

**WRIGHT STATE UNIVERSITY
BOARD OF TRUSTEES**

**Advancement Committee Report
April 2018**

1. Alumni Relations Report
2. Wright State Foundation Financial Report
3. Development Report
4. *Discover Your Story*: Archives Campaign Report

**Advancement Committee Report
Alumni Relations Report
April 2018**

Updates:

Annual Report

Printed copies of the 2017 annual report should be distributed to all University Trustees. Some of the highlights include more than 150 events with over 9,000 attendees. Our first ever Wright Day to Give raised almost \$50,000 in 50 hours from over 500 donors in honor of Wright State's 50th.

Alumni Networks and Societies

- The 3rd Alumni Leaders Conference will be held during Homecoming. Leaders from our 19 alumni societies and networks will be invited back to campus for a one day conference and Homecoming events.

Wright State Day at the Dragons, May 12

- The Alumni Association will offer a family friendly pre-game event on the plaza that will include a "meet the mascots" photo booth, DJ, inflatable games, carnival games, and opportunities to meet Wright State athletes. 150 game tickets will be available for purchase and a Wright State University shirt will be offered to those who register online.
Saturday, May 12
Pre-game plaza event starts at 5:30 p.m.
Dragons vs. Peoria starts at 7:00 p.m.

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

March 26 – Social Work Alumni Fifth Street Brew Pub Gives Back
April 6 – Amigos Latinos Gala
April 13 – MUN Alumni Welcome back students from NYC
April 19 – CONH Alumni Wine Tasting
April 21-22 – Wine Trail Tour
April 25 – MPA Alumni celebrate student Capstone
May 9 – Nurses' Night Out
June 2 – Cedar Point Day
July 16 – Legacy Scholarship Golf Outing
July 29 – Kings Island Day
August 10-12 – Theatre and Dance Reunion
August 4-5 – Alumni College
October 5-6 – Homecoming Weekend
November (TBD) – Alumni Service Day
December 1-2 – Chicago Holiday Bus Trip

**Advancement Committee Report
Wright State University Foundation Report
April 2018**

As was reported in the financial press, February was the month when volatility returned to the markets. There was much talk about how the market had given back all its gains since the beginning of the year, but that is speaking of the calendar year. In terms of the fiscal year, the Foundation is still in a positive return situation. The investment report reflects that the Foundation's endowment return for the fiscal year is still a positive 7.02%, despite the significant losses experienced in February. Although that return has underperformed its bench mark for the year (by 28 basis points, thus far), it is still a solid return. The same holds true for the non-endowed portfolio, which had returned a positive 5.97% for the first eight months of the year (versus a benchmark of 6.05%). Although the Foundation's portfolios' market values fell by a little more than \$4.0 million in February (including a \$1 million liquidation), the February 28th total value was still \$4.1 million higher than the beginning of the fiscal year. Asset allocations at the end of February were in line with our investment policy, with actual allocations as follows: 43% equities, 27% fixed income, 13% multi-asset, and 17% alternatives.

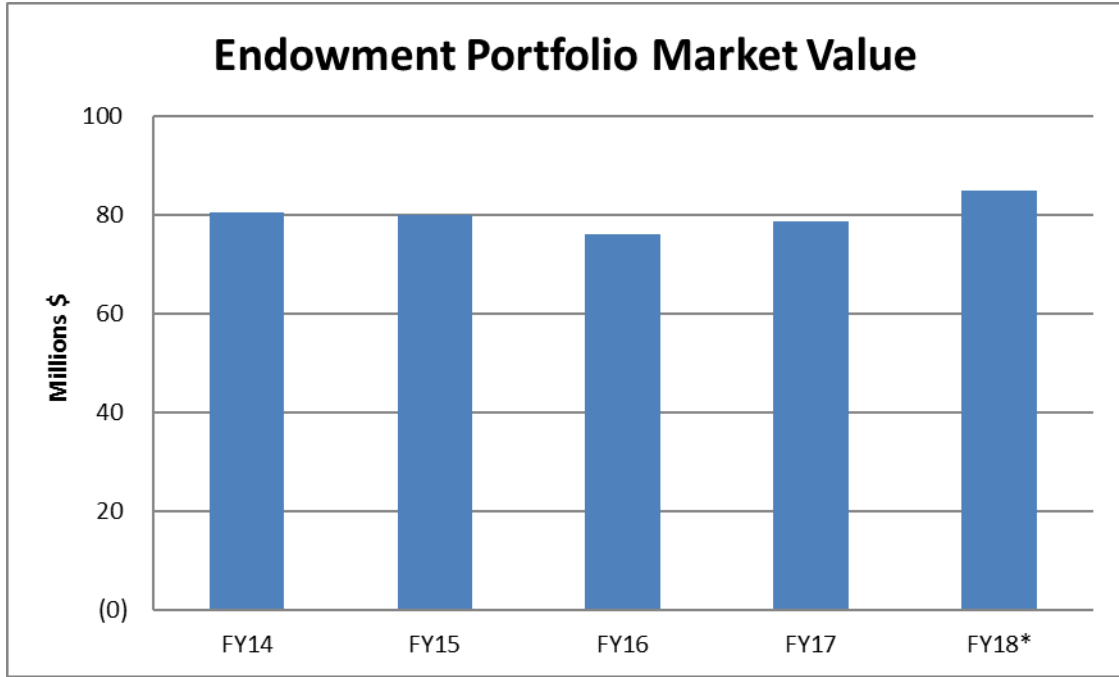
Since the beginning of the year, operations have added \$1.2 million to our unrestricted net assets, a nearly 16% increase. Our gross reserve position ended February at \$8.7 million. That was 32% higher than the same period the previous year.

The Foundation's current endowment portfolio composition, including target allocations, actual allocations, and market values, as of February 28, 2018, is presented below:

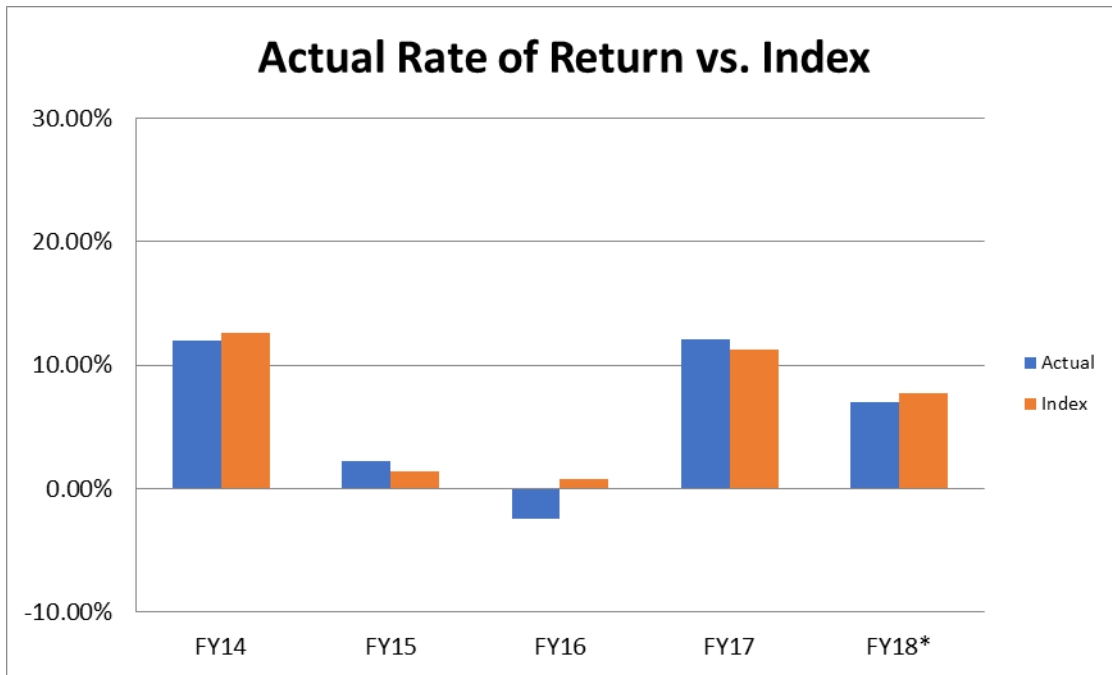
Endowment Portfolio Composition

Asset Class	Target Allocation	Actual Allocation	Market Value February 28, 2018
Equity	42%	44%	\$37,544,346
Fixed income	24%	24%	20,077,434
Multi-asset	14%	13%	11,189,034
Hedge funds	8%	8%	6,665,418
Private equity	8%	7%	5,651,343
Energy Debt	4%	4%	3,866,061
Cash & equivalents	0%	0%	0
Totals	100%	100%	\$84,993,636

Endowment Value



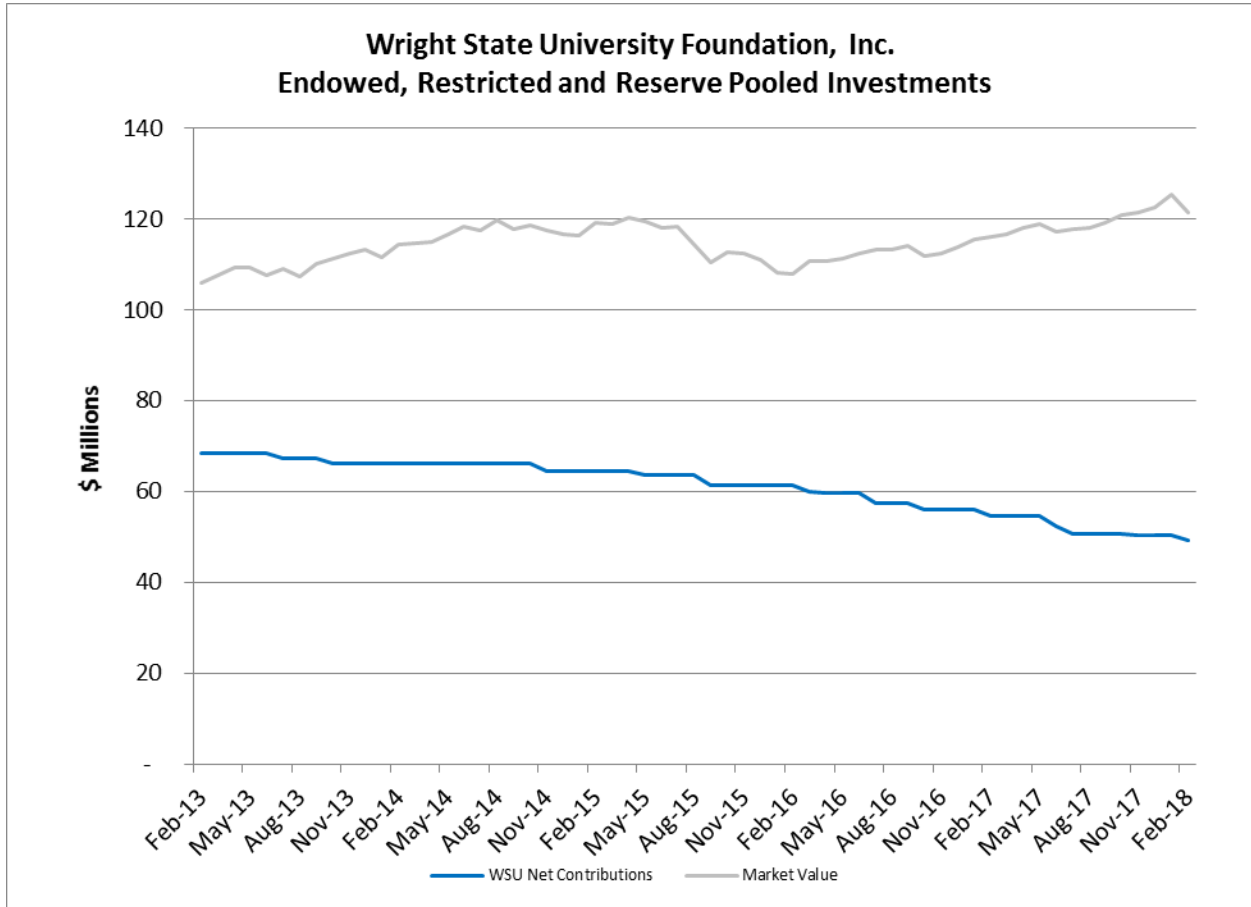
Endowment Historical Rates of Return



*Through February 28, 2018

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, 2018

(including totals from prior fiscal year)

BY SOURCE

SOURCE	CASH ¹	PLEDGES ²	IRREVOCABLE DEFERRED GIFTS ³	GIFTS OF PROPERTY ⁴	REVOCABLE DEFERRED GIFTS ⁵	CURRENT FYTD	PRIOR FYTD
						TOTALS	TOTALS
Alumni	\$540,691	\$285,564	\$0	\$18,204	\$13,591	\$858,050	\$1,651,645
Corporations	701,867	0	0	77,170	0	779,037	1,590,381
Foundations and Organizations	564,528	0	0	18,894	0	583,422	775,816
Friends	806,701	51,738	0	8,136	0	866,575	513,080
CURRENT FYTD TOTALS	\$2,613,787	\$337,302	\$0	\$122,404	\$13,591	\$3,087,084	
PRIOR FYTD TOTALS	\$2,529,049	\$194,460	\$10,000	\$847,413	\$950,000		\$4,530,922
% CHANGE FROM PRIOR FISCAL YEAR	3.4%	73.5%	-100.0%	-85.6%	-98.6%	-31.9%	

BY UNIT

UNIT	CASH ¹	PLEDGES ²	IRREVOCABLE DEFERRED GIFTS ³	GIFTS OF PROPERTY ⁴	REVOCABLE DEFERRED GIFTS ⁵	CURRENT FYTD	PRIOR FYTD
						TOTALS	TOTALS
Boonshoft School of Medicine	\$502,710	\$28,675	\$0	\$0	\$0	\$531,385	\$901,404
College of Education & Human Services	25,461	2,600	0	0	0	28,061	27,809
College of Engineering & Computer Science	173,612	415	0	11,000	0	185,027	197,659
College of Liberal Arts	419,350	11,265	0	84,332	0	514,947	301,549
College of Nursing & Health	83,775	1,555	0	0	13,591	98,921	102,006
College of Science & Math	81,157	27,775	0	21,878	0	130,810	415,467
Curriculum & Instruction	37,644	420	0	150	0	38,214	76,382
Enrollment Management	35,928	200,275	0	0	0	236,203	33,910
Intercollegiate Athletics	427,427	32,575	0	0	0	460,002	358,615
Lake Campus	1,250	0	0	0	0	1,250	65,455
Other	266,832	22,095	0	400	0	289,327	712,210
Raj Soin College of Business	141,106	6,600	0	0	0	147,706	644,212
School of Professional Psychology	27,750	1,195	0	65	0	29,010	113,860
Student Affairs	142,011	290	0	4,579	0	146,880	273,034
University College	150,200	88	0	0	0	150,288	250,000
University Libraries	97,574	1,479	0	0	0	99,053	57,350
CURRENT FYTD TOTALS	\$2,613,787	\$337,302	\$0	\$122,404	\$13,591	\$3,087,084	
PRIOR FYTD TOTALS	\$2,529,049	\$194,460	\$10,000	\$847,413	\$950,000		\$4,530,922
% CHANGE FROM PRIOR FISCAL YEAR	3.4%	73.5%	-100.0%	-85.6%	-98.6%	-31.9%	

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, 2018 and 2017**

MONTH-TO-DATE

GIFT SOURCE	FEB 2018		FEB 2017		PCT. CHANGE	
	DONORS	DOLLARS	DONORS	DOLLARS	DONORS	DOLLARS
Alumni	244	\$68,503	287	\$35,142	-15%	95%
Corporations	33	85,030	28	95,464	18%	-11%
Foundations and Organizations	16	94,292	11	235,006	45%	-60%
Friends	261	175,025	385	40,545	-32%	332%
SUBTOTAL CASH RECEIPTS	554	\$422,850	711	\$406,157	-22%	4%
Gifts-in-kind	59	41,939	12	2,442	392%	1617%
TOTAL ALL RECEIPTS	613	\$464,789	723	\$408,599	-15%	14%

FISCAL-YEAR-TO-DATE

GIFT SOURCE	FY2018		FY2017		PCT. CHANGE	
	DONORS	DOLLARS	DONORS	DOLLARS	DONORS	DOLLARS
Alumni	1,594	\$718,482	1,431	\$786,248	11%	-9%
Corporations	196	1,588,974	208	1,335,502	-6%	19%
Foundations and Organizations	69	1,422,765	61	1,650,310	13%	-14%
Friends	1,222	1,081,064	1,333	659,330	-8%	64%
SUBTOTAL CASH RECEIPTS	3,081	\$4,811,285	3,033	\$4,431,390	2%	9%
Gifts-in-kind	94	122,404	40	847,413	135%	-86%
TOTAL ALL RECEIPTS	3,175	\$4,933,689	3,073	\$5,278,803	3%	-7%

**Advancement Committee Report
Development Report
April 2018**

Planned Giving Update

FY2018 Planned Gift Report:

- One planned gift commitment with a stated gift value of \$13,591 has been recorded thus far in FY18.
- Three planned gifts and an initial distribution of one other realized estate have been received during this fiscal year. The combined total of these estate distributions total \$364,679.
- We also anticipate distributions of at least two other estates at some point in time as these estates are liquidated, along with ongoing distributions from the partially realized estate mentioned above in its initial distribution. The total of these three estates is anticipated to be over \$4,200,000.
- There are currently nine additional planned gifts in discussion with an estimated projected value of \$2,682,000. There are also 25 potential planned gifts in the early stage of discussion.
- We continue to market the planned giving program through a variety of means including face-to-face discussions, a monthly e-newsletter that goes out each month to over 20,000 individuals, bi-annual promotional mailing, and an e-blast. We are now gearing up to test Facebook marketing to a targeted segment of Wright State constituents. Additionally, we met with the Board of the Wright State Retiree Association to coordinate efforts with them on our Campus Scholarship and Innovation Campaign while also promoting planned gifts with this key audience.
- The Katharine Wright Legacy Society has had events to honor and thank Society members. Membership is made up of those who have remembered Wright State with a deferred gift.

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.

Fall Direct Mail Appeal

The annual fall direct mail appeal dropped in the mail in early November. It was customized with student features in each academic area. The primary audience included alumni, however, without a traditional Phonathon in FY18, this appeal was also sent to friends who are past donors.

- New strategy in FY18
 - Expanding our appeal to include a historical timeline featuring some of Wright State University biggest milestones in our 50 anniversary year.
 - Expanding our audience in recognition of our 50th anniversary

Fall Appeal Results

90 day results FY18	\$86,876	474 gifts
90 day results FY17	\$95,165	489 gifts
90 day results FY16	\$83,530	386 gifts

2018 CSIC – Campus Scholarship and Innovation Campaign

The annual faculty, staff, retiree campaign launched on Monday, March 12th. Results through week 1, nearly \$200,000 and 29% participation, up from 22% the first week last year. The 7-week campaign will conclude on April 27.

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

Spring Phonathon

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

Campaigns:

- BSOM, January
- Wed to Wed Alumni, February
- Donors who have historically given through Phonathon in the last three years and all donors from last fiscal year who have not renewed in FY18
- Selected mini solicitation campaigns by request

Crowdfunding Pilot Program

Five approved pilot projects ranging from athletics, to the arts, to academic based projects, were approved and will launch a pilot campaign later this spring.

Advancement Committee Report
Discover Your Story: Archives Campaign Report
April 2018

Campaign Plans:

- Tours of the current Archives space as well as the new space located at 2455 Presidential Drive (former Wright-Patt Credit Union Corporate Headquarters) have been occurring regularly.
- In March, hosted national author and WSU alumna, Ann Weisgarber, for keynote address and local speaking engagements on the importance of archival materials, our legacy, and her experiences as a historical fiction writer.
- Dawne Dewey, Head, Special Collections and Archives, is making presentations to area service clubs and community organizations to talk about the project.

Campaign Marketing:

- Advancement Communications has been conducting interviews with Archives donors to share their stories about why they made their gifts to this project.
- A one-year plan with events and media coverage to draw attention to the project is being drafted. Distinguished Honorary Chair, Amanda Wright Lane, is contacting notable personalities related to the Aviation Industry and Heritage to visit Wright State to endorse the Archives Center Campaign.

Fundraising Strategies:

- Preparing grant applications to regional, Ohio, and national Foundations for funding consideration. Scheduled to make a presentation to a local grant committee with hope for recommendation to national foundation.
- Scheduling private meetings with individual donors to discuss their interests and intent in making gifts to the Archives.

Gifts Committed to Date:

- To date, we've raised nearly \$600,000 toward the goal of \$6.5 million in CASH.
- There are 3 named spaces included in the giving totals
 - √ Amanda Wright Lane Lobby
 - √ Dr. Lewis Shupe Oral History Lab
 - √ Dr. Gary Barlow Conference Room

Project Description:

- The Archives Center Modernization project provides for the renovation of 30,000 SF of space and the relocation of the current Special Collections and Archives. The new space will provide appropriate environmental conditions to lengthen the life of these priceless collections. Controls will include protections from temperature, humidity, light, fire, and air quality. They are moving from their current space in two campus locations of 12,000 square feet to a dedicated space of 30,000 square feet.