

**WRIGHT STATE UNIVERSITY
BOARD OF TRUSTEES**

**Advancement Committee Report
October 2016**

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

Advancement Committee Report

Alumni Relations Report

October 2016

Updates:

Alumni Survey

In June 2016, the Wright State Alumni Association sent an alumni survey via e-mail to more than 43,600 alumni across the country and abroad. The survey was active for 60 days, closing on August 1, 2016. The survey was personalized to three specific constituent groups: alumni residing in Raider Country (the 16-county region in Ohio anchored by Wright State's two campuses); alumni residing outside Raider Country (including all other counties in Ohio, all 50 states and more than 75 countries outside the U.S.); and all Lake Campus alumni, regardless of residence. The overall response rate was just over 3%, totaling more than 1,300 responses from alumni. The last survey conducted by the Wright State Alumni Association was in 2010 through an external vendor.

Homecoming 2016

- Homecoming 2016 continued to build in tradition and attendance at Wright State. Over 1,000 people attended alumni events held during the weekend. This year, the annual Alumni Leader Conference was held Friday morning and afternoon. Twenty-six network and society leaders joined us from around the country.
- Highlights of the weekend include the annual Alumni Achievement Awards, for which Tom Hanks was recognized as an Honorary Alumnus, many reunions/affinity events, and the ever growing annual Homecoming Festival hosted for the entire Wright State community.

Legacy Scholarship Golf Outing, August 29

- 100 attendees, over \$18,000 raised for the Legacy Scholarship Golf Outing

Life After Wright State '17 Senior Series

The "Life After Wright State" (LAWS) series is a series of professional development, educational, networking, and social events that are designed to help our soon-to-be graduates transition from student to alumnus. Although not all the dates have been set for the LAWS '17 series, here's a sneak peak of what programs will be offered this spring:

- Welcome Back Happy Hour at the Wandering Griffin (January)
- Professional Development Fair (Early February)
- WSU Themed Canvas Painting event (Week of February 20th)
- NYT Bestselling author, Kelly Williams Brown (March 8th)
- Student/Alumni Speed Networking (Week of April 27th)
- Annual Senior Sendoff Picnic (Thursday, April 13th)
- Finals Week Happy Hour @ Fox & Hound (Tuesday, April 25th)
- 3rd Annual President's Champagne Toast (Thursday, April 27th)

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

- Nov. 5 – Alumni Beer Crawl brought to you by GOLD and FSAS
- Nov. 8 – RENT! Featuring alumna Jasmine Easler '16 (8 tickets left)
- Nov. 13 – California Alumni Brunch
- Dec. 7 – FSAS Wine and Chocolate Scholarship fundraiser

Upcoming Events 2017

- Jan. 7 – Wright State Annual Beer Tasting, post-Men's BB game
- Feb. 3 – COAA dinner
- Feb. 24 – CEHS Night at the Raider Men's BB game
- Feb. 24 – Alumni Day at the Game
- Feb. 25 – Rowdy Gras
- May/June – Alumni Domestic Trip (Vineyards, IN, KY)
- July 23 – Wright State Kings Island Day
- Aug/Sept. – Alumni Domestic Trip (Bourbon Trail Tour)
- Sept. 29 – Oct. 1 – Homecoming 2017 Wright State 50th Anniversary
- Oct. – Domestic Trip (DC, History tour)

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

Returns for the first quarter of fiscal year 2017 reversed course from the previous fiscal year with each of the three months in the quarter reporting positive results. For the quarter, the endowment portfolio returned 3.46% on an absolute basis, outperforming its composite benchmark by 34 basis points. On a longer-term horizon, the portfolio's 1-, 3-, 5- and 10-year returns were 6.73%, 3.85%, 7.02% and 4.29%, respectively. All asset classes reported positive returns during the quarter, led by equities (+4.83%) and alternative strategies (+4.36%). The highest performing alternative asset was our Energy Debt fund, which returned 10.16% for the quarter. In the equities space, emerging markets also returned over 10% for the quarter with small cap outperforming large cap in the domestic markets (+6.14 vs. +5.31). High yield fixed income investments provided the best returns in the bond allocation with a 6.08% uptick for the quarter. Our endowment portfolio ended September with a value of \$76.7 million, up \$0.6 million since the last report (includes a \$2 million capital withdrawal). Asset allocations remained stable during the period and within tolerances established by the Foundation's investment policy statement.

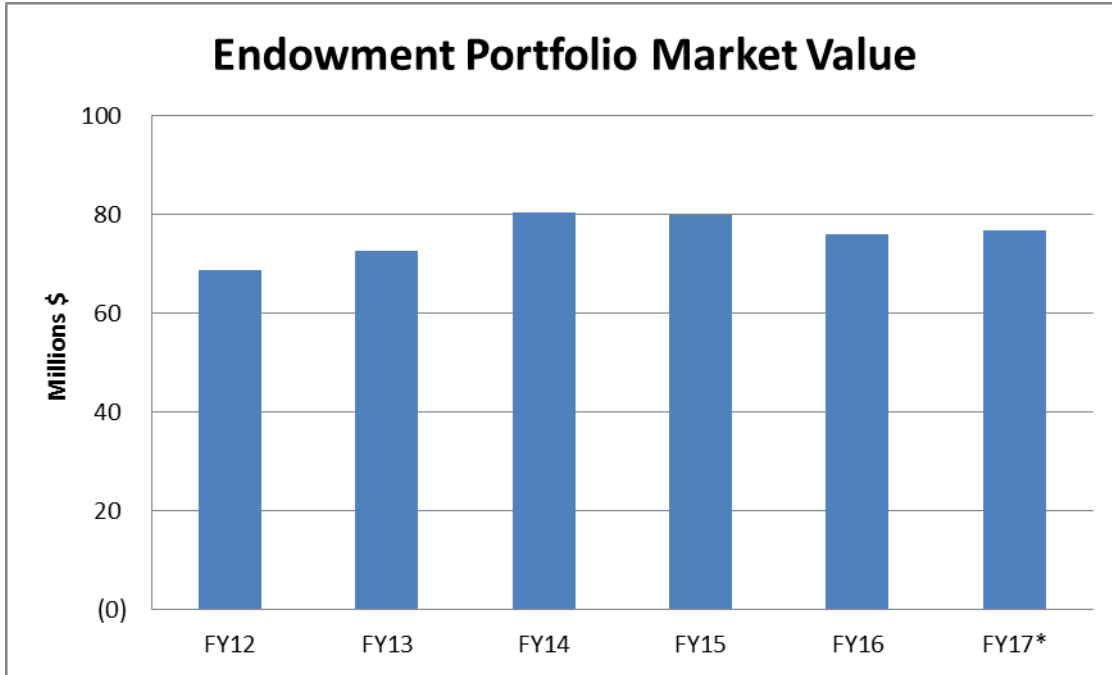
Investment gains described above contributed to a slight increase in the Foundation's reserve position. The Foundation's unrestricted net assets balance (which we use as proxy for our reserve) ended the quarter at \$5.9 million, up \$0.7 million (or 13%) over the end of the previous fiscal year. The reserve continues to be lower than we would like due to the Foundation's recent support of the University's fund-raising campaign, branding initiative and special events such as the Tom Hanks visit.

The Foundation's current endowment target allocation, actual allocation, and market values as of September 30, 2016, are presented below:

Endowment Portfolio Composition

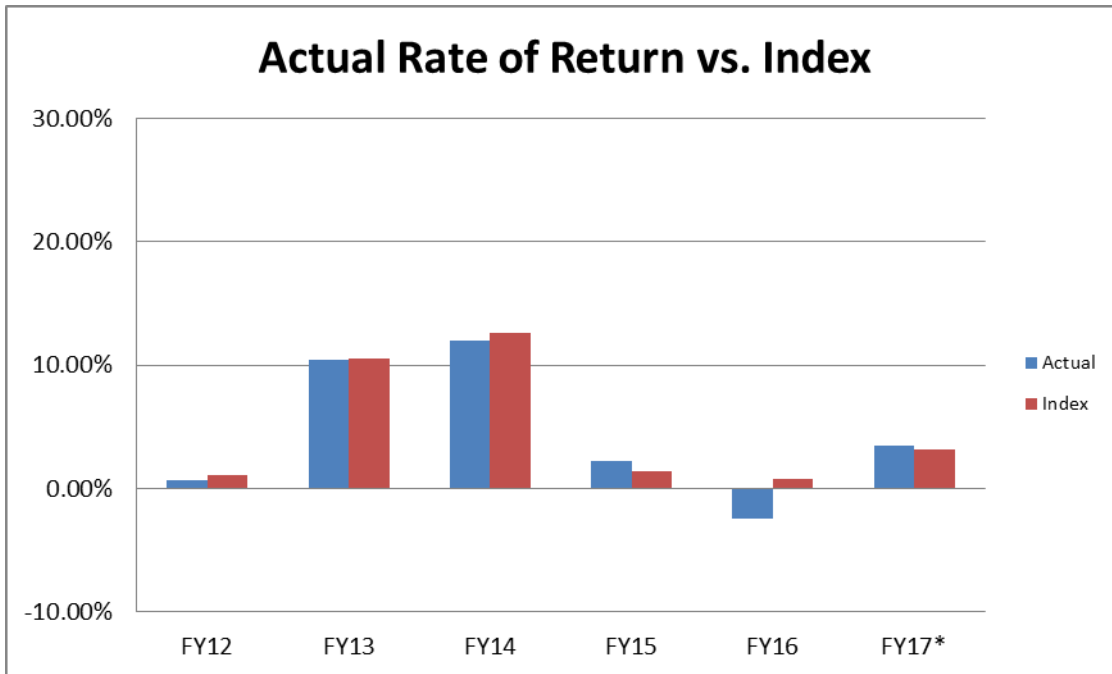
Asset Class	Target Allocation	Actual Allocation	Market Value September 30, 2016
Equity	52%	54%	\$41,241,501
Fixed income	28%	28%	21,604,496
Hedge funds	8%	8%	5,813,913
Private equity	8%	6%	4,551,757
Energy Debt	4%	4%	3,231,569
Cash & equivalents	0%	0%	251,828
Totals	100%	100%	\$76,695,064

Endowment Value



* Through September 30, 2016

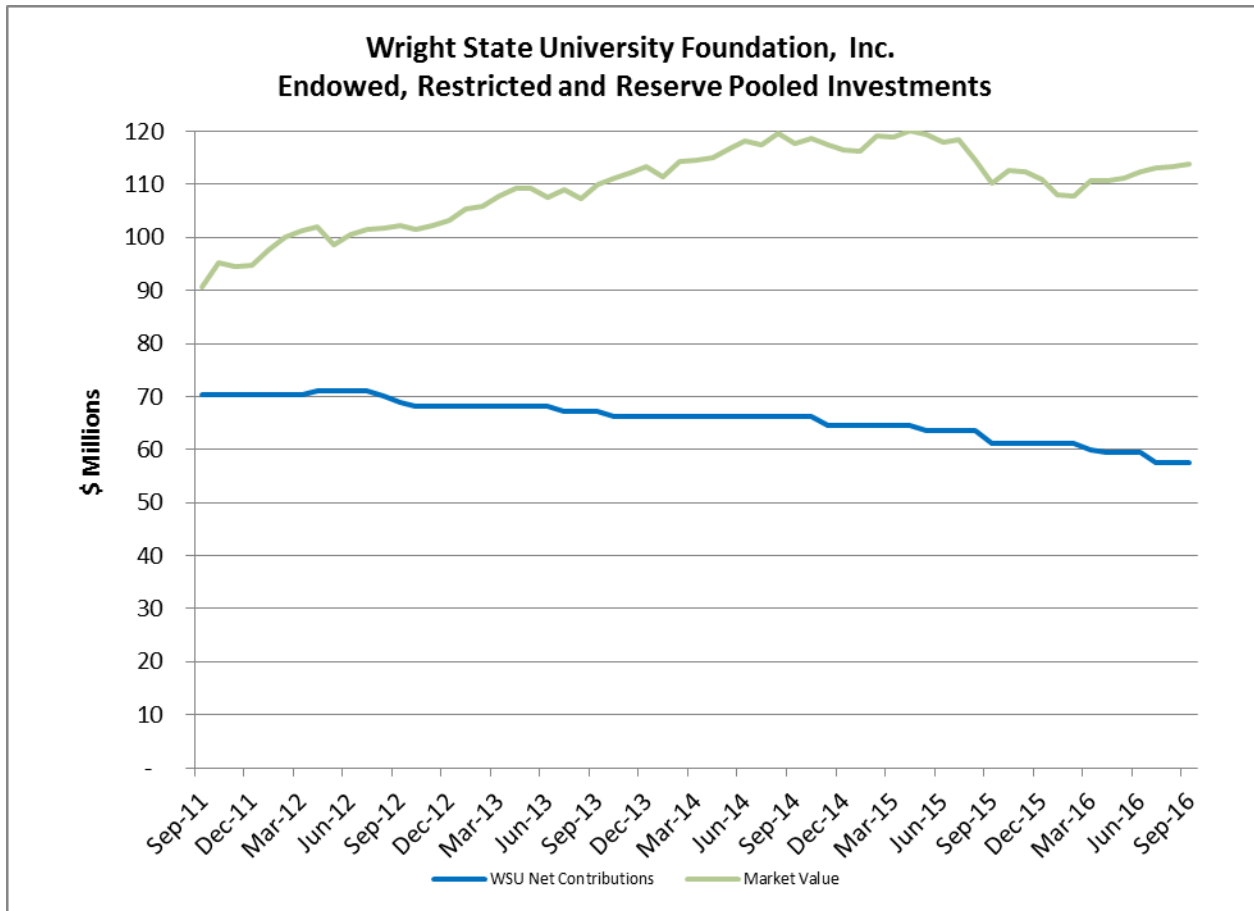
Endowment Historical Rates of Return



* Through September 30, 2016

The index is composed of various market indices of like asset classes in the same proportion as the Foundation’s approved asset allocation as defined in its Investment Policy Statement (IPS).

All Portfolios Value vs. Contributions



WRIGHT STATE UNIVERSITY FOUNDATION, INC.

Report of Total Receipts: Cash and Gifts-in-Kind

For the Month Ended October 31, 2016 and 2015

MONTH-TO-DATE

GIFT SOURCE	OCT 2016		OCT 2015		PCT. CHANGE	
	DONORS	DOLLARS	DONORS	DOLLARS	DONORS	DOLLARS
Alumni	320	\$77,970	706	\$89,720	-55%	-13%
Corporations	31	408,278	26	107,822	19%	279%
Foundations and Organizations	9	54,046	9	647,874	0%	-92%
Friends	343	50,126	489	116,719	-30%	-57%
SUBTOTAL CASH RECEIPTS	703	\$590,420	1,230	\$962,135	-43%	-39%
Gifts-in-kind	2	479	3	19,782	-33%	-98%
TOTAL ALL RECEIPTS	705	\$590,899	1,233	\$981,917	-43%	-40%

FISCAL-YEAR-TO-DATE

GIFT SOURCE	FY2017		FY2016		PCT. CHANGE	
	DONORS	DOLLARS	DONORS	DOLLARS	DONORS	DOLLARS
Alumni	706	\$376,401	1,171	\$603,474	-40%	-38%
Corporations	88	625,416	91	1,070,981	-3%	-42%
Foundations and Organizations	28	374,872	21	735,518	33%	-49%
Friends	711	244,830	908	373,636	-22%	-34%
SUBTOTAL CASH RECEIPTS	1,533	\$1,621,519	2,191	\$2,783,609	-30%	-42%
Gifts-in-kind	10	137,046	10	1,370,619	0%	-90%
TOTAL ALL RECEIPTS	1,543	\$1,758,565	2,201	\$4,154,228	-30%	-58%

WRIGHT STATE UNIVERSITY FOUNDATION, INC.

Report of Fundraising Totals By Source and Unit

Fiscal Year-to-Date to October 31, 2016

(including totals from prior fiscal year)

BY SOURCE

SOURCE	CASH ¹	PLEDGES ²	IRREVOCABLE	GIFTS OF	REVOCABLE	CURRENT FYTD	PRIOR FYTD
			DEFERRED	PROPERTY*	DEFERRED		
			GIFTS ³		GIFTS ³	TOTALS	TOTALS
Alumni	\$265,486	\$34,000	\$0	\$3,150	\$950,000	\$1,252,636	\$3,074,187
Corporations	237,999	18,000	0	131,817	0	387,816	2,062,676
Foundations and Organizations	345,672		0	0	0	345,672	765,159
Friends	178,036	11,075	0	2,079	0	191,190	319,540
CURRENT FYTD TOTALS	\$1,027,193	\$63,075	\$0	\$137,046	\$950,000	\$2,177,314	
PRIOR FYTD TOTALS	\$956,590	\$1,207,353	\$0	\$1,370,619	\$2,687,000		\$6,221,562
% CHANGE FROM PRIOR FISCAL YEAR	7.4%	-94.8%	N/A	-90.0%	-64.6%	-65.0%	

BY UNIT

UNIT	CASH ¹	PLEDGES ²	IRREVOCABLE	GIFTS OF	REVOCABLE	CURRENT FYTD	PRIOR FYTD
			DEFERRED	PROPERTY*	DEFERRED		
			GIFTS ³		GIFTS ³	TOTALS	TOTALS
Boonshoft School of Medicine	\$84,924	\$1,000	\$0	\$0	\$0	\$85,924	\$232,152
College of Education & Human Services	6,089	0	0	0	0	6,089	16,340
College of Engineering & Computer Science	113,959	10,000	0	0	0	123,959	106,964
College of Liberal Arts	63,868	12,550	0	13,680	0	90,098	142,073
College of Nursing & Health	1,820	10,000	0	4,466	0	16,286	218,260
College of Science & Math	83,221	0	0	0	250,000	333,221	3,389,917
Curriculum & Instruction	11,575	0	0	0	0	11,575	4,248
Enrollment Management	9,670	0	0	0	0	9,670	15,577
Intercollegiate Athletics	143,991	0	0	0	0	143,991	161,342
Lake Campus	0	18,000	0	2,000	0	20,000	810,355
Other	370,101	11,500	0	116,500	0	498,101	809,686
Raj Sooin College of Business	75,007	0	0	0	450,000	525,007	260,935
School of Professional Psychology	9,730	0	0	0	100,000	109,730	4,670
Student Affairs	34,213	0	0	400	150,000	184,613	44,398
University College	0	0	0	0	0	0	100
University Libraries	19,025	25	0	0	0	19,050	4,545
CURRENT FYTD TOTALS	\$1,027,193	\$63,075	\$0	\$137,046	\$950,000	\$2,177,314	
PRIOR FYTD TOTALS	\$956,590	\$1,207,353	\$0	\$1,370,619	\$2,687,000		\$6,221,562
% CHANGE FROM PRIOR FISCAL YEAR	7.4%	-94.8%	N/A	-90.0%	-64.6%	-65.0%	

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
October 2016**

Planned Giving Update

Results for Quarter 1 of FY2017 (as of 9/30/16):

Six new planned gift commitments have been secured with a projected gift value of \$1,550,000. All are documented bequest intentions.

An additional seven planned gifts are in discussion with an estimated projected value of \$1,185,000. There are 34 additional potential planned gifts that are in early stage discussion.

In early September, a direct mail piece was sent to constituent's age 70½ and older promoting the facility and benefits of making an IRA Rollover gift to the University. This was followed up by an email sent to the same constituents with a like promotion in October.

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 will begin on November 1 and include 12 unique segments. It will be customized with students in each academic or interest area. The appeal will be expanded this fall to include friends. Historically, friends were not solicited as part of our fall direct mail, however, with the suspension of Phonathon due to the reductions in the Advancement budget, it is important that we take new measures to reach our friend donors in the fall.

Initiatives include:

- Encourage donors to move up to the next giving society
- Strategic donor amounts suggested based on their previous giving history
- College priority funds and the WSU Excellence Fund are highlighted as funds for designation of gifts
- Decrease the non-donor segment in an effort to increase ROI

Fall Appeal – Multi-Channel Strategy

Introducing a new Student Development Officer, multi-channel, integrated marketing approach. Seven segments have an SDO that will be featured in the direct mail piece. In addition, there is a video email campaign integrated into the direct mailer. A teaser email will be sent 3-5 days prior to the arrival of the mailer, followed by a second video email featuring a 90 second video of the student highlighting them and their story and, last, a third video email serving as a thank you.

CSIC Retiree Phonathon Campaign

Over the last two years, we have called our Retirees who have not contributed yet in the calendar year. With the absence of Phonathon this year, we will continue to conduct this calling campaign utilizing our SDOs, who were previous Phonathon callers. These calls will take place in the month of November.

#GivingTuesday

We will once again participate in #GivingTuesday to increase student philanthropy and education of philanthropy for Wright State. #GivingTuesday will take place on Tuesday, November 29, with a similar approach to 2015. An Alumni giving campaign and an on campus special event targeted towards the philanthropic education of our students will be the focus of lunch on the 29th.

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

Comprehensive Campaign Activity

- Gifts and pledges of \$161,299,251 have been recorded as of 9/30/2016
- Tracking of the four donor classifications includes these totals:

Alumni	\$32,572,764	20.2%
Friends	\$38,449,938	23.8%
Corporations	\$75,496,054	46.8%
Foundations	\$14,780,494	9.2%

- Gifts have been committed in these three areas:

Individuals	\$47,343,651	(students and their success)
Environments	\$67,428,516	(capital projects)
Innovations	\$46,527,083	(programmatic investments)

- Types of gifts:

Gifts of cash	\$35,892,326
5-year pledges	\$38,451,759
Planned gifts	\$37,713,391
Gifts in kind	\$49,241,776

Campaign Conclusion: December 2016

Campaign Impact to Date:

- Nine states outside of Ohio recorded gifts of \$1 million plus to *Rise. Shine.*
- 264 alumni made gifts of \$10,000 and above.
- Total of new alumni donors to *Rise. Shine.* – 5,032.

Campaign Emphasis:

- Refining strategic initiatives for continuation following formal close of *Rise. Shine.*
- Conducting a final approach to include prospective donors who haven't made a gift
- Preparing to share the transformative impact of *Rise. Shine.* by sharing donor and student stories in the first half of calendar year 2017.