

**WRIGHT STATE UNIVERSITY
BOARD OF TRUSTEES**

**Advancement Committee Report
January 2017**

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

**Advancement Committee Report
Alumni Relations Report
January 2017**

Updates:

Alumni Networks and Societies

- Two Alumni Societies were adopted by the Alumni Association in 2016. The LGBTQ & Ally Alumni Society and the Masters of Public Administration Alumni Society
- Due to the success of the Rise.Shine. LA event in 2015 and the Los Angeles Alumni Brunch held in November hosted by Dean Sobolik and attended by 50 local alumni, a new Alumni Network will be proposed to the Alumni Board in 2017.
- The Student Alumni Engagement committee of the Alumni Association board has been enhancing how the Association builds new business with existing and prospective alumni groups. In the last year, this committee has assisted the board with evaluating areas that the Association should be investing resources whether it be geographic or affinity groups and discussing plans for how the AA board could engage alumni that don't fall into one of the existing or prospective network or societies. This committee has also started to support the board efforts to evaluate society and network annual efforts.

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 Friday, September 29 – Sunday, October 1 and will feature at least 6 alumni affinity reunions, including a reunion of the founding classes (1967-1971), as well as our traditional homecoming events.

"I Love Wright State" Postcard Writing Campaign

- In collaboration with the Office of Undergraduate Admissions, the Alumni Association will launch the 2017 alumni postcard writing campaign. Over the past several years, alumni from across the country have hand written postcards to 600-1,000 high school students who have been admitted to Wright State. Students will receive their postcards around Valentine's Day.

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.
 - 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)

Alumni Survey

Over the summer, the Wright State Alumni Association sent an all-alumni survey to more than 43,000 alumni e-mails in its database. The survey was sectioned off into the following segments:

- Raider Country: 26,065 valid e-mails
- Outside Raider Country: 16,582 valid e-mails
- Lake Campus alumni: 981 valid e-mails
- The survey closed on August 1
- The last alumni survey completed by the Association occurred in 2010
- The following are KEY findings as a result of that survey:
 - Alumni are VERY satisfied with their educational experience
 - Alumni have a GOOD overall opinion of/pride in Wright State
 - Our alumni had amazing experiences as students at Wright State
 - Majority of our alumni understand importance of giving to WSU
 - Alumni engage most by reading the WSU Magazine and alumni e-mails
 - Alumni most value communications from their college/dept/major
 - Alumni most value professional development programming/events
 - Most alumni have not been back on campus since graduation—BUT are willing to come back to campus for the right event

The Alumni Association plans to use these findings, and others not mentioned in this report, as a guide in strategic planning for 2017-2018. For any other data having to do with this most recent alumni survey, please contact Nicole Craw in the Office of Alumni Relations.

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

- Jan. 7 – Wright State Annual Beer Tasting post-Men's Basketball game
- Feb. 3 – College Outstanding Alumni Awards dinner
- Feb. 18 – Pregame Gathering in Cleveland WSU vs. CSU Basketball game
- Feb. 11 – Columbus Blue Jackets Game and gathering
- Feb. 24 – CEHS Night at the Raider Men's Basketball game
- Feb. 24 – Alumni Day at the Men's Basketball Game
- Feb. 25 – Rowdy Gras
- March 9 – CONH Alumni Society CEU credit course
- June 10-11 – 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
January 2017**

Through the first five months of FY17, the Foundation’s endowment portfolio has experienced positive absolute and relative earnings. The portfolio’s return was 3.57% for that period, outpacing its composite index by 140 basis points (bps). All asset classes contributed positively to the overall return, although some individual funds have underperformed. Alternative investments were the strongest contributors with a total return of 9.55% (excludes private equity investments). The big winner in this space has been the Energy Debt fund which has returned 16.63% so far this year. Our hedge fund has also performed well year-to-date, something we haven’t been able to say for a while. Its return for the fiscal year was just under 6% as of November 30th. Our stock investments have also performed well (+4.38%) with domestic shares outperforming international. Within the domestic space, small cap has outperformed large cap, 11.79% vs. 6.92%, respectively. Earnings on our fixed income investments are flat, with most returns coming from our high yield investment. Losses in emerging markets debt have acted to offset those gains. Longer term returns continue to reflect underperformance when compared to indices; however, the gap is narrowing. Our endowment portfolio ended November with a value of \$74.8 million, down \$1.3 million since the beginning of the fiscal year (includes \$4 million in capital withdrawals). Asset allocations remained stable during the period and within tolerances established by the Foundation’s investment policy statement.

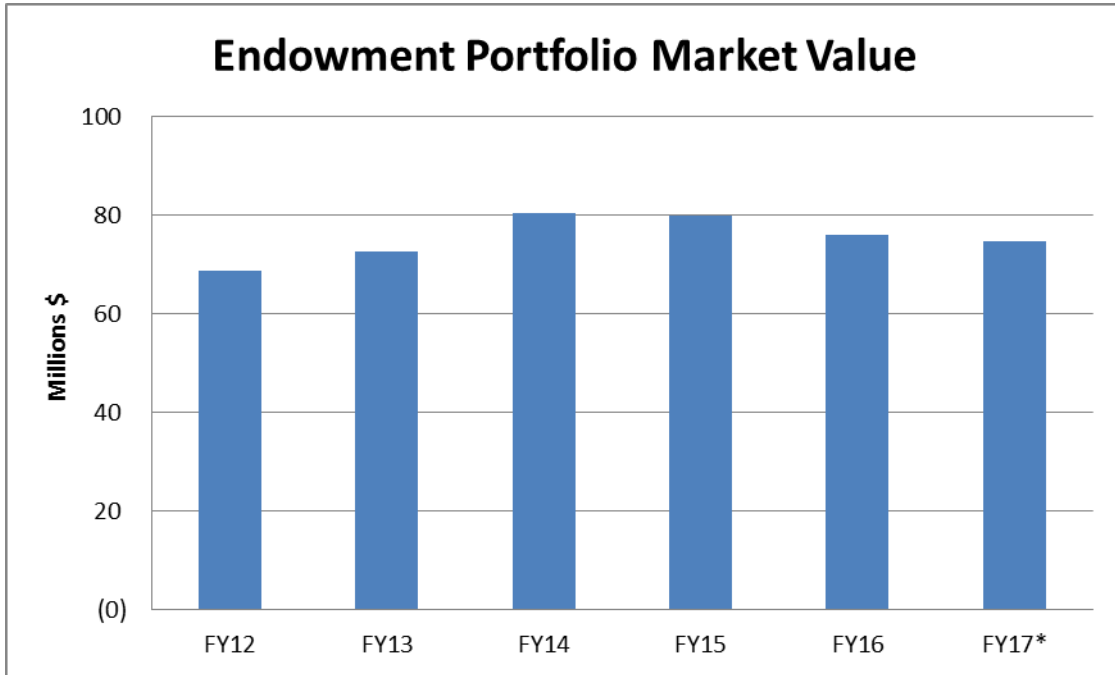
Investment gains described above contributed to a 5.2% increase in the Foundation’s reserve position. The Foundation’s unrestricted net assets balance (which we use as proxy for our reserve) ended the first five months of FY17 at \$5.5 million, up \$0.3 million over the end of the previous fiscal year. 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. 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 target allocation, actual allocation, and market values as of November 30, 2016, are presented below:

Endowment Portfolio Composition

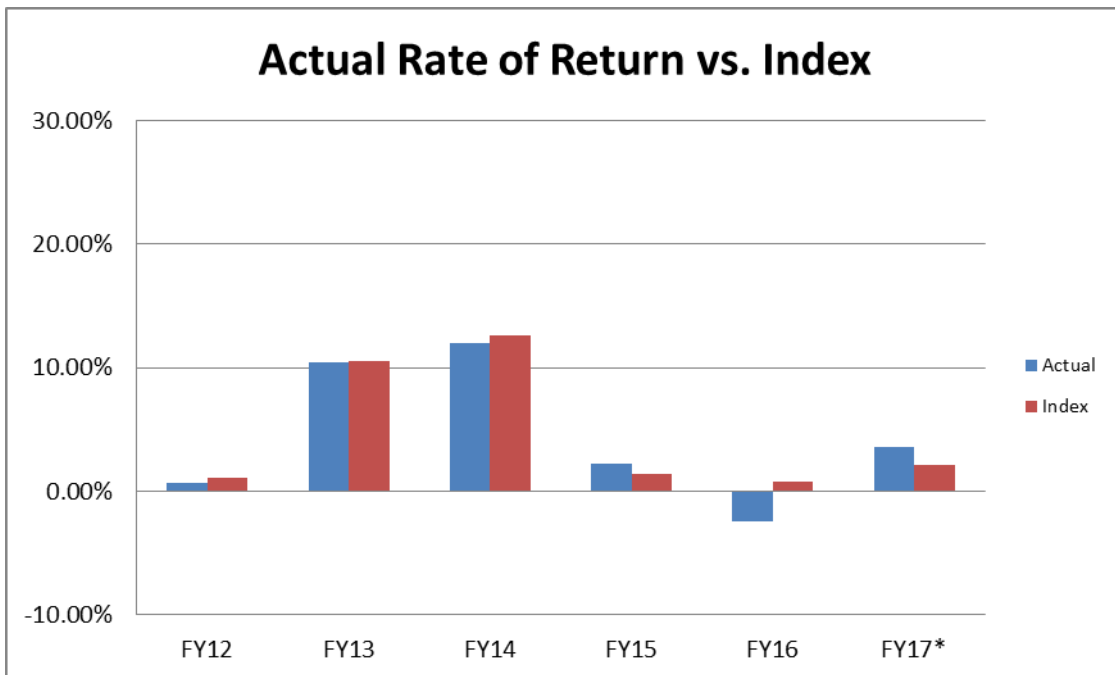
Asset Class	Target Allocation	Actual Allocation	Market Value November 30, 2016
Equity	52%	54%	\$39,976,923
Fixed income	28%	27%	20,495,210
Hedge funds	8%	8%	6,073,976
Private equity	8%	6%	4,608,368
Energy Debt	4%	5%	3,421,304
Cash & equivalents	0%	0%	251,828
Totals	100%	100%	\$74,827,609

Endowment Value



* Through November 30, 2016

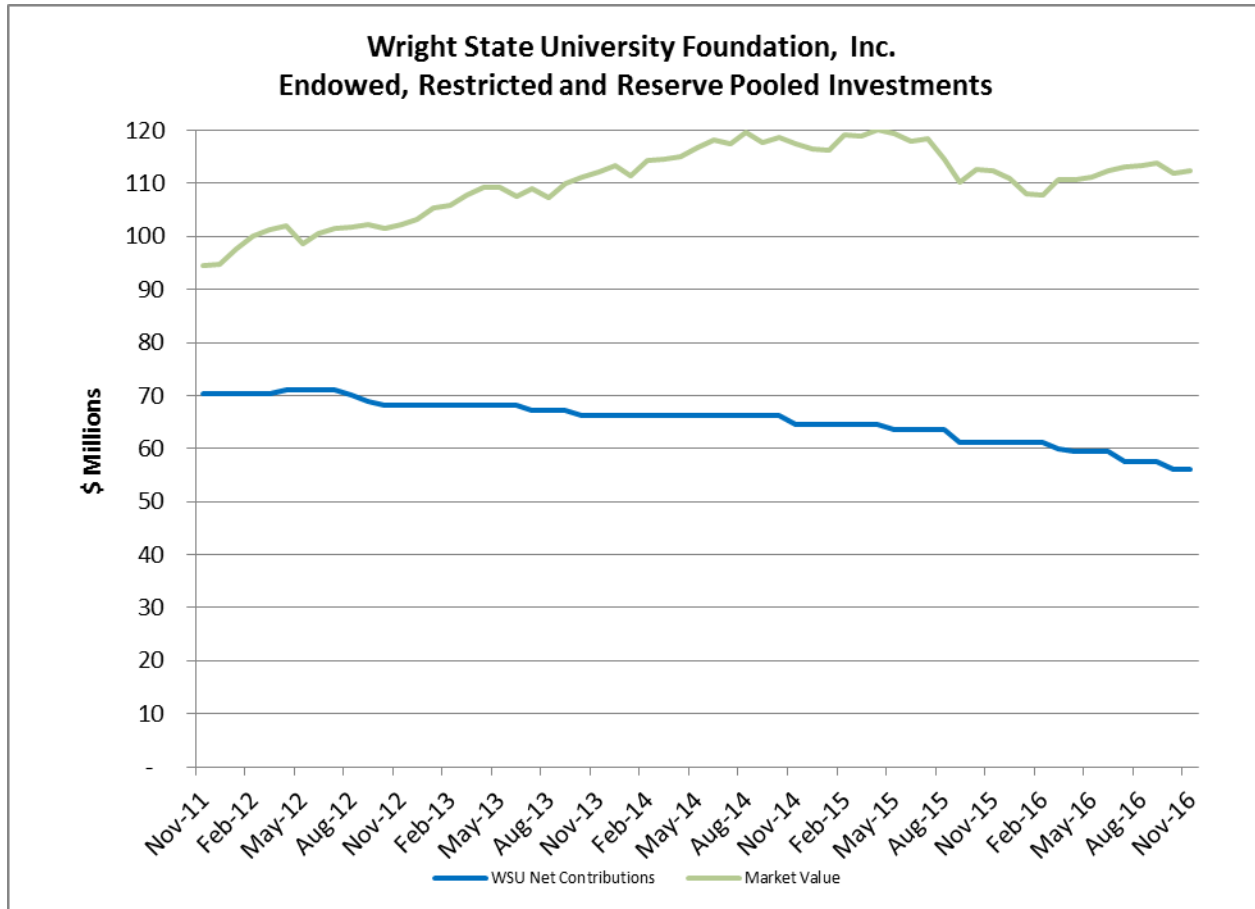
Endowment Historical Rates of Return



* Through November 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 Fundraising Totals By Source and Unit

Fiscal Year-to-Date to November 30, 2016

(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 ³	TOTALS	TOTALS
Alumni	\$301,234	\$35,555	\$0	\$3,150	\$950,000	\$1,289,939	\$3,196,366
Corporations	368,988	18,000	0	131,817	0	518,805	2,287,539
Foundations and Organizations	362,922	0	0	0	0	362,922	2,961,312
Friends	226,825	21,305	0	22,079	0	270,209	355,022
CURRENT FYTD TOTALS	\$1,259,969	\$74,860	\$0	\$157,046	\$950,000	\$2,441,875	
PRIOR FYTD TOTALS	\$1,245,572	\$3,346,363	\$0	\$1,521,304	\$2,687,000		\$8,800,239
% CHANGE FROM PRIOR FISCAL YEAR	1.2%	-97.8%	N/A	-89.7%	-64.6%	-72.3%	

BY UNIT

UNIT	CASH ¹	PLEDGES ²	IRREVOCABLE	GIFTS OF	REVOCABLE	CURRENT FYTD	PRIOR FYTD
			DEFERRED	PROPERTY ⁴	DEFERRED		
			GIFTS ³		GIFTS ³	TOTALS	TOTALS
Boonshoft School of Medicine	\$106,927	\$1,350	\$0	\$0	\$0	\$108,277	\$307,985
College of Education & Human Services	8,449	0	0	0	0	8,449	17,495
College of Engineering & Computer Science	126,559	10,000	0	0	0	136,559	170,786
College of Liberal Arts	85,033	12,975	0	33,679	0	131,687	171,945
College of Nursing & Health	7,060	10,150	0	4,467	0	21,677	272,385
College of Science & Math	85,146	9,250	0	0	250,000	344,396	3,390,867
Curriculum & Instruction	44,975	50	0	0	0	45,025	4,433
Enrollment Management	10,650	565	0	0	0	11,215	15,812
Intercollegiate Athletics	151,226	0	0	0	0	151,226	219,106
Lake Campus	20,075	18,000	0	2,000	0	40,075	885,505
Other	387,609	12,375	0	116,500	0	516,484	992,019
Raj Soin College of Business	102,237	0	0	0	450,000	552,237	281,585
School of Professional Psychology	11,230	10	0	0	100,000	111,240	6,885
Student Affairs	85,148	0	0	400	150,000	235,548	52,936
University College	0	0	0	0	0	0	2,000,100
University Libraries	27,645	135	0	0	0	27,780	10,395
CURRENT FYTD TOTALS	\$1,259,969	\$74,860	\$0	\$157,046	\$950,000	\$2,441,875	
PRIOR FYTD TOTALS	\$1,245,572	\$3,346,363	\$0	\$1,521,304	\$2,687,000		\$8,800,239
% CHANGE FROM PRIOR FISCAL YEAR	1.2%	-97.8%	N/A	-89.7%	-64.6%	-72.3%	

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 November 30, 2016 and 2015**

MONTH-TO-DATE

GIFT SOURCE	NOV 2016		NOV 2015		PCT. CHANGE	
	DONORS	DOLLARS	DONORS	DOLLARS	DONORS	DOLLARS
Alumni	479	\$45,694	633	\$94,635	-24%	-52%
Corporations	31	137,490	33	171,343	-6%	-20%
Foundations and Organizations	6	517,250	10	651,153	-40%	-21%
Friends	452	62,876	531	50,220	-15%	25%
<i>SUBTOTAL CASH RECEIPTS</i>	968	\$763,310	1,207	\$967,351	-20%	-21%
Gifts-in-kind	1	20,000	9	150,685	-89%	-87%
<i>TOTAL ALL RECEIPTS</i>	969	\$783,310	1,216	\$1,118,036	-20%	-30%

FISCAL-YEAR-TO-DATE

GIFT SOURCE	FY2017		FY2016		PCT. CHANGE	
	DONORS	DOLLARS	DONORS	DOLLARS	DONORS	DOLLARS
Alumni	941	\$422,094	1,509	\$698,109	-38%	-40%
Corporations	111	762,906	115	1,242,324	-3%	-39%
Foundations and Organizations	32	892,122	29	1,386,671	10%	-36%
Friends	875	307,707	1,134	423,857	-23%	-27%
<i>SUBTOTAL CASH RECEIPTS</i>	1,959	\$2,384,829	2,787	\$3,750,961	-30%	-36%
Gifts-in-kind	11	157,046	17	1,521,304	-35%	-90%
<i>TOTAL ALL RECEIPTS</i>	1,970	\$2,541,875	2,804	\$5,272,265	-30%	-52%

Advancement Committee Report Development Report January 2017

Planned Giving Update

In the first six months of the fiscal year, five new and three re-characterized planned gifts were received. Their projected value is \$1,515,000. One of the gifts was a charitable gift annuity; the remainder are bequests.

There are an additional seven planned gifts in discussion with an estimated projected value of \$1.2 million. An additional 28 possible planned gifts are in early stage discussions with unknown projected values at this time.

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:

- Encourage 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
- Decrease 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

30 day results FY17	\$36,560	248 gifts
30 day results FY16	\$24,147	220 gifts

#GivingTuesday

We once again participated in #GivingTuesday to increase student philanthropy and education of philanthropy for Wright State. #GivingTuesday took place on Tuesday, November 29 with a similar approach to 2015. An e-solicitation campaign targeted at alumni giving was initiated and an on campus fun event was held during the lunch period on the 29th, targeted towards the education of philanthropy with our students.

#GivingTuesday Results

2016 (CY)	\$10,717, 129 donors
2015 (CY)	\$7,800, 75 donors

2016 CSIC – Campus Scholarship and Innovation Campaign

FY16 results \$508,903, a slight decrease compared to FY15 at the end of the fiscal year. In addition, at the end of the fiscal year 2016, participation was 48% from full time faculty and staff.

November 2016, \$663,483 with 50% participation and as of November 2015, \$634,800 with 57% participation. 2016 CSIC results will be calculated through December 31, 2016.

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

Comprehensive Campaign Activity

- Gifts and pledges of \$161,723,398 have been recorded as of 11/30/2016
- Tracking of the four donor classifications includes these totals:

Alumni	\$32,653,823	20.2%
Friends	\$38,569,063	23.8%
Corporations	\$75,763,722	46.8%
Foundations	\$14,826,789	9.2%

- Gifts have been committed in these three areas:

Individuals	\$47,552,261	(students and their success)
Environments	\$67,460,996	(capital projects)
Innovations	\$46,710,141	(programmatic investments)

- Types of gifts:

Gifts of cash	\$36,264,539
5-year pledges	\$38,483,212
Planned gifts	\$37,713,391
Gifts in kind	\$49,262,255

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

Campaign Impact to Date:

- Rise. Shine. received gifts from alumni and friends in all 50 states and 13 countries!
- Faculty/staff/retiree giving during the campaign was \$11,584,248!
- Total first-time donors to Wright State University 16,783!

Campaign Emphasis:

- Refining strategic initiatives for continuation through the end of the fiscal year (6/30/17)
- Focusing on finishing gift discussions for inclusion in Rise. Shine.
- Identifying ideas for continuation as mini-campaigns following the conclusion of the campaign.