

**WRIGHT STATE UNIVERSITY  
BOARD OF TRUSTEES**

**Advancement Committee Report  
March 2016**

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

# **Advancement Committee Report Alumni Relations Report March 2016**

## **Annual Report:**

The 2015 annual reports are complete and should be in route to the University Board of Trustees. Highlights include an increase in over 1,000 people at our various events, a 100% increase in Homecoming participation, and a 30% increase in alumni giving.

## **Communications Update:**

We launched a new website on January 28, 2016. Since the launch we've had 8,075 unique visitors who have viewed 19,381 pages. Based on Google Analytics 57% of those visitors are new, while 42% are returning visitors from our old website.

## **Event Updates:**

### **Rowdy Gras, Feb. 27**

- 290 attendees
- Our largest Rowdy Gras event to date

### **Resume Review (online), March 7**

- 39 students connected with 7 alumni experts to have their resumes reviewed online. It was the first of its kind event at Wright State and something we hope to do more of in the future.

### **Horizon League Men's Basketball Tournament, March 5 - 8**

- Inaugural year for the Motor City Madness tournament in Detroit, MI
- WSUAA held 4 pregame tailgates during the tournament. One 90 minute event prior to each tournament game played.
- An average of 45 attendees at each tailgate. Audience was alumni, family of team members, university guests, Raider fans
- WSUAA will participate in the Motor City Madness tournament in future years. We may consider hosting additional meet ups as well as tailgates.

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

- March 31 – GDAN Happy Hour
- April 2 - Bowling with Alumni
- April 7 – Information interviews (online) with CECS alumni and students
- April 11 – Raise your Brush, Wright State Spirit Edition
- April 13 – LGBTQ and Ally Alumni Society Lavender Reception
- April 26 - \$2 Pint Night with Alumni and Seniors
- April 28 – President Champagne Toast (Senior Week program)

- April 28 – GOLD Financial Education Happy Hour
- June 11 – Cedar Point Day
- June 26 – Wright State Day at the Dayton Dragons
- Aug. 6-7 – Alumni College
- Aug. 7 – Kings Island Day
- Aug. 29 – Legacy Scholarship Golf Outing, Walnut Grove Country Club
- Sept 24 – 25 – Annual Bourbon Trip
- Sept. 26 – Wright State Debate Alumni Watch parties (regional and local sites)
- Sept. 30 – Oct. 1 – Homecoming

**Advancement Committee Report  
Wright State University Foundation Report  
March 2016**

Since our last report financial markets have plunged resulting in extensive, albeit unrealized, losses to the Foundation’s endowment portfolio. For the first eight months of the fiscal year, the portfolio has lost nearly 8.5% and has underperformed its benchmark by 134 basis points. The only good news has been the relatively small losses in February and the moderate gains in early March. Longer-term return rates have likewise underperformed their benchmarks and are well below our stated target return of 8%. All of our asset classes have experienced losses for the year; however three of our individual funds have managed slightly positive returns for the same period. Fixed income has outperformed equities and large cap equities have outperformed small cap securities. Domestic stocks have outpaced international equities. Private equity investments have added 74 basis points to our return during the year. Our recent investment in energy sector distressed debt has suffered from depressed prices in the oil market. Other alternatives (except for private equities) have also suffered losses for the year. The value of the endowment portfolio was \$72.8 at the end of February, which was down \$7.1 million (including liquidations) since the start of the fiscal year.

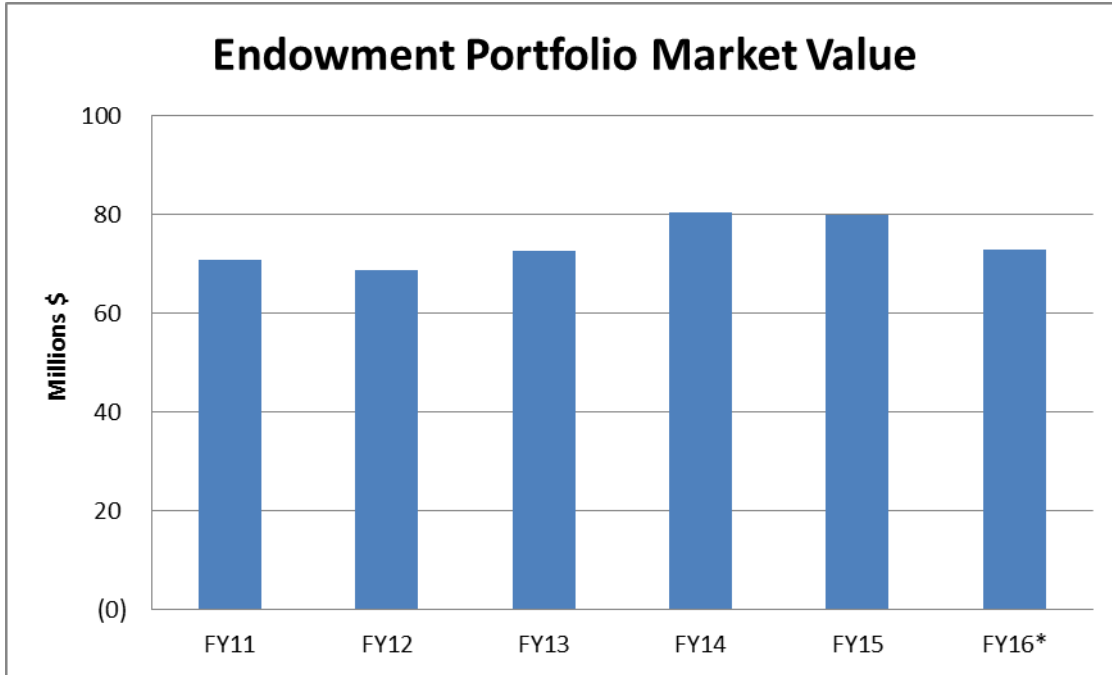
Losses in our non-endowed portfolios have reduced the Foundation’s financial position and ability to react to strategic needs of the University. The Foundation’s unrestricted net assets balance (which we use as proxy for our reserve) has declined 35% during the year and ended the month of February at just under \$5 million. The Foundation’s commitments to the University’s branding initiative, the Rise. Shine. Campaign and the Tom Hanks events will further stress our reserve.

The Foundation’s current endowment target allocation, actual allocation, and market values as of February 29, 2016, are presented below:

**Endowment Portfolio Composition**

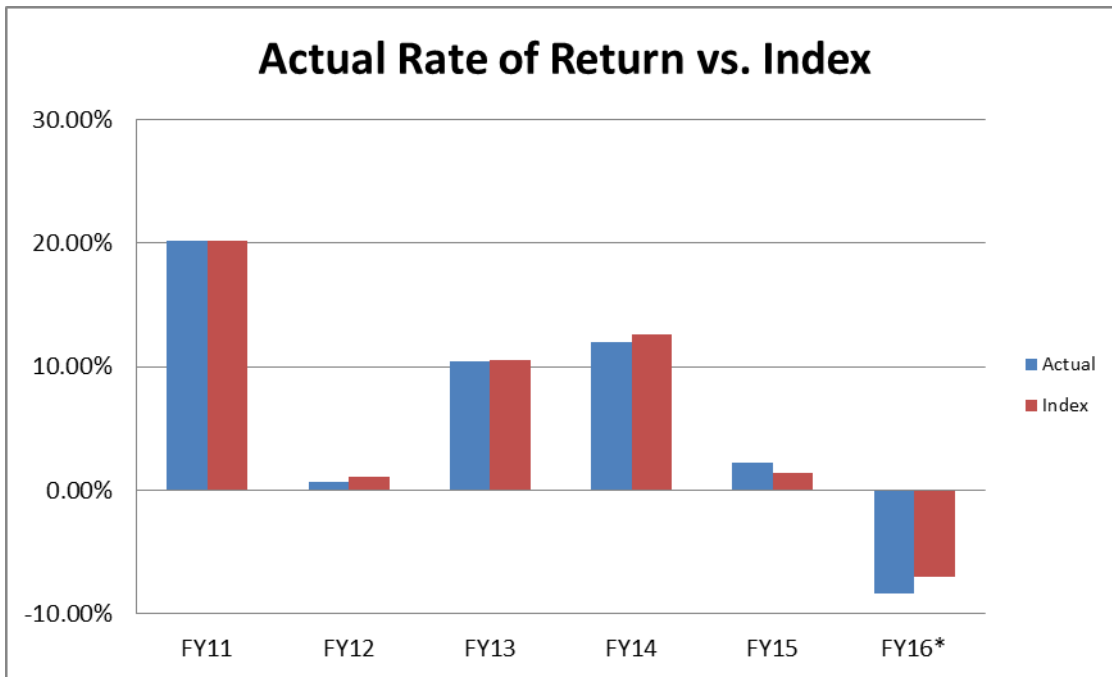
<b>Asset Class</b>	<b>Target Allocation</b>	<b>Actual Allocation</b>	<b>Market Value February 29, 2016</b>
<b>Equity</b>	<b>54%</b>	<b>51%</b>	<b>\$37,052,704</b>
<b>Fixed income</b>	<b>23%</b>	<b>29%</b>	<b>21,038,358</b>
<b>Hedge funds</b>	<b>8%</b>	<b>9%</b>	<b>6,442,170</b>
<b>Private equity</b>	<b>8%</b>	<b>5%</b>	<b>3,465,133</b>
<b>Structured credit</b>	<b>3%</b>	<b>3%</b>	<b>2,465,944</b>
<b>Energy Debt</b>	<b>4%</b>	<b>3%</b>	<b>2,384,946</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>\$72,849,255</b>

Endowment Value



\* Through February 29, 2016

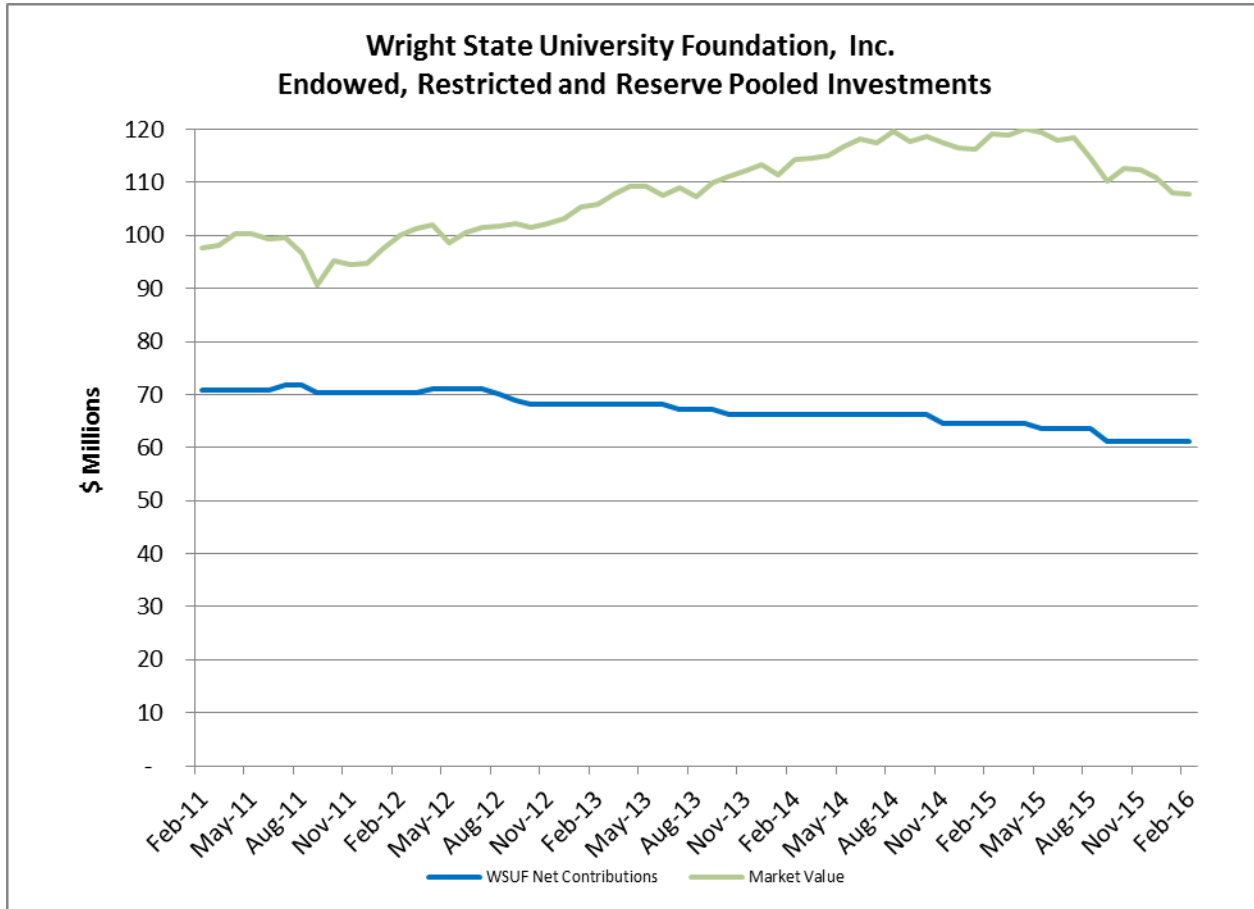
Endowment Historical Rates of Return



\* Through February 29, 2016

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**



**Report of Total Receipts: Cash and Gifts-in-Kind  
For the Month Ended February 29, 2016 and 2015**

**MONTH-TO-DATE**

GIFT SOURCE	FEB 2016		FEB 2015		PCT. CHANGE	
	DONORS	DOLLARS	DONORS	DOLLARS	DONORS	DOLLARS
Alumni	715	\$340,471	468	\$498,556	53%	-32%
Corporations	51	101,264	25	265,645	104%	-62%
Foundations and Organizations	12	84,212	6	41,239	100%	104%
Friends	488	77,061	389	54,448	25%	42%
<b>SUBTOTAL CASH RECEIPTS</b>	<b>1,266</b>	<b>\$603,008</b>	<b>888</b>	<b>\$859,888</b>	<b>43%</b>	<b>-30%</b>
Gifts-in-kind	16	55,572	28	21,729	-43%	156%
<b>TOTAL ALL RECEIPTS</b>	<b>1,282</b>	<b>\$658,580</b>	<b>916</b>	<b>\$881,617</b>	<b>40%</b>	<b>-25%</b>

**FISCAL-YEAR-TO-DATE**

GIFT SOURCE	FY2016		FY2015		PCT. CHANGE	
	DONORS	DOLLARS	DONORS	DOLLARS	DONORS	DOLLARS
Alumni	2,320	\$1,357,766	2,240	\$1,133,176	4%	20%
Corporations	203	1,686,467	219	1,876,784	-7%	-10%
Foundations and Organizations	57	1,747,830	77	605,172	-26%	189%
Friends	1,711	909,826	1,802	1,081,761	-5%	-16%
<b>SUBTOTAL CASH RECEIPTS</b>	<b>4,291</b>	<b>\$5,701,889</b>	<b>4,338</b>	<b>\$4,696,893</b>	<b>-1%</b>	<b>21%</b>
Gifts-in-kind	55	1,612,147	74	306,718	-26%	426%
<b>TOTAL ALL RECEIPTS</b>	<b>4,346</b>	<b>\$7,314,036</b>	<b>4,412</b>	<b>\$5,003,611</b>	<b>-1%</b>	<b>46%</b>

**WRIGHT STATE UNIVERSITY FOUNDATION, INC.**

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

**Fiscal Year-to-Date to February 29, 2016**

(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	\$567,149	\$627,064	\$700,000	\$23,742	\$4,217,000	\$6,134,955	\$5,234,776
Corporations	734,817	466,000	0	1,390,997	0	2,591,814	3,297,619
Foundations and Organizations	475,381	2,805,000	0	150,090	0	3,430,471	689,868
Friends	544,442	62,251	50,000	47,318	10,000	714,011	1,496,992
<b>CURRENT FYTD TOTALS</b>	<b>\$2,321,789</b>	<b>\$3,960,315</b>	<b>\$750,000</b>	<b>\$1,612,147</b>	<b>\$4,227,000</b>	<b>\$12,871,251</b>	
<b>PRIOR FYTD TOTALS</b>	<b>\$2,618,221</b>	<b>\$4,864,933</b>	<b>\$1,227,583</b>	<b>\$306,718</b>	<b>\$1,701,800</b>		<b>\$10,719,255</b>
<b>% CHANGE FROM PRIOR FISCAL YEAR</b>	<b>-11.3%</b>	<b>-18.6%</b>	<b>-38.9%</b>	<b>425.6%</b>	<b>148.4%</b>	<b>20.1%</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	\$366,485	\$71,350	\$0	\$29,632	\$0	\$467,467	\$1,390,269
College of Education & Human Services	45,785	9,340	0	0	0	55,125	45,256
College of Engineering & Computer Science	195,374	5,797	0	1,030	275,000	477,201	3,182,230
College of Liberal Arts	221,638	86,905	0	48,107	12,750	369,400	691,291
College of Nursing & Health	77,987	211,025	0	0	0	289,012	1,615,999
College of Science & Math	44,947	26,272	0	1,349,045	3,250,000	4,670,264	54,855
Curriculum & Instruction	10,557	3,700	0	0	0	14,257	26,970
Enrollment Management	57,856	3,630	0	0	0	61,486	441,108
Intercollegiate Athletics	364,480	328,746	700,000	0	0	1,393,226	639,246
Lake Campus	162,196	870,505	0	0	0	1,032,701	156,379
Other	462,387	126,665	50,000	150,000	500,000	1,289,052	1,802,504
Raj Sooin College of Business	211,916	13,860	0	0	189,250	415,026	491,125
School of Professional Psychology	8,465	760	0	150	0	9,375	12,715
Student Affairs	69,906	1,135	0	1,773	0	72,814	115,896
University College	100	2,200,000	0	0	0	2,200,100	530
University Libraries	21,710	625	0	32,410	0	54,745	52,882
<b>CURRENT FYTD TOTALS</b>	<b>\$2,321,789</b>	<b>\$3,960,315</b>	<b>\$750,000</b>	<b>\$1,612,147</b>	<b>\$4,227,000</b>	<b>\$12,871,251</b>	
<b>PRIOR FYTD TOTALS</b>	<b>\$2,618,221</b>	<b>\$4,864,933</b>	<b>\$1,227,583</b>	<b>\$306,718</b>	<b>\$1,701,800</b>		<b>\$10,719,255</b>
<b>% CHANGE FROM PRIOR FISCAL YEAR</b>	<b>-11.3%</b>	<b>-18.6%</b>	<b>-38.9%</b>	<b>425.6%</b>	<b>148.4%</b>	<b>20.1%</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  
March 2015**

**Planned Giving Update**

FY2016 Results as of March 23:

- There have been 13 new planned gift commitments recorded with a projected/recorded gift value of \$5,032,000. All are bequest expectancies.
- There are 10 additional planned gifts in discussion with an estimated projected value of \$4,868,500
- There are another 30 potential planned gifts 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 Direct Mail Appeal**

The annual fall direct mail appeal began on October 30 and concluded on November 6. Each academic area was customized with a student story 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

90 day results FY16	\$83,530	386 gifts
90 day results FY15	\$63,746	355 gifts

**Spring Phonathon – January 30 – April 6**

Phonathon will conclude on Wednesday, April 6, to date the Spring FY16 Phonathon has surpassed Spring FY15.

- Results as of 3/21/2016: \$156,743, 1922 contributions.
- Spring 2015 results: \$109,604, 1529 contributions

New initiatives included:

- Continued our alumni affinity segments that we started in FY15, increased those affinities and identified new segments – 15 affinities
  - New: Veteran alumni, library alumni and political science
- Conducted a data append in December, which resulted in nearly 30,000 additional prospects
- Multi-Channel approach for our Wed-to-Wed segment. Mailed a non-solicitation postcard February 9 – 11, with Phonathon calls to this segment beginning on February 13 with very specific scripting related to the mail piece.

### **2016 CSIC**

The annual faculty, staff, retiree campaign launched on Thursday, February 25<sup>th</sup>. Results through week 3, \$255,520 and 27% participation. The nine week campaign will conclude on April 29.

Retiree strategy will be developed with the Retirees Association at the end of March.

2015 CSIC results are calculated through December 31. 2015 CSIC Raised \$820,049 and 59% participation.

### **Spring Appeal**

Spring appeal will have three approaches in FY16 as we near the campaign celebration. In the past we have conducted our spring appeal in Mid-May with a direct mail piece to our lapsed donors, those who gave in the previous fiscal year, but not yet the current fiscal year and current donors.

2016 Approach:

- Phase 1: Last call appeal via email to our non-donors and lapsed donors, email April 2
- Phase 2: Last call appeal via postcard mailer to our donor's with a last gift between FY15-FY10. Mailed between April 4 – 6
- Phase 3: Mid-May mailer to our current FY16 donors, this segment is always one of our strongest

### **Student Giving**

February was Student Engagement and Philanthropy Month (SEP) in partnership with CASE.

Two tiers with three student organizations competed to raise dollars for their organization through their own networks. Each tier's winner had an opportunity to win "prize funds" to designate towards their own foundation fund or scholarship. We concluded the competition with a student Tunnel Takeover, on February 25<sup>th</sup>.

**Advancement Committee Report**  
**Rise. Shine. *The Campaign for Wright State University***  
**March 2016**

**Comprehensive Campaign Activity**

- Gifts and pledges of \$129,190,118 have been recorded as of 2/29/2016
  
- Tracking of the four donor classifications includes these totals:

Alumni	\$30,967,927	24.0%
Friends	\$33,708,410	26.1%
Corporations	\$50,468,492	39.1%
Foundations	\$14,045,288	10.9%
  
- Gifts have been committed in these three areas:

Individuals	\$42,095,060	(students and their success)
Environments	\$42,667,763	(capital projects)
Innovations	\$44,427,294	(programmatic investments)
  
- Types of gifts:

Gifts of cash	\$33,583,911
5-year pledges	\$36,895,865
Planned gifts	\$35,370,552
Gifts in kind	\$23,339,789

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

**Campaign Conclusion:** December 2016

**Campaign Impact to Date:**

- 29,536 individual donors have made gifts to Rise. Shine. (also includes foundations & corporations)
- First-time gifts to Wright State were received from 16,198 donors

**Campaign Emphasis:**

- Continuing to work on bringing gift commitments to a successful conclusion
- Refining strategic initiatives for continuation following formal close of *Rise. Shine.*
- Preparing for the celebration of reaching the campaign goal with Mr. Tom Hanks and Mrs. Amanda Wright Lane in April
- Campaign commitments in FY '16 are running 20% ahead of same time period in FY '15!
- Preparing to share the transformative impact of *Rise. Shine.* by sharing donor and impact stories in the second half of calendar year 2016