. Equities lost nearly nine percent during the quarter, with U.S. securities outperforming non-U.S. shares. Large cap equities outperformed small cap. Fixed income and alternative assets both produced total losses of just over 1%, with private equity and one of our hedge funds earning positive returns. Two of our multi-asset strategy funds also countered larger losses experienced in other parts of the portfolio. Long-term returns continued in the black, although all below the stated target return of the portfolio (8%). The endowment portfolio ended the quarter with a market value of \$74.9 million. Portfolio allocations approved by the Foundation’s Investment Committee late last year were nearly complete by the end of September; full execution of the reallocation is expected shortly.

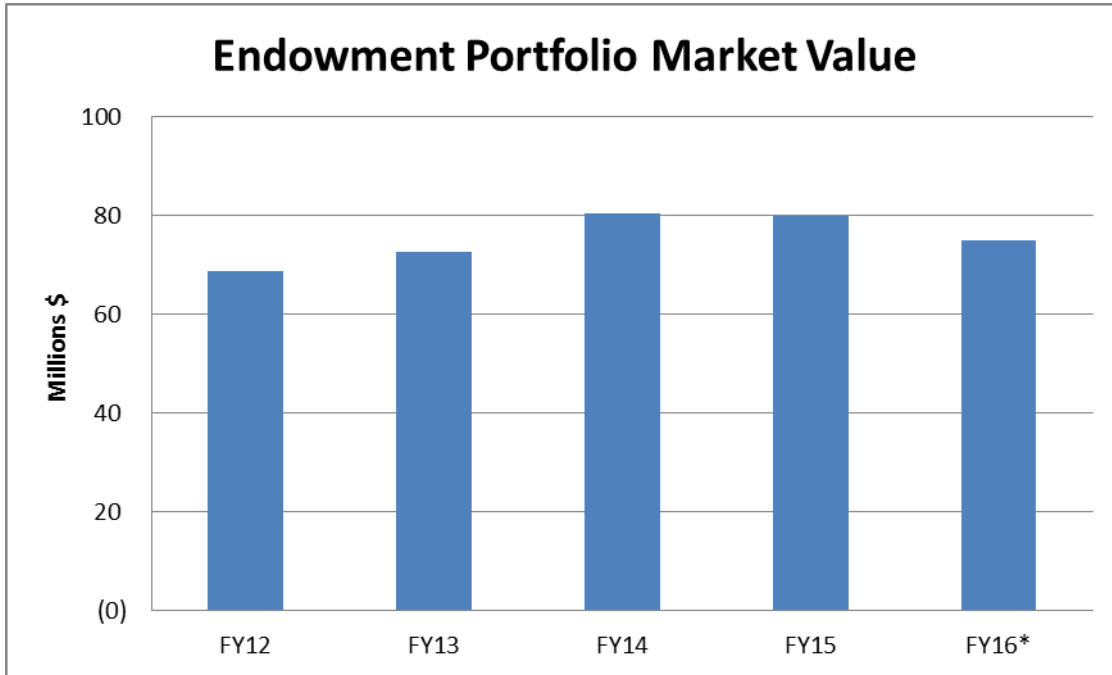
Like the endowment portfolio, the Foundation’s unrestricted net asset position suffered significant losses during the quarter, as well. This was on the heels of an 18% loss in FY15. We view our unrestricted net assets as our reserve; it allows us to react to contingencies and to respond positively to requests for funding by the University. The reserve ended the quarter at just under \$6 million after losing \$1.6 million for the period. Most of the loss relates to negative investment returns. Fortunately, losses can be reversed and we are hopeful that will be the case before the fiscal year closes. However, our ability to react to contingencies and requests for funding was greatly restricted at the end of the quarter.

The Foundation’s current endowment target allocation, actual allocation, and market values as of September 30, 2015, are presented below:

**Endowment Portfolio Composition**

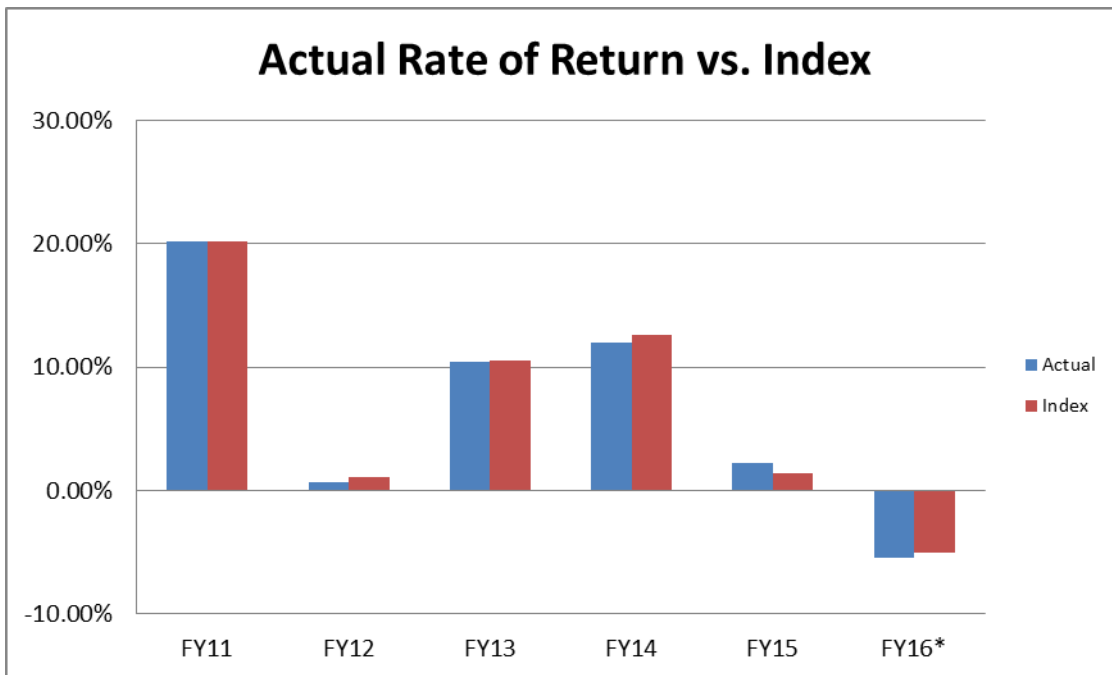
<b>Asset Class</b>	<b>Target Allocation</b>	<b>Actual Allocation</b>	<b>Market Value September 30, 2015</b>
<b>Equity</b>	<b>54%</b>	<b>46%</b>	<b>\$34,949,631</b>
<b>Fixed income</b>	<b>23%</b>	<b>28%</b>	<b>20,774,684</b>
<b>Hedge funds</b>	<b>8%</b>	<b>14%</b>	<b>10,449,976</b>
<b>Private equity</b>	<b>8%</b>	<b>4%</b>	<b>2,824,514</b>
<b>Structured credit</b>	<b>3%</b>	<b>4%</b>	<b>2,863,479</b>
<b>Energy Debt</b>	<b>4%</b>	<b>4%</b>	<b>3,043,754</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>\$74,906,038</b>

**Endowment Value**



\* Through September 30, 2015

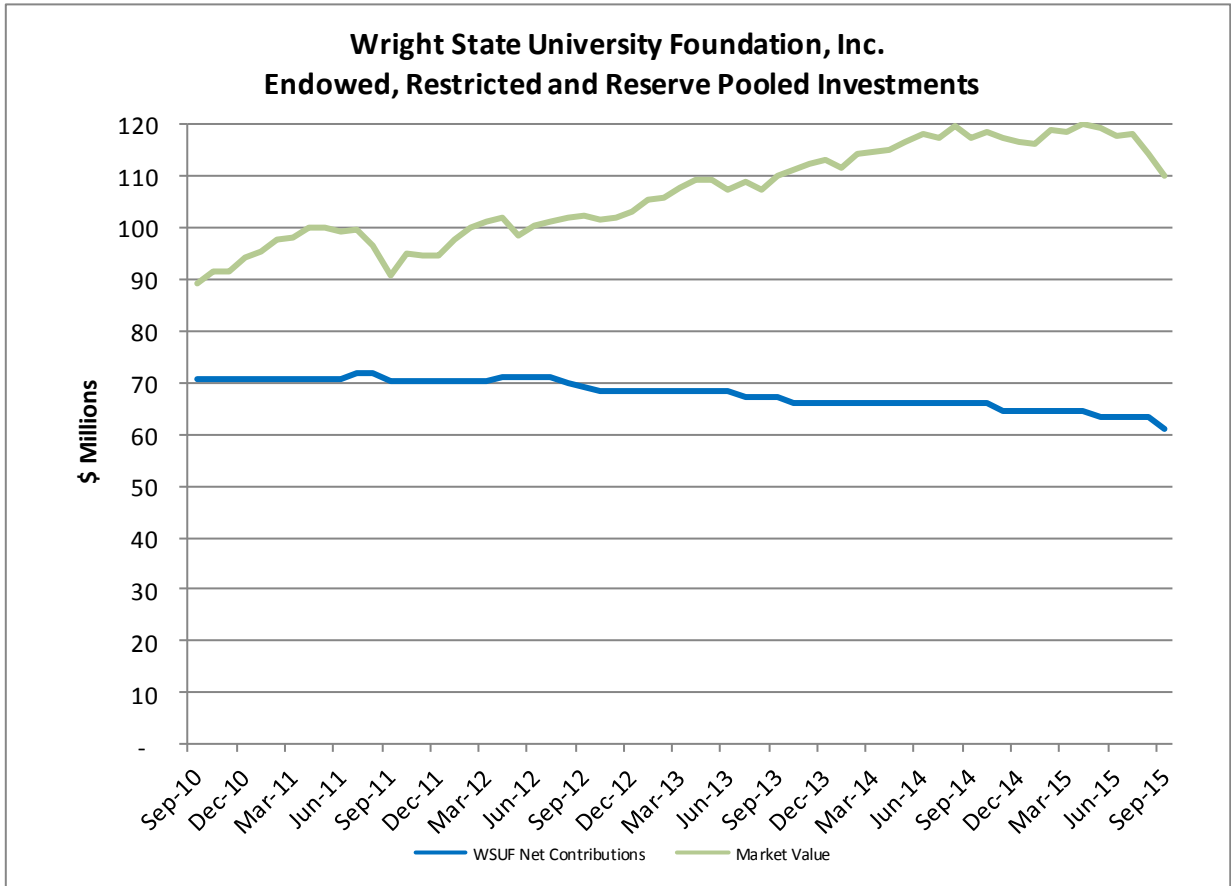
**Endowment Historical Rates of Return**



\* Through September 30, 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 September 30, 2015 and 2014

**MONTH-TO-DATE**

GIFT SOURCE	SEP 2015		SEP 2014		PCT. CHANGE	
	DONORS	DOLLARS	DONORS	DOLLARS	DONORS	DOLLARS
Alumni	462	\$312,186	543	\$69,204	-15%	351%
Corporations	31	656,474	30	227,394	3%	189%
Foundations and Organizations	7	31,959	6	14,997	17%	113%
Friends	427	121,097	424	69,559	1%	74%
<b>SUBTOTAL CASH RECEIPTS</b>	<b>927</b>	<b>\$1,121,716</b>	<b>1,003</b>	<b>\$381,154</b>	<b>-8%</b>	<b>194%</b>
Gifts-in-kind	4	5,352	6	647	-33%	727%
<b>TOTAL ALL RECEIPTS</b>	<b>931</b>	<b>\$1,127,068</b>	<b>1,009</b>	<b>\$381,801</b>	<b>-8%</b>	<b>195%</b>

**FISCAL-YEAR-TO-DATE**

GIFT SOURCE	FY2016		FY2015		PCT. CHANGE	
	DONORS	DOLLARS	DONORS	DOLLARS	DONORS	DOLLARS
Alumni	766	\$512,834	813	\$154,864	-6%	231%
Corporations	73	963,043	62	875,675	18%	10%
Foundations and Organizations	13	87,644	24	182,126	-46%	-52%
Friends	735	257,954	737	192,313	0%	34%
<b>SUBTOTAL CASH RECEIPTS</b>	<b>1,587</b>	<b>\$1,821,475</b>	<b>1,636</b>	<b>\$1,404,978</b>	<b>-3%</b>	<b>30%</b>
Gifts-in-kind	8	1,350,837	16	35,882	-50%	3665%
<b>TOTAL ALL RECEIPTS</b>	<b>1,595</b>	<b>\$3,172,312</b>	<b>1,652</b>	<b>\$1,440,860</b>	<b>-3%</b>	<b>120%</b>

**WRIGHT STATE UNIVERSITY FOUNDATION, INC.**

**Report of Fundraising Totals By Source and Unit**

**Fiscal Year-to-Date to September 30, 2015**

(including totals from prior fiscal year)

**BY SOURCE**

SOURCE	CASH <sup>1</sup>	PLEDGES <sup>2</sup>	IRREVOCABLE DEFERRED GIFTS <sup>3</sup>	GIFTS OF PROPERTY <sup>4</sup>	REVOCABLE DEFERRED GIFTS <sup>5</sup>	CURRENT FYTD	PRIOR FYTD
						TOTALS	TOTALS
Alumni	\$158,254	\$130,772	\$0	\$1,680	\$2,500,000	\$2,790,706	\$310,574
Corporations	298,193	390,000	0	1,349,045	0	2,037,238	958,164
Foundations and Organizations	87,644	0	0	90	0	87,734	202,221
Friends	177,008	3,331	0	22	0	180,361	339,599
<b>CURRENT FYTD TOTALS</b>	<b>\$721,099</b>	<b>\$524,103</b>	<b>\$0</b>	<b>\$1,350,837</b>	<b>\$2,500,000</b>	<b>\$5,096,039</b>	
<b>PRIOR FYTD TOTALS</b>	<b>\$865,318</b>	<b>\$604,358</b>	<b>\$0</b>	<b>\$35,882</b>	<b>\$305,000</b>		<b>\$1,810,558</b>
<b>% CHANGE FROM PRIOR FISCAL YEAR</b>	<b>-16.7%</b>	<b>-13.3%</b>	<b>N/A</b>	<b>3664.7%</b>	<b>719.7%</b>	<b>181.5%</b>	

**BY UNIT**

UNIT	CASH <sup>1</sup>	PLEDGES <sup>2</sup>	IRREVOCABLE DEFERRED GIFTS <sup>3</sup>	GIFTS OF PROPERTY <sup>4</sup>	REVOCABLE DEFERRED GIFTS <sup>5</sup>	CURRENT FYTD	PRIOR FYTD
						TOTALS	TOTALS
Boonshoft School of Medicine	\$86,351	\$37,700	\$0	\$0	\$0	\$124,051	\$707,733
College of Education & Human Services	9,690	1,540	0	0	0	11,230	15,267
College of Engineering & Computer Science	80,797	325	0	0	0	81,122	46,123
College of Liberal Arts	14,238	2,560	0	1,580	0	18,378	268,431
College of Nursing & Health	55,205	30,555	0	0	0	85,760	282,130
College of Science & Math	17,360	20,862	0	1,349,045	2,000,000	3,387,267	11,530
Curriculum & Instruction	3,583	25	0	0	0	3,608	16,452
Enrollment Management	7,442	0	0	0	0	7,442	29,753
Intercollegiate Athletics	105,877	1,001	0	0	0	106,878	79,846
Lake Campus	500	390,025	0	0	0	390,525	40,871
Other	214,332	37,485	0	0	500,000	751,817	174,681
Raj Soin College of Business	74,155	1,630	0	0	0	75,785	57,962
School of Professional Psychology	4,000	295	0	0	0	4,295	5,400
Student Affairs	43,469	0	0	212	0	43,681	65,274
University College	100	0	0	0	0	100	530
University Libraries	4,000	100	0	0	0	4,100	8,575
<b>CURRENT FYTD TOTALS</b>	<b>\$721,099</b>	<b>\$524,103</b>	<b>\$0</b>	<b>\$1,350,837</b>	<b>\$2,500,000</b>	<b>\$5,096,039</b>	
<b>PRIOR FYTD TOTALS</b>	<b>\$865,318</b>	<b>\$604,358</b>	<b>\$0</b>	<b>\$35,882</b>	<b>\$305,000</b>		<b>\$1,810,558</b>
<b>% CHANGE FROM PRIOR FISCAL YEAR</b>	<b>-16.7%</b>	<b>-13.3%</b>	<b>N/A</b>	<b>3664.7%</b>	<b>719.7%</b>	<b>181.5%</b>	

<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.



**Advancement Committee Report  
Development Report  
November 2015**

**Planned Giving Update**

Results for FY2015

A total of 18 new planned gift commitments were secured in FY15 for a projected gift value of \$3,489,383. Included was one charitable gift annuity and one new life insurance policy. The remainder are bequests.

An additional 11 planned gifts are in discussion with an estimated projected value of \$4,160,000. There are 33 more potential planned gifts that are in early stage discussion.

**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 Phonathon – September 12 – November 12**

The nine-week campaign began on September 12. Students will be trained and make calls seven days a week (with double sessions on the weekend) to reach a goal of \$395,000 this fiscal year. For the third year the services of consultant Wilson- Bennett Technologies are being employed to manage this year's two Phonathon campaigns. Phonathon raised nearly \$265,000 in FY15 with an improved fulfillment rate of 75%, which is up about 10% over FY14.

Strategies moving into FY16

- Two additional weeks during fall and spring Phonathon
- In the spring the call center will not call during spring break as in the past it has not netted much
- 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

**Fall Direct Mail Appeal**

The annual fall direct mail appeal will begin on October 30. It will be customized with students in each academic area who received the appeal and branded with the Campaign's *Rise. Shine.* markings.

New initiatives included:

- Encouraged donors to jump up to the next giving society
- Strategic donor amounts suggested based on their previous giving history

### **Phonathon and Fall Appeal – Multi-Channel Strategy**

New in FY16 will be a multi-channel approach for identified segments. Three segments in the fall will pilot our multi-channel strategy: Accountancy, Lake Campus and Alumni Association. Fall appeal direct mail for these segments dropped on October 12, and Phonathon began its calls to these segments on October 22 with very specific scripting related to the mail piece.

### **2015 CSIC**

FY15 results \$523,138, an increase of nearly \$23,500 compared to FY14 at the end of the fiscal year. In addition, at the end of the fiscal year 2015 participation was 57% from full time faculty and staff.

2015 CSIC results will be calculated through December 31, 2015: 2014 CSIC raised \$842,678, 60% participation.

### **Student Giving**

Increasing student understanding of philanthropy and student giving to Wright State will receive particular emphasis again this academic year.

In 2015/2016, we will continue to build our GivingTuesday and Tunnel Takeover activities to increase student philanthropy at Wright State. #GivingTuesday will take place on Tuesday, December 1 with a similar approach to 2014, alumni giving campaign and an on campus event targeted towards the education of philanthropy with our students with a fun event during the lunch time on the 1<sup>st</sup>.

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

**Comprehensive Campaign Activity**

- Gifts and pledges of \$121,453,121 have been recorded as of 9/30/2015. An additional \$3.2 million is awaiting gift agreement signatures—verbally committed
- Current presidential ask proposals total \$85+ million
- College/school proposals outstanding represent \$36 million in asks
- Tracking of the four donor classifications includes these totals:

Alumni	\$27,644,734	22.8%
Friends	\$33,171,919	27.3%
Corporations	\$49,826,329	41.0%
Foundations	\$10,810,139	8.9%
- Gifts have been committed in these three areas:

Individuals	\$40,484,340	(students and their success)
Environments	\$40,868,751	(capital projects)
Innovations	\$40,100,031	(programmatic investments)

**FY '16 Year-End Goal:** \$150,000,000

**Campaign Impact to Date:**

- 27,928 individual gifts have been received (also includes foundations & corporations)
- Boonshoft School of Medicine has raised in excess of \$20 million!
- First-time gifts to Wright State were received from 14,859 donors

**Campaign Emphasis:**

- One remaining campaign launch in Cincinnati on 11/13/15 at Music Hall
- Analyzing the successes of each launch site to measure how many new contacts have been made and how many total gifts have been raised from each region
- Initial analysis demonstrates over \$26 million has been raised from regional locations!!
- Developing strategies to keep alumni involved on a long-term basis
- President's Campaign Cabinet meeting on 11/13/15 in Cincinnati

**Tom Hanks Visit:**

- Collaborating with the Hanks' team to secure spring dates for his campus visit
- Planning a multiple-day visit with Wright Brothers experiences and University experiences