

**WRIGHT STATE UNIVERSITY  
BOARD OF TRUSTEES**

**Advancement Committee Report  
December 2015**

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

**Advancement Committee Report  
Alumni Relations Report  
December 2015**

**Event Updates:**

The final Rise. Shine. mini launches were completed last quarter.  
October 17 in Washington DC – 91 attendees  
November 13 in Cincinnati – 156 attendees

We had 280 alumni attend the regional events (this does not include friends, guests, staff, etc.)

- Over 50% of these 280 were first time attendees for any Wright State event
- 75 had donated in calendar year 2015
- 38 gave a donation within 56 days of the event
- 7 were first time donors to Wright State
- The average gift of all alumni donors who attended in 2015 is \$2,516.24

**Communication Updates:**

In early 2016, the Association will be launching a rebranded look for all communication including the website, postcard, and eNewsletter.

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

- Feb. 20 – Annual Beer tasting
- Feb. 20 – GOLD Basketball and Beer
- Feb. 27 – Rowdy Gras
- March 5-8 - Men's Basketball Horizon League Tournament
- March 10 – CONH Alumni Society CEU
- March 22 – CONH Alumni Society Raise Your Brush event
- Aug. 6-7 – Alumni College
- Aug. 7 – Kings Island Day
- Aug. 29 – Legacy Scholarship Golf Outing, Walnut Grove Country Club

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

The financial markets rebounded in October, but slipped back slightly in November leaving the Foundation's endowment portfolio's total return in the red so far in FY16. The net return for October was 2.4%, while November resulted in a loss of 0.3%. This translates to an overall loss of 3.6% for the fiscal year that began July 1. Private equity returns, which are not included in the above figures, added 33 basis points to the FYTD return. Longer-term return rates were: 1-year -2.1%, 3-year 5.4%, 5-year 6.0% and 10-year 4.7%, with all of these returns underperforming their composite benchmarks. For the fiscal year, fixed income has outperformed equities, although both have produced losses so far. Large cap stocks have outperformed small cap issues. Alternative assets, with the exception of private equity as mentioned above, have also experienced losses during the year with our hedge fund losing 4.8% and our structured credit investment eroding 6.6%. Our new investment in energy debt also has lost value due to depressed oil and gas prices. The endowment portfolio ended November with a market value of \$76.4 million, down approximately \$3.6 million since the beginning of the year (including capital withdrawals).

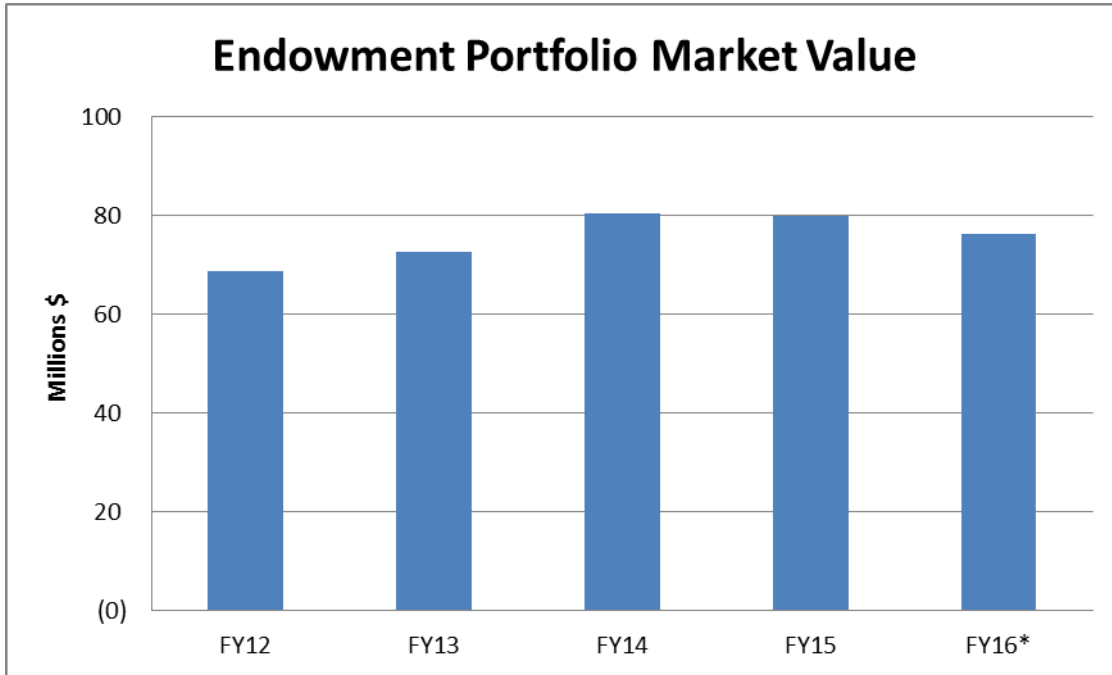
Portfolio allocations finally settled out in November and now more closely reflect the allocation formula approved by the Investment Committee late last fiscal year. The delay in achieving this balance can be explained by the fact that most of these reallocations involved alternative assets that are subject to lock-up periods and exit pre-notification requirements. With respect to the private equity allocation, we are subject to periodic capital calls building toward the full allocation. However, it is likely that full allocation will not be reached since the funds are making capital distributions which will decrease the actual investment organically.

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

**Endowment Portfolio Composition**

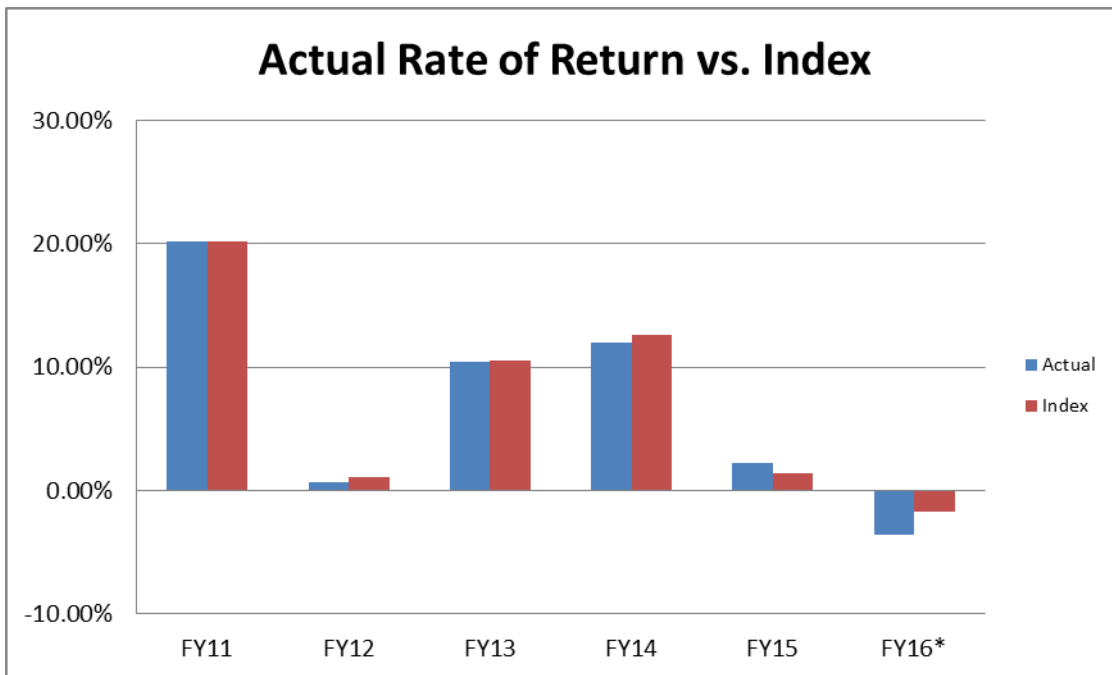
<b>Asset Class</b>	<b>Target Allocation</b>	<b>Actual Allocation</b>	<b>Market Value November 30, 2015</b>
<b>Equity</b>	<b>54%</b>	<b>52%</b>	<b>\$40,033,761</b>
<b>Fixed income</b>	<b>23%</b>	<b>28%</b>	<b>21,382,634</b>
<b>Hedge funds</b>	<b>8%</b>	<b>8%</b>	<b>6,477,049</b>
<b>Private equity</b>	<b>8%</b>	<b>4%</b>	<b>2,833,175</b>
<b>Structured credit</b>	<b>3%</b>	<b>4%</b>	<b>2,727,817</b>
<b>Energy Debt</b>	<b>4%</b>	<b>4%</b>	<b>2,902,195</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>\$76,356,631</b>

**Endowment Value**



\* Through November 30, 2015

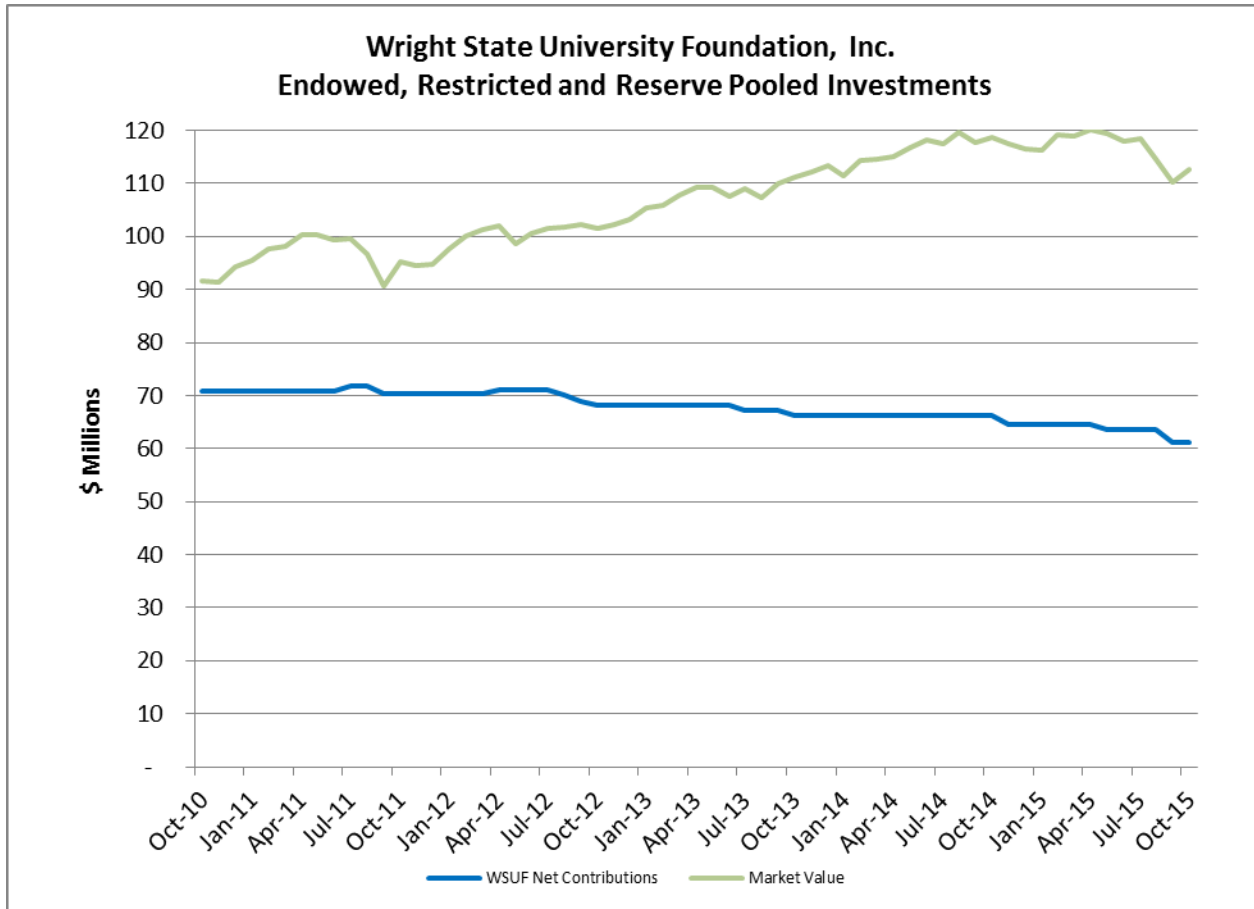
**Endowment Historical Rates of Return**



\* Through November 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 December 31, 2015 and 2014

**MONTH-TO-DATE**

GIFT SOURCE	DEC 2015		DEC 2014		PCT. CHANGE	
	DONORS	DOLLARS	DONORS	DOLLARS	DONORS	DOLLARS
Alumni	724	\$292,027	790	\$284,798	-8%	3%
Corporations	49	253,144	92	206,403	-47%	23%
Foundations and Organizations	23	147,365	26	237,931	-12%	-38%
Friends	643	338,737	599	563,397	7%	-40%
<b>SUBTOTAL CASH RECEIPTS</b>	<b>1,439</b>	<b>\$1,031,273</b>	<b>1,507</b>	<b>\$1,292,529</b>	<b>-5%</b>	<b>-20%</b>
Gifts-in-kind	6	6,505	9	72,812	-33%	-91%
<b>TOTAL ALL RECEIPTS</b>	<b>1,445</b>	<b>\$1,037,778</b>	<b>1,516</b>	<b>\$1,365,341</b>	<b>-5%</b>	<b>-24%</b>

**FISCAL-YEAR-TO-DATE**

GIFT SOURCE	FY2016		FY2015		PCT. CHANGE	
	DONORS	DOLLARS	DONORS	DOLLARS	DONORS	DOLLARS
Alumni	1,921	\$988,084	2,019	\$603,390	-5%	64%
Corporations	150	1,495,467	188	1,549,740	-20%	-4%
Foundations and Organizations	48	1,534,037	70	510,904	-31%	200%
Friends	1,464	764,645	1,586	945,360	-8%	-19%
<b>SUBTOTAL CASH RECEIPTS</b>	<b>3,583</b>	<b>\$4,782,233</b>	<b>3,863</b>	<b>\$3,609,394</b>	<b>-7%</b>	<b>32%</b>
Gifts-in-kind	22	1,527,809	35	282,862	-37%	440%
<b>TOTAL ALL RECEIPTS</b>	<b>3,605</b>	<b>\$6,310,042</b>	<b>3,898</b>	<b>\$3,892,256</b>	<b>-8%</b>	<b>62%</b>

**WRIGHT STATE UNIVERSITY FOUNDATION, INC.**

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

**Fiscal Year-to-Date to December 31, 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	\$489,532	\$248,222	\$0	\$21,807	\$2,967,000	\$3,726,561	\$5,046,581
Corporations	626,843	465,000	0	1,350,439	0	2,442,282	3,040,565
Foundations and Organizations	327,588	2,605,000	0	150,090	0	3,082,678	591,771
Friends	429,091	46,331	50,000	5,473	10,000	540,895	1,004,133
<b>CURRENT FYTD TOTALS</b>	<b>\$1,873,054</b>	<b>\$3,364,553</b>	<b>\$50,000</b>	<b>\$1,527,809</b>	<b>\$2,977,000</b>	<b>\$9,792,416</b>	
<b>PRIOR FYTD TOTALS</b>	<b>\$2,292,887</b>	<b>\$4,554,718</b>	<b>\$1,227,583</b>	<b>\$282,862</b>	<b>\$1,325,000</b>		<b>\$9,683,050</b>
<b>% CHANGE FROM PRIOR FISCAL YEAR</b>	<b>-18.3%</b>	<b>-26.1%</b>	<b>-95.9%</b>	<b>440.1%</b>	<b>124.7%</b>	<b>1.1%</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	\$301,175	\$58,970	\$0	\$19,632	\$0	\$379,777	\$1,330,888
College of Education & Human Services	19,555	5,585	0	0	0	25,140	29,800
College of Engineering & Computer Science	180,419	3,725	0	0	275,000	459,144	3,107,188
College of Liberal Arts	166,030	83,705	0	3,099	12,750	265,584	486,436
College of Nursing & Health	72,962	210,025	0	0	0	282,987	1,576,298
College of Science & Math	38,920	22,792	0	1,349,045	2,000,000	3,410,757	34,860
Curriculum & Instruction	9,902	330	0	0	0	10,232	25,692
Enrollment Management	51,391	2,580	0	0	0	53,971	57,836
Intercollegiate Athletics	259,867	25,576	0	0	0	285,443	590,170
Lake Campus	55,915	870,355	0	0	0	926,270	140,420
Other	443,801	68,580	50,000	150,000	500,000	1,212,381	1,750,911
Raj Soin College of Business	185,291	10,475	0	0	189,250	385,016	401,000
School of Professional Psychology	8,465	670	0	150	0	9,285	12,615
Student Affairs	62,566	560	0	1,473	0	64,599	91,175
University College	100	2,000,000	0	0	0	2,000,100	530
University Libraries	16,695	625	0	4,410	0	21,730	47,231
<b>CURRENT FYTD TOTALS</b>	<b>\$1,873,054</b>	<b>\$3,364,553</b>	<b>\$50,000</b>	<b>\$1,527,809</b>	<b>\$2,977,000</b>	<b>\$9,792,416</b>	
<b>PRIOR FYTD TOTALS</b>	<b>\$2,292,887</b>	<b>\$4,554,718</b>	<b>\$1,227,583</b>	<b>\$282,862</b>	<b>\$1,325,000</b>		<b>\$9,683,050</b>
<b>% CHANGE FROM PRIOR FISCAL YEAR</b>	<b>-18.3%</b>	<b>-26.1%</b>	<b>-95.9%</b>	<b>440.1%</b>	<b>124.7%</b>	<b>1.1%</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  
December 2015**

**Planned Giving Update**

FY2016 Results as of December 15:

- Eight new planned gift commitments with a projected/recorded gift value of \$2,687,265. All are bequest expectancies.
- 11 additional planned gifts are in discussion with an estimated projected value of \$5,223,500
- 33 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 Phonathon – September 12 – November 12**

Phonathon raised nearly \$265,000 in FY15 with an improved fulfillment rate of 75%, which is up about 10% over FY14. Results for Fall FY16, \$120,296 compared to \$140,043 in Fall FY15.

Strategies in 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 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

30 day results FY16	\$32,692	217 gifts
30 day results FY15	\$20,650	164 gifts

### **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. As of November 2014 CSIC \$647,604 with 59% participation compared to November 2015 CSIC \$634,800 with 57% 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 took place on Tuesday, December 1 with a similar approach to that of 2014 which included an alumni giving social media campaign and an on campus event targeted towards the education of philanthropy with our students. In 2015, we raised nearly \$2800 more than last year.

Tunnel Takeover planning is in full swing, students will fundraise during the month of February with a walk taking place on Thursday, February 25<sup>th</sup> prior to the CSIC Kickoff.

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

**Comprehensive Campaign Activity**

- Gifts and pledges of \$125,137,920 have been recorded as of 11/30/2015.
- Current presidential ask proposals total \$78+ million
- College/school proposals outstanding represent \$43 million in asks
- Tracking of the four donor classifications includes these totals:

Alumni	\$28,000,983	22.4%
Friends	\$33,334,089	26.6%
Corporations	\$50,119,130	40.1%
Foundations	\$13,683,718	10.9%
- Gifts have been committed in these three areas:

Individuals	\$40,987,818	(students and their success)
Environments	\$41,520,567	(capital projects)
Innovations	\$42,629,534	(programmatic investments)

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

**Campaign Conclusion:** December, 2016

**Campaign Impact to Date:**

- 28,492 individual donors have made gifts to Rise. Shine. (also includes foundations & corporations)
- The College of Liberal Arts has raised \$18,419,328!!
- First-time gifts to Wright State were received from 15,364 donors

**Campaign Emphasis:**

- Campaign mini-launches have been completed.
- 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 was raised from regional locations!

**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