

**WRIGHT STATE UNIVERSITY  
BOARD OF TRUSTEES**

**Advancement Committee Report  
September 2017**

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

# **Advancement Committee Report**

## **Alumni Relations Report**

### **September 2017**

#### **Updates:**

##### **Life After Wright State**

- This past spring, the Alumni Association continued its efforts to engage graduating seniors (soon-to-be alumni) in our Life After Wright State series. This year, we engaged 788 students over the course of 7 different professional development, social, and career focused programs. Some of the Life After Wright State programs included bringing NYT Bestselling Author, Kelly William Brown, to campus to talk about “Adulting”, the Alumni Association’s Annual Senior Picnic, and our second annual student and alumni speed networking dinner.

##### **Washington DC Alumni Tour**

- The Washington DC Alumni Tour was August 24-27. This was the first alumni tour of its kind for the Wright State Alumni Association. The DC Alumni Tour had a total of 24 attendees and included stops to Thomas Jefferson’s Monticello, George Washington’s Mount Vernon, the new National African American History and Cultural Museum, and much more. The tour was led by Wright State Professor of History, Dr. Noeleen McIlveena (Dr. No), who provided commentary prior to arriving at each of the historic sites.

##### **1967 Society**

- The Wright State Alumni Association and the Annual Giving office has joined efforts with respect to student engagement to establish the ’67 Society. This new student organization, previously the Student Alumni Association and Student Philanthropy Council, has 3 focus areas, which are, alumni and student engagement, establishing a culture of philanthropy amongst students, and building a stronger campus community and pride. The ’67 Society is a closed-membership organization that aspires to be one of the premier student organizations on Wright State’s campus in the future. The organization currently has 15 members and has multiple events coming up this fall which include their annual “Nearly Naked Mile” run/clothing drive and their first annual “Wright Day to Give” event on campus.

#### **Upcoming Event Updates:**

##### **The 50<sup>th</sup> Anniversary of Wright State**

- Many of the events that the Alumni Relations team and Alumni Association are planning this year will promote the 50<sup>th</sup> 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

#### Annual Bourbon Tour

The 7th Annual Bourbon Tour is scheduled for October 7-8th. This highly anticipated trip sells out each year and currently only has 2 spots remaining. This year's trip includes visits to Bluegrass Distilling Company, Town Branch Distillery, and Maker's Mark, which currently has a Dale Chihuly exhibit on display. This trip usually generates revenue for the Alumni Association.

#### Wright State Alumni Service Day – November 11

All Alumni, family, and friends are encouraged to join the Wright State Alumni Association for Wright State Alumni Service Day to engage in meaningful community service at one of the local nonprofit sites.

- Food Bank
- Hospice of Dayton
- Metro Parks
- Xenia Community Center

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

Sept. 12 – Hire Southwest Ohio Alumni-Only Career Fair  
Sept. 13 – Social Work Alumni Society Beer & Wine Tasting  
Sept. 29 – NLA Alumni Society Meet and Greet  
Sept. 29 – Oct. 1 – Homecoming 2017, Wright State 50th Anniversary  
Oct. 7 – Oct 8 – Bourbon Tour  
November 1 – CONH Alumni Society Champagne Tasting  
November 11 – Wright State Alumni Service Day  
November 17 – NLA Alumni Society Holiday Party  
Feb. 24, 2018 – Rowdy Gras  
July 29, 2018 – Wright State Alumni Kings Island Day

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

Financial market returns were strongly positive during FY17. Our endowment portfolio returned 12.12% (net of fees) during the period, besting its composite index by 86 basis points (bps). Our 3-, 5- and 10-year returns were +3.79%, +6.72% and +3.84%, respectively, at the end of June. Each lagged their respective benchmark. All our investments contributed positively to the annual return except for one. Our Multi-Asset Real Return Fund lost 1.43% for the year, but this fund is designed as a hedge against inflation so we maintain the position in anticipation of that eventuality.

Equities were the strongest performers for the year returning +17.27%. World equities outpaced domestic stocks, +19.87% to +14.73%. Within the global space, emerging markets jumped 26% for the year. Within domestic markets, small cap shares increased 18.18%. Fixed income returns for the year were a solid 4.46%, with high yield bond returns providing the strongest returns at 14.16%. Alternative investments returns were also strongly positive with our distressed debt investment posting a +24.10% return and hedge funds, +10.15%. Private equity investments added 16 bps to our total net return. The Foundation will be considering further private equity investments at its next regularly scheduled meeting. Asset allocations during the year remained stable and within tolerances established by the Foundation's investment policy statement.

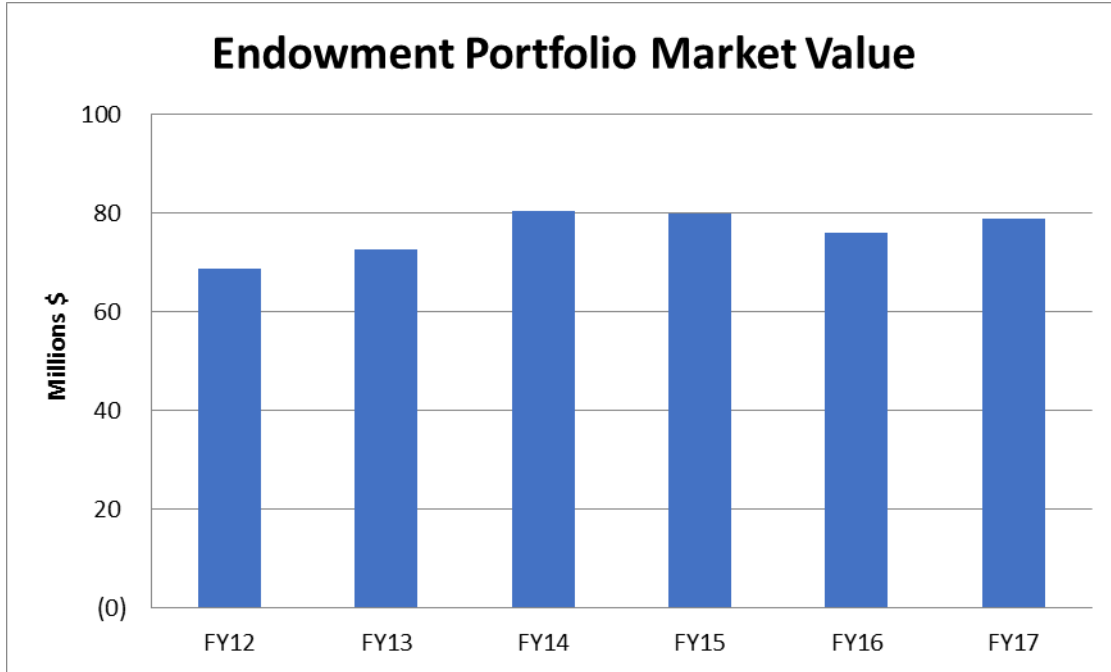
The strong investment performance described above resulted in a significant increase in our unrestricted net assets balance. This figure (which we consider our reserve) grew an impressive 45% due to investment performance and controlled spending. Unrestricted net assets were \$7.5 million at June 30, 2017 as compared to \$5.2 million at the end of FY16. 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 and Science Olympiad.

The Foundation's current endowment portfolio composition, including target allocations, actual allocations, and market values, as of June 30, 2017, is presented below:

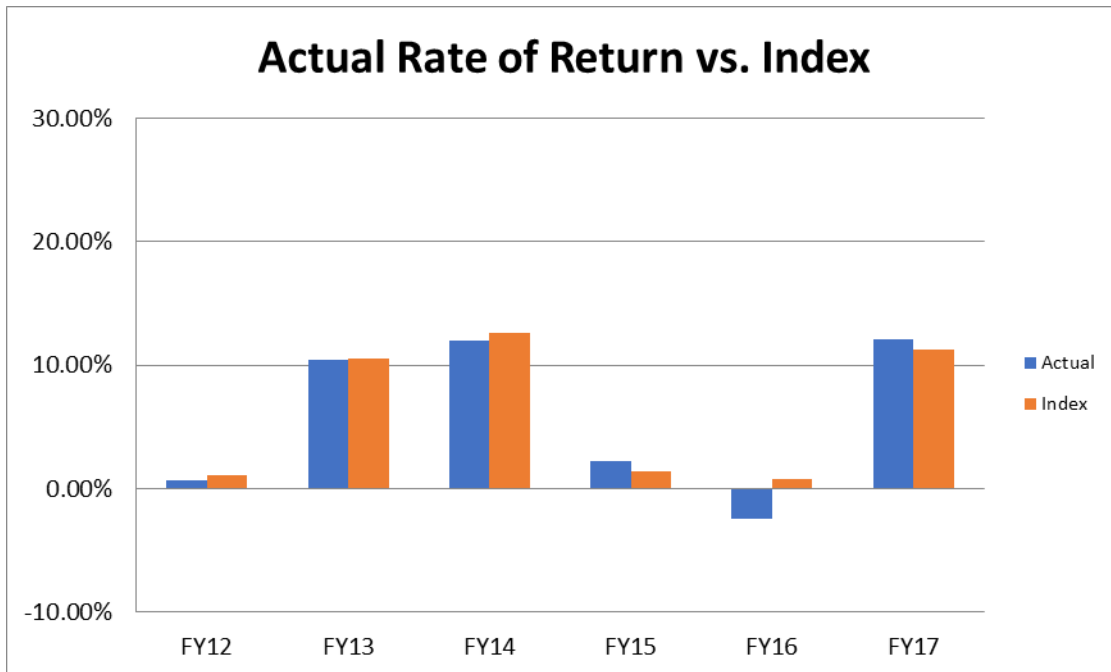
**Endowment Portfolio Composition**

| <b>Asset Class</b>            | <b>Target Allocation</b> | <b>Actual Allocation</b> | <b>Market Value<br/>June 30, 2017</b> |
|-------------------------------|--------------------------|--------------------------|---------------------------------------|
| <b>Equity</b>                 | <b>42%</b>               | <b>45%</b>               | <b>\$35,920,706</b>                   |
| <b>Fixed income</b>           | <b>24%</b>               | <b>22%</b>               | <b>17,640,661</b>                     |
| <b>Multi-asset</b>            | <b>14%</b>               | <b>13%</b>               | <b>10,011,694</b>                     |
| <b>Hedge funds</b>            | <b>8%</b>                | <b>8%</b>                | <b>6,316,338</b>                      |
| <b>Private equity</b>         | <b>8%</b>                | <b>7%</b>                | <b>5,281,179</b>                      |
| <b>Energy Debt</b>            | <b>4%</b>                | <b>5%</b>                | <b>3,640,506</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>\$78,811,084</b>                   |

## Endowment Value

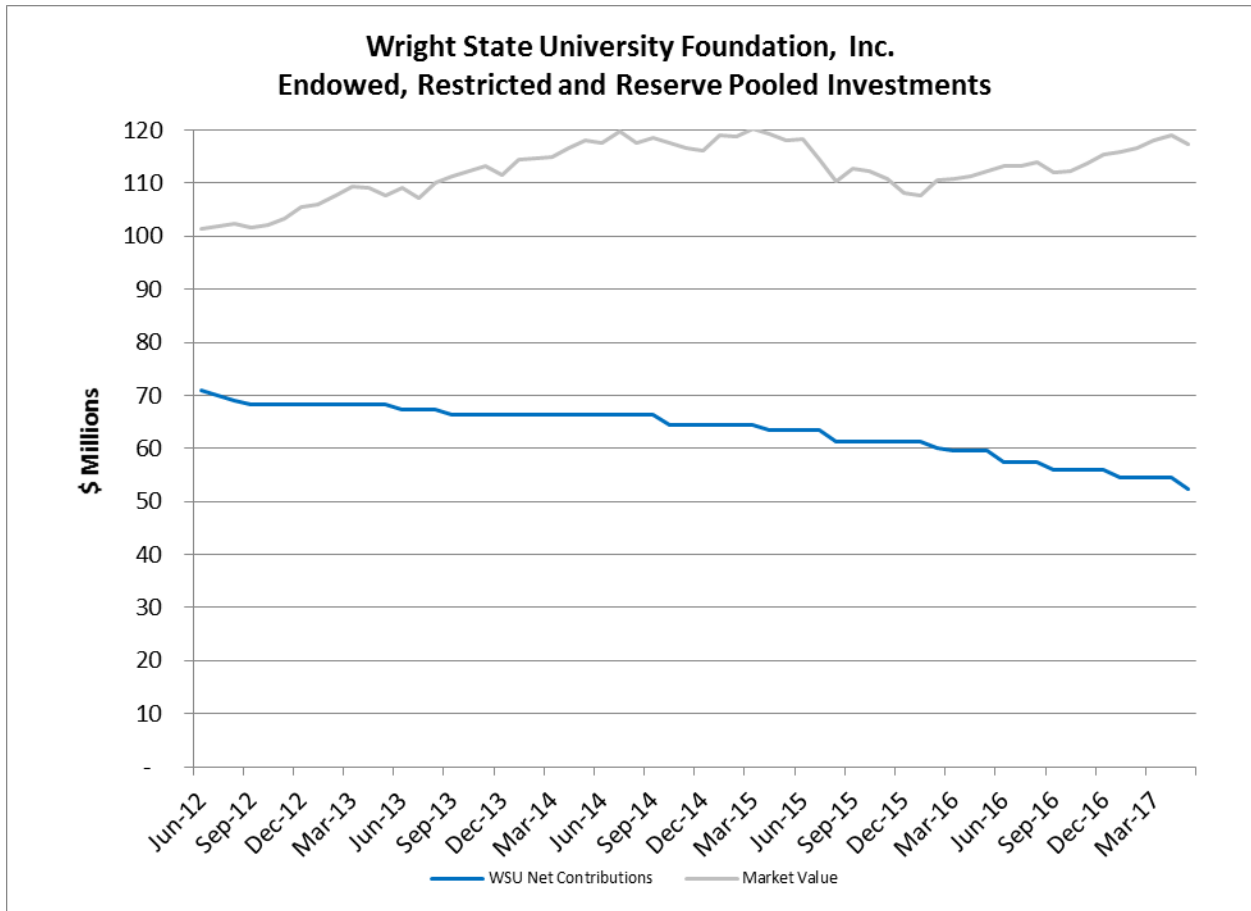


## Endowment Historical Rates of Return



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 June 30, 2017**

(including totals from prior fiscal year)

**BY SOURCE**

| SOURCE                                 | CASH <sup>1</sup>  | PLEDGES <sup>2</sup> | IRREVOCABLE<br>DEFERRED<br>GIFTS <sup>3</sup> | GIFTS OF<br>PROPERTY <sup>4</sup> | REVOCABLE<br>DEFERRED<br>GIFTS <sup>5</sup> | CURRENT FYTD       | PRIOR FYTD          |
|--|--------------------|----------------------|---|-----------------------------------|---|--------------------|---------------------|
|  |                    |                      |   |                                   |   | TOTALS             | TOTALS              |
| Alumni                                 | \$878,259          | \$188,532            | \$0   | \$4,642                           | \$1,533,000                                 | \$2,604,433        | \$6,965,486         |
| Corporations                           | 1,057,726          | 1,933,000            | 0   | 837,431                           | 0   | 3,828,157          | 11,046,409          |
| Foundations and Organizations          | 1,203,928          | 1,500                | 0   | 33,696                            | 0   | 1,239,124          | 3,850,049           |
| Friends                                | 781,726            | 92,664               | 10,000  | 135,978                           | 120,000                                     | 1,140,368          | 4,603,857           |
| <b>CURRENT FYTD TOTALS</b>             | <b>\$3,921,639</b> | <b>\$2,215,696</b>   | <b>\$10,000</b>                               | <b>\$1,011,747</b>                | <b>\$1,653,000</b>                          | <b>\$8,812,082</b> |                     |
| <b>PRIOR FYTD TOTALS</b>               | <b>\$3,744,153</b> | <b>\$5,312,320</b>   | <b>\$750,000</b>                              | <b>\$9,412,328</b>                | <b>\$7,247,000</b>                          |                    | <b>\$26,465,801</b> |
| <b>% CHANGE FROM PRIOR FISCAL YEAR</b> | <b>4.7%</b>        | <b>-58.3%</b>        | <b>-98.7%</b>                                 | <b>-89.3%</b>                     | <b>-77.2%</b>                               | <b>-66.7%</b>      |                     |

**BY UNIT**

| UNIT                                      | CASH <sup>1</sup>  | PLEDGES <sup>2</sup> | IRREVOCABLE<br>DEFERRED<br>GIFTS <sup>3</sup> | GIFTS OF<br>PROPERTY <sup>4</sup> | REVOCABLE<br>DEFERRED<br>GIFTS <sup>5</sup> | CURRENT FYTD       | PRIOR FYTD          |
|---|--------------------|----------------------|---|-----------------------------------|---|--------------------|---------------------|
|   |                    |                      |   |                                   |   | TOTALS             | TOTALS              |
| Boonshoft School of Medicine              | \$521,838          | \$24,942             | \$0   | \$614,400                         | \$0   | \$1,161,180        | \$2,120,939         |
| College of Education & Human Services     | 85,372             | 18,244               | 0   | 0                                 | 0   | 103,616            | 84,549              |
| College of Engineering & Computer Science | 307,221            | 689,930              | 0   | 0                                 | 0   | 997,151            | 2,683,560           |
| College of Liberal Arts                   | 426,950            | 41,806               | 0   | 222,888                           | 70,000                                      | 761,644            | 976,598             |
| College of Nursing & Health               | 105,311            | 1,233,421            | 0   | 17,666                            | 200,000                                     | 1,556,398          | 572,022             |
| College of Science & Math                 | 157,921            | 52,021               | 0   | 0                                 | 350,000                                     | 559,942            | 10,918,677          |
| Curriculum & Instruction                  | 112,639            | 32,622               | 0   | 0                                 | 0   | 145,261            | 28,993              |
| Enrollment Management                     | 43,915             | 2,545                | 0   | 0                                 | 0   | 46,460             | 133,159             |
| Intercollegiate Athletics                 | 459,781            | 6,178                | 0   | 0                                 | 0   | 465,959            | 1,637,139           |
| Lake Campus                               | 212,780            | 46,100               | 0   | 2,000                             | 0   | 260,880            | 1,407,223           |
| Other                                     | 738,361            | 52,856               | 10,000  | 153,669                           | 10,000                                      | 964,886            | 1,748,652           |
| Raj Soin College of Business              | 318,250            | 6,620                | 0   | 0                                 | 483,000                                     | 807,870            | 494,957             |
| School of Professional Psychology         | 15,496             | 1,292                | 0   | 0                                 | 100,000                                     | 116,788            | 146,380             |
| Student Affairs                           | 156,550            | 3,973                | 0   | 1,025                             | 440,000                                     | 601,548            | 124,132             |
| University College                        | 200,296            | 185                  | 0   | 0                                 | 0   | 200,481            | 3,300,692           |
| University Libraries                      | 58,958             | 2,961                | 0   | 99                                | 0   | 62,018             | 88,129              |
| <b>CURRENT FYTD TOTALS</b>                | <b>\$3,921,639</b> | <b>\$2,215,696</b>   | <b>\$10,000</b>                               | <b>\$1,011,747</b>                | <b>\$1,653,000</b>                          | <b>\$8,812,082</b> |                     |
| <b>PRIOR FYTD TOTALS</b>                  | <b>\$3,744,153</b> | <b>\$5,312,320</b>   | <b>\$750,000</b>                              | <b>\$9,412,328</b>                | <b>\$7,247,000</b>                          |                    | <b>\$26,465,801</b> |
| <b>% CHANGE FROM PRIOR FISCAL YEAR</b>    | <b>4.7%</b>        | <b>-58.3%</b>        | <b>-98.7%</b>                                 | <b>-89.3%</b>                     | <b>-77.2%</b>                               | <b>-66.7%</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.

**WRIGHT STATE UNIVERSITY FOUNDATION, INC.**

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

**For the Month Ended June 30, 2017 and 2016**

**MONTH-TO-DATE**

| GIFT SOURCE                   | JUN 2017     |                  | JUN 2016     |                    | PCT. CHANGE |             |
|-------------------------------|--------------|------------------|--------------|--------------------|-------------|-------------|
|                               | DONORS       | DOLLARS          | DONORS       | DOLLARS            | DONORS      | DOLLARS     |
| Alumni                        | 606          | \$120,525        | 633          | \$100,102          | -4%         | 20%         |
| Corporations                  | 36           | 316,710          | 69           | 435,724            | -48%        | -27%        |
| Foundations and Organizations | 14           | 347,891          | 18           | 53,475             | -22%        | 551%        |
| Friends                       | 509          | 122,529          | 483          | 291,125            | 5%          | -58%        |
| <b>SUBTOTAL CASH RECEIPTS</b> | <b>1,165</b> | <b>\$907,655</b> | <b>1,203</b> | <b>\$880,426</b>   | <b>-3%</b>  | <b>3%</b>   |
| Gifts-in-kind                 | 2            | 175              | 11           | 1,540,353          | -82%        | -100%       |
| <b>TOTAL ALL RECEIPTS</b>     | <b>1,167</b> | <b>\$907,830</b> | <b>1,214</b> | <b>\$2,420,779</b> | <b>-4%</b>  | <b>-62%</b> |

**FISCAL-YEAR-TO-DATE**

| GIFT SOURCE                   | FY2017       |                    | FY2016       |                     | PCT. CHANGE |             |
|-------------------------------|--------------|--------------------|--------------|---------------------|-------------|-------------|
|                               | DONORS       | DOLLARS            | DONORS       | DOLLARS             | DONORS      | DOLLARS     |
| Alumni                        | 2,238        | \$1,170,971        | 3,410        | \$1,711,588         | -34%        | -32%        |
| Corporations                  | 290          | 2,311,445          | 337          | 2,919,691           | -14%        | -21%        |
| Foundations and Organizations | 91           | 2,145,024          | 96           | 2,092,696           | -5%         | 3%          |
| Friends                       | 2,011        | 1,054,445          | 2,346        | 1,496,175           | -14%        | -30%        |
| <b>SUBTOTAL CASH RECEIPTS</b> | <b>4,630</b> | <b>\$6,681,885</b> | <b>6,189</b> | <b>\$8,220,150</b>  | <b>-25%</b> | <b>-19%</b> |
| Gifts-in-kind                 | 103          | 1,011,747          | 143          | 9,412,328           | -28%        | -89%        |
| <b>TOTAL ALL RECEIPTS</b>     | <b>4,733</b> | <b>\$7,693,632</b> | <b>6,332</b> | <b>\$17,632,478</b> | <b>-25%</b> | <b>-56%</b> |



## **Advancement Committee Report Development Report September 2017**

### **Annual Giving Update**

Annual gift solicitation (gifts of up to \$10,000), building off the momentum of the Rise. Shine. Campaign, engaging more and more donors with Wright State, increasing current individual giving levels, and identifying new major gift prospects.

### **Spring Phonathon**

In a year without traditional Phonathon, several strategies were implemented.

Mini campaigns:

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

Results: \$39,935 with 319 donors resulting in a fulfillment rate of 78%.

### **Spring FY17 Direct Mail Appeal**

- |                       |          |           |
|-----------------------|----------|-----------|
| ➤ 90 day results FY17 | \$92,280 | 683 gifts |
| ➤ 90 day results FY16 | \$68,871 | 490 gifts |
| ➤ 90 day results FY15 | \$53,902 | 372 gifts |

### **2017 Faculty, Staff & Retiree Campaign**

- |                     |           |   |
|---------------------|-----------|---|
| ➤ 6/30/2017 Results | \$379,147 | 44% participation among Full-time Staff & Faculty |
| ➤ 6/30/2016 Results | \$508,903 | 48% participation among Full-time Staff & Faculty |
| ➤ 6/30/2015 Results | \$523,138 | 57% participation among Full-time Staff & Faculty |

2017 results will be calculated through December 31, 2017.

- |                      |           |   |
|----------------------|-----------|---|
| ➤ 2016 Final Results | \$736,428 | 50% participation among Full-time Staff & Faculty |
|----------------------|-----------|---|

### **The Wright Day to Give – September 30 – October 2**

In honor of our 50<sup>th</sup> birthday, Wright State will launch its first-ever stand-alone giving day, a digital philanthropic challenge to our alumni, friends, parents, students, faculty, and staff. Engage with their alma mater, Wright State, for a day that will bring together ALL Raiders.

- 50 years, 50 hours to make an impact
- September 30 – October 2
  - Homecoming weekend
- Participation goal versus dollars – 500 donors in 50 hours
- Student giving component during Wright Brothers Day

Use a tactical marketing campaign (Phonathon, direct mail, email, and videos) to solicit donations reaching an internal dollar goal of \$50,000 in a 50-hour period. The public goal will be advertised as 500 donors in 50 hours.

#### **Objectives**

- To continue to encourage Wright State University's alumni giving, following the success of the Rise. Shine. Campaign
- To encourage participation in Giving Day events by emphasizing its uniqueness and 50<sup>th</sup> Anniversary significance
- To increase alumni engagement by demonstrating Wright State pride to all alumni audiences
- Encourage our students to give back to Wright State

### **Fall Direct Mail Appeal**

The annual fall direct mail appeal will begin on October 31. It will be customized with student features in each academic area. The primary audience for Fall Appeal is alumni, however, without a traditional Phonathon in FY18, this appeal will also be sent to friends who are donors in addition to a thank you segment for our donors who made a gift during our Wright Day to Give.

#### **Strategies**

- Continue to personalize, including suggested giving amounts based on historical giving
  - Provide current donor club, if applicable
- New strategy in FY18
  - Expand our appeal to include a historical timeline featuring some of Wright State University biggest milestones in our 50<sup>th</sup> anniversary year.
  - Expand our audience in recognition of our 50<sup>th</sup> anniversary

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

**Campaign Totals as of 6/30/17**

- We concluded the campaign on June 30, 2017 with a final gift total of **\$167,742,525.68**.
- We exceeded the goal of \$150,000,000 by 11.8%
  
- Tracking of the four donor classifications includes these totals:

|              |              |       |
|--------------|--------------|-------|
| Alumni       | \$34,047,648 | 20.3% |
| Friends      | \$38,964,810 | 23.2% |
| Corporations | \$78,991,076 | 47.1% |
| Foundations  | \$15,738,991 | 9.4%  |
  
- Gifts have been committed in these three areas:

|              |              |                              |
|--------------|--------------|------------------------------|
| Individuals  | \$50,851,963 | (students and their success) |
| Environments | \$68,293,233 | (capital projects)           |
| Innovations  | \$48,597,329 | (programmatic investments)   |
  
- Types of gifts:

|                |              |
|----------------|--------------|
| Gifts of cash  | \$38,977,014 |
| 5-year pledges | \$40,087,163 |
| Planned gifts  | \$38,561,391 |
| Gifts in kind  | \$50,116,957 |

**Campaign Impact to Date:**

- Total donors to *Rise. Shine.* 31,310
- First-time donors to the campaign 17,659
- Total alumni donors is 13,051 with 5,362 being first-time contributors
- \$10k+ donors – 1,097
- \$1+ million donors—52
- 360 new scholarships funded, 6 new professorships, 3 lectureships, and gifts in support of more than 20 new buildings or modernization projects at Dayton and Lake Campus.

**Campaign Milestones:**

- First time to take Wright State’s message national. We held launch events in 8 key cities including Houston, Los Angeles, New York City, Tampa/St. Pete, Washington D.C., Cincinnati, Cleveland, Columbus
- We raised \$26 million outside the State of Ohio
- The campaign brought in gifts from all 50 states, plus Washington D.C., and 13 countries outside the U.S.