

**WRIGHT STATE UNIVERSITY
BOARD OF TRUSTEES**

**Advancement Committee Report
March 2017**

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

**Advancement Committee Report
Alumni Relations Report
March 2017**

Updates:

Dayton Alumni Council

- In an effort to engage more alumni in the Greater Dayton area, leaders from the Greater Dayton Alumni Network, in conjunction with local alumni society leadership, continue to meet on a quarterly basis. This group is currently planning a Wright State Alumni Service Day. The event will be held in late October or early November. Alumni leaders will work with local nonprofits to set up service sites and alumni will be invited to register for a day of service and choose their preferred service site.

The 50th Anniversary of Wright State

- Many of the events that the Alumni Relations team and Alumni Association are planning this year will promote the 50th anniversary of the university. Homecoming weekend 2017 will be held on Friday, September 29 – Sunday, October 1. The following events will be held during the weekend:
 - Reunion of the founding classes (1967-1971)
 - Black Alumni Reunion
 - Greek Alumni Reunion
 - Guardian and Radio Station Alumni Reunion
 - Student Government Alumni Reunion
 - Residence Life and Housing Alumni and Staff Reunion
 - Campus Rec and Student Union Administrative Student Staff Alumni Reunion
 - Alumni College with many events open to the public sessions
 - COSM Pub Science
 - CEHS Trivia Night
 - Alumni Achievement Awards
 - Homecoming Festival
 - Legacy Scholarship Brunch
 - Campus Tours

Life After Wright State '17 Senior Series

- This year's Life After Wright State kicked off with our second annual Wine & Canvas Night, where both alumni and students came together to paint an iconic scene of Wright State. We had 35 students and alumni in attendance.

We also welcomed *New York Times* bestselling author, Kelly Williams Brown, to campus in March to talk to students and the community about "Adulthood." Kelly spent the morning with students from the Mass Communications Department & *The Guardian* Newspaper who were interested in learning about how Kelly went from an editor of her college newspaper to a *New*

York Times bestselling author. Kelly was also featured on *Living Dayton* in the afternoon to promote the evening talk on campus. Prior to her public talk, Kelly spent some time with nearly 40 young professionals from across the Dayton region. The Alumni Association partnered with Generation Dayton, UpDayton, Graduates of the Last Decade, and Junior Force Council for this event. Kelly's visit was topped off with a public talk on campus where 80 people attended.

Upcoming events for this year's Life After Wright State Series is a Speed Networking event with Wright State alumni & students. We currently have 10 alumni mentors confirmed and nearly 20 students. Later this spring, we will host our annual Senior Picnic, late-night happy hour, and Mud Volleyball Tournament.

Washington D.C. Tour

- The Alumni Association is excited to announce a new tour program has been added to its list of programs for alumni. Raiders on Tour is a new program designed to provide alumni with unique travel experiences on a smaller budget and timeframe. Existing trip/tours that are now a part of the Raiders on Tour include our most popular tours, The Bourbon Tour & the Cincinnati Reds trip. New to the tour program is our Indiana Wine Trail Tour & the Washington D.C. tour.

In late August of this year, the Alumni Association is inviting faculty, staff, students, alumni, and history buffs alike to join us for our first annual Washington D.C. tour. This four-day, three-night tour will include stops at Thomas Jefferson's Monticello, George Washington's Mount Vernon, the Smithsonian's brand new African American History & Culture Museum, and much more! We are also excited that Dr. Noeleen McIlvenna, commonly known as Dr. No to students and colleagues, will be joining us on the tour as the "Faculty-on-Tour". Dr. No is a Professor in the Wright State History Department and specializes in Colonial American History.

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

March 24 – 9 to 5 performance and reception
March 28 – LAWS: Student and Alumni Speed Networking
April 1 – Cincinnati Red Futures Game
April 13 – LAWS: Senior Send-Off Picnic
April 14 – Amigos Latinos Alumni Society silent auction at Amigos Latinos Gala
April 15 – LGBTQ & Ally Alumni Society reception at the Lavender Graduation
April 19 – CONH Alumni Wine Tasting
April 25 – LAWS: Finals Week Happy Hour @ Fox and Hound
April 30 – MPAAS Alumni and Student reception
June 10-11 – Alumni Domestic Trip (Vineyards, IN, KY)
July 17 – NLAAS Guest Bartender Event @ Fifth Street Brew Pub
July 23 – Wright State Kings Island Day
August 5 – Cincinnati Reds Trip
August 24 – 27 – Washington D.C. Alumni Tour, History of Colonial America
Sept. – Alumni Domestic Trip (Bourbon Trail Tour)
Sept. 29 – Oct. 1 – Homecoming 2017, Wright State 50th Anniversary

**Advancement Committee Report
Wright State University Foundation Report
March 2017**

Positive market performance since the last report has continued to bolster the Foundation’s fiscal condition. Our endowment portfolio has returned a solid 8.82% for the first eight months of FY17. That return is 106 basis points (bps) better than its associated composite benchmark. Longer-term returns are also trending higher, although they continue to lag their benchmarks. Thus far this year, the biggest gainers have been equities (+11.9%), multi-asset strategies (+11.0%) and alternative assets (+12.8%). Fixed income investments have also contributed a positive 2.6% return for the year. Within the equity space, small cap issues have outperformed large cap and international stocks have been led by emerging market returns. Although fixed income investments have performed modestly for the year, a notable exception has been high yield investments, which have returned over 12%. Although it started off slow, our investment in energy sector distressed debt is now paying off handsomely. This investment has returned 24.7% for the year. Our multi-asset strategy, which provides discretion to our investment manager so as to capture returns based on current market performance, has returned 15.9% for the year. Private equity returns (although not counted in the overall portfolio return due to the lack of an appropriate benchmark) have also added to the portfolio’s overall return. Our endowment portfolio ended February with a value of \$78.5 million, up \$2.5 million since the beginning of the fiscal year (net of \$4 million in capital withdrawals). Asset allocations remained stable during the period and within tolerances established by the Foundation’s investment policy statement.

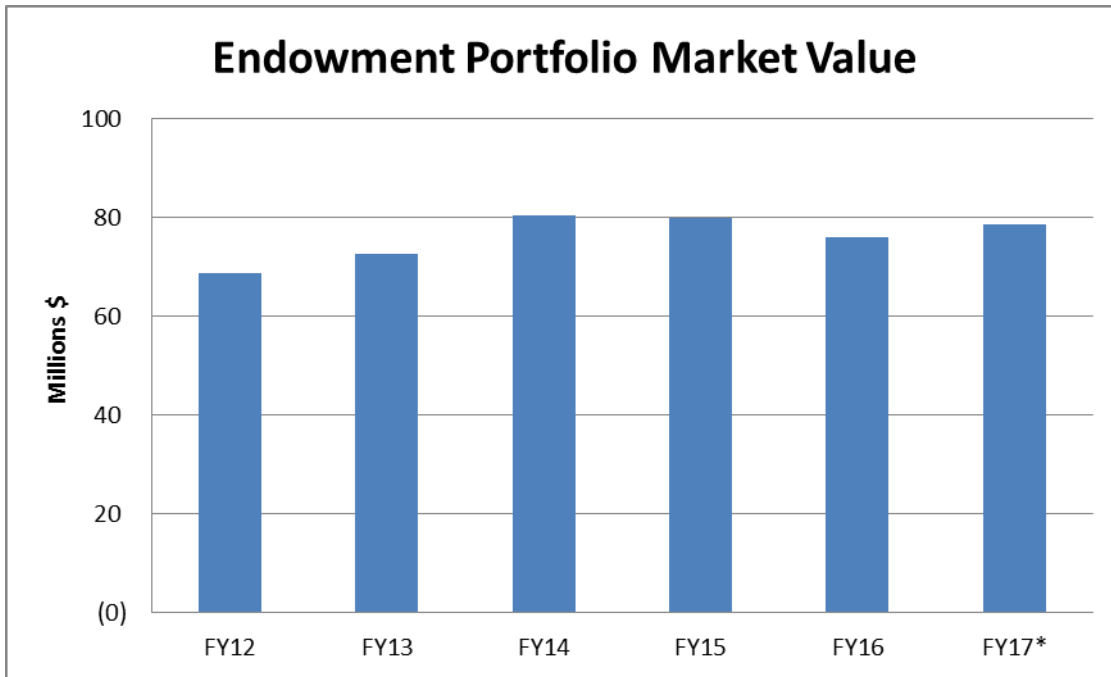
The strongly positive investment gains described above have bolstered the Foundation’s unrestricted net asset position throughout the fiscal year. Our reserve ended the month of February with a value of \$6.6 million, up 26% since last July 1st. The reserve continues to be lower than we would like due to the Foundation’s recent support of the University’s fund-raising campaign, branding initiative, and special events, such as the Tom Hanks visit. A recent University decision to eliminate lease payments to the Foundation for space occupied by University units in the Foundation Building will also likely have a negative impact on the Foundation’s future financial position.

The Foundation’s current endowment portfolio composition, including target allocations, actual allocations, and market values, as of February 28, 2017, is presented below:

Endowment Portfolio Composition

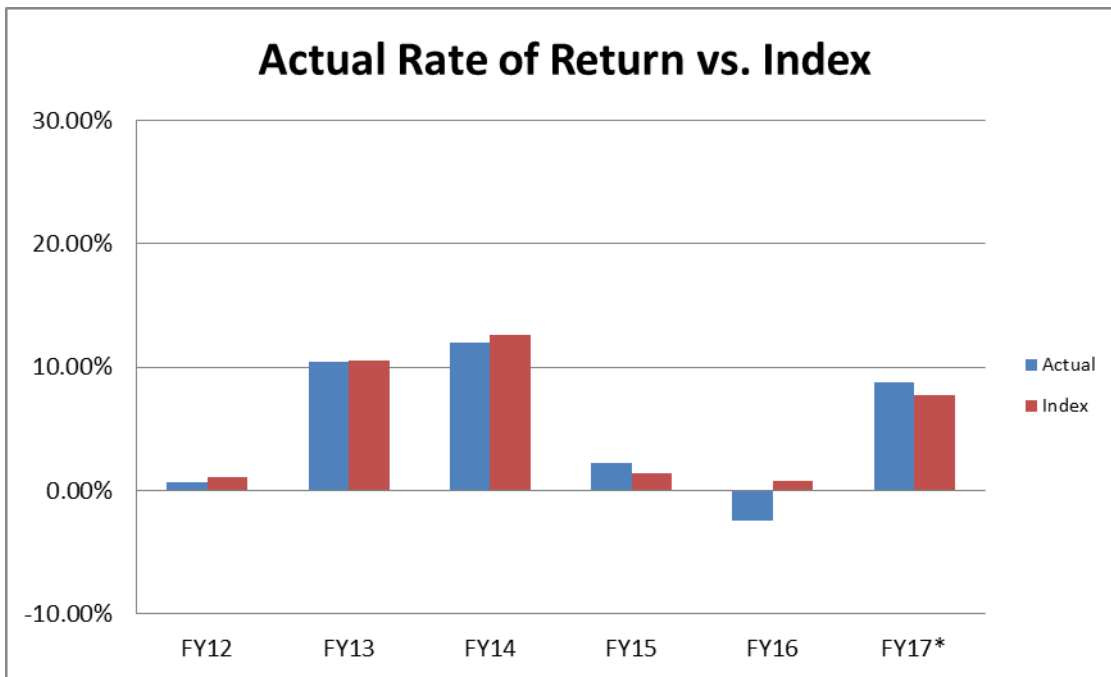
Asset Class	Target Allocation	Actual Allocation	Market Value February 28, 2017
Equity	42%	44%	\$34,275,607
Fixed income	24%	23%	18,016,438
Multi-asset	14%	14%	11,455,787
Hedge funds	8%	8%	6,123,713
Private equity	8%	6%	4,768,232
Energy Debt	4%	5%	3,657,133
Cash & equivalents	0%	0%	251,828
Totals	100%	100%	\$78,548,738

Endowment Value



* Through February 28, 2017

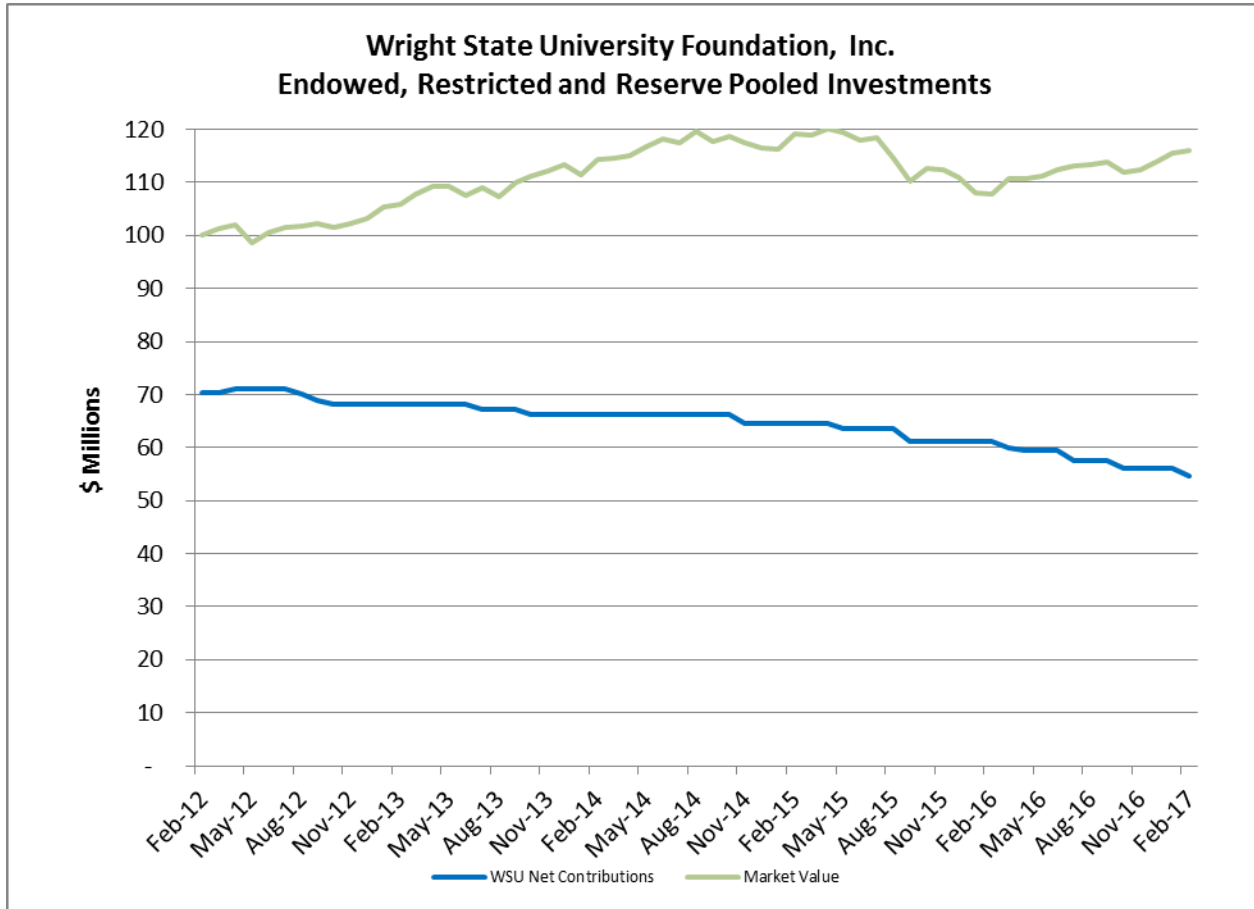
Endowment Historical Rates of Return



* Through February 28, 2017

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 Fundraising Totals By Source and Unit

Fiscal Year-to-Date to February 28, 2017

(including totals from prior fiscal year)

BY SOURCE

SOURCE	CASH ¹	PLEDGES ²	IRREVOCABLE	GIFTS OF	REVOCABLE	CURRENT FYTD	PRIOR FYTD
			DEFERRED	PROPERTY ⁴	DEFERRED		
			GIFTS ³		GIFTS ⁵	TOTALS	TOTALS
Alumni	\$590,650	\$68,900	\$0	\$4,095	\$950,000	\$1,613,645	\$6,141,918
Corporations	740,133	43,000	0	807,249	0	1,590,382	2,585,315
Foundations and Organizations	715,714	0	0	10,102	0	725,816	3,429,556
Friends	446,052	29,395	10,000	25,967	0	511,414	733,993
CURRENT FYTD TOTALS	\$2,492,549	\$141,295	\$10,000	\$847,413	\$950,000	\$4,441,257	
PRIOR FYTD TOTALS	\$2,312,646	\$3,983,989	\$750,000	\$1,612,147	\$4,232,000		\$12,890,782
% CHANGE FROM PRIOR FISCAL YEAR	7.8%	-96.5%	-98.7%	-47.4%	-77.6%	-65.5%	

BY UNIT

UNIT	CASH ¹	PLEDGES ²	IRREVOCABLE	GIFTS OF	REVOCABLE	CURRENT FYTD	PRIOR FYTD
			DEFERRED	PROPERTY ⁴	DEFERRED		
			GIFTS ³		GIFTS ⁵	TOTALS	TOTALS
Boonshoft School of Medicine	\$272,939	\$16,065	\$0	\$614,400	\$0	\$903,404	\$452,541
College of Education & Human Services	20,393	7,417	0	0	0	27,810	58,990
College of Engineering & Computer Science	192,459	10,200	0	0	0	202,659	477,681
College of Liberal Arts	192,457	26,155	0	72,576	0	291,188	438,452
College of Nursing & Health	87,390	10,150	0	4,467	0	102,007	292,379
College of Science & Math	125,417	9,250	0	0	250,000	384,667	4,672,473
Curriculum & Instruction	61,171	50	0	0	0	61,221	15,622
Enrollment Management	36,805	1,260	0	0	0	38,065	61,561
Intercollegiate Athletics	358,615	0	0	0	0	358,615	1,398,379
Lake Campus	21,825	43,125	0	2,000	0	66,950	1,033,676
Other	540,455	17,145	10,000	153,570	0	721,170	1,225,893
Raj Soin College of Business	194,162	50	0	0	450,000	644,212	419,749
School of Professional Psychology	13,850	10	0	0	100,000	113,860	9,425
Student Affairs	122,576	58	0	400	150,000	273,034	76,734
University College	200,000	0	0	0	0	200,000	2,200,100
University Libraries	52,035	360	0	0	0	52,395	57,127
CURRENT FYTD TOTALS	\$2,492,549	\$141,295	\$10,000	\$847,413	\$950,000	\$4,441,257	
PRIOR FYTD TOTALS	\$2,312,646	\$3,983,989	\$750,000	\$1,612,147	\$4,232,000		\$12,890,782
% CHANGE FROM PRIOR FISCAL YEAR	7.8%	-96.5%	-98.7%	-47.4%	-77.6%	-65.5%	

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.

WRIGHT STATE UNIVERSITY FOUNDATION, INC.

Report of Total Receipts: Cash and Gifts-in-Kind
For the Month Ended February 28, 2017 and 2016

MONTH-TO-DATE

GIFT SOURCE	FEB 2017		FEB 2016		PCT. CHANGE	
	DONORS	DOLLARS	DONORS	DOLLARS	DONORS	DOLLARS
Alumni	285	\$35,112	482	\$331,326	-41%	-89%
Corporations	28	95,464	51	101,265	-45%	-6%
Foundations and Organizations	11	235,006	12	84,212	-8%	179%
Friends	387	40,575	231	63,020	68%	-36%
SUBTOTAL CASH RECEIPTS	711	\$406,157	776	\$579,823	-8%	-30%
Gifts-in-kind	12	2,442	16	55,572	-25%	-96%
TOTAL ALL RECEIPTS	723	\$408,599	792	\$635,395	-9%	-36%

FISCAL-YEAR-TO-DATE

GIFT SOURCE	FY2017		FY2016		PCT. CHANGE	
	DONORS	DOLLARS	DONORS	DOLLARS	DONORS	DOLLARS
Alumni	1,429	\$786,008	2,309	\$1,350,411	-38%	-42%
Corporations	208	1,335,502	202	1,681,467	3%	-21%
Foundations and Organizations	61	1,650,310	56	1,746,915	9%	-6%
Friends	1,335	662,070	1,677	898,996	-20%	-26%
SUBTOTAL CASH RECEIPTS	3,033	\$4,433,890	4,244	\$5,677,789	-29%	-22%
Gifts-in-kind	40	847,413	55	1,612,147	-27%	-47%
TOTAL ALL RECEIPTS	3,073	\$5,281,303	4,299	\$7,289,936	-29%	-28%

**Advancement Committee Report
Development Report
March 2017**

Planned Giving Update

For fiscal year 2017 through February, a total of nine planned gifts were closed with a projected value of \$1,815,000. One of the gifts was a charitable gift annuity; the remainder are bequests. Nine additional planned gifts are in discussion with an estimated projected value of \$2,335,000. Twenty-eight planned gifts are in early stage discussions with unknown projected values at this time.

The third of three special events (reception and theatre performance of 9-5) was held on Saturday, March 25th. These events (reception and special seating at the Presidential Lecture with Dan Rather and a basketball game in the President's Suite) were the initial programs conducted with the goal of maintaining engagement with planned giving donors who are members of the Katharine Wright Legacy Society. As donors with long-term gift commitments, this strategic stewardship program was created through Donor Relations to specially steward planned gifts to Wright State.

A direct mail planned giving marketing piece, designed to engender feelings of nostalgia in this, our anniversary, year, was sent to approximately 18,000 alumni, friends, and faculty/staff/retirees in late April. Its goal was to provide information on planned giving options and encourage planned gifts.

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 November 1 and included 12 unique segments. It was customized with students in each academic or interest area. The appeal was 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:

- Encouraged donors to jump 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 to designate gifts to
- Decreased the non-donor segment in an effort to increase ROI

Fall Appeal – Multi-Channel Strategy

Introduced a new Student Development Officer (SDO) multi-channel integrated marketing approach. Seven segments had an SDO featured in the direct mail piece. In addition, there was a video email campaign integrated into the direct mailer. A teaser email was 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.

Fall Appeal Results

90 day results FY17	\$95,165	489 gifts
90 day results FY16	\$83,530	386 gifts

2017 CSIC – Campus Scholarship and Innovation Campaign: 50 Years, See the Change. Be the Impact.

The annual faculty, staff, retiree campaign launched on Thursday, March 9th. Results through week 1, nearly \$200,000 and 22% participation. The 50 day (7 week) campaign will conclude on April 28.

Retiree strategy will be developed with the Retirees Association and solicitation for our retirees will take place in the spring.

2016 results, \$736,000 with 50% participation compared to 2015 results, \$820,049 with 59% participation.

Spring Phonathon

In a year without traditional Phonathon, several strategies will be implemented.

Mini campaigns:

- BSOM, January
- Parents, March and April
- Donors who have historically given through Phonathon in the last three years, March and April

Advancement Committee Report
Rise. Shine. *The Campaign for Wright State University*
March 2017

Comprehensive Campaign Activity

- Gifts and pledges of \$163,342,677 have been recorded as of 1/31/2017
- Tracking of the four donor classifications includes these totals:

Alumni	\$32,952,748	20.2%
Friends	\$38,782,287	23.7%
Corporations	\$76,650,249	46.9%
Foundations	\$14,957,677	9.2%

- Gifts have been committed in these three areas:

Individuals	\$48,157,805	(students and their success)
Environments	\$68,149,670	(capital projects)
Innovations	\$47,035,486	(programmatic investments)

- Types of gifts:

Gifts of cash	\$37,135,253
5-year pledges	\$38,534,138
Planned gifts	\$37,723,391
Gifts in kind	\$49,950,180

Campaign Conclusion: June 30, 2017 (extended from 12/31/16 to record all gifts in current discussion)

Campaign Impact to Date:

- Total donors to Rise. Shine. total 30,681
- First-time donors to the campaign total 17,154
- Total in alumni donors is 12,880 with 5,267 being first-time contributors

Campaign Emphasis:

- Refining strategic initiatives for continuation through the end of the fiscal year (6/30/17)
- Focusing on continuing to raise scholarship support for need-based funds
- Developing fundraising strategies for emphasis post-campaign including the Archives project