

**WRIGHT STATE UNIVERSITY
BOARD OF TRUSTEES**

**Advancement Committee Report
January 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
January 2018**

Updates:

Alumni Networks and Societies

- The 3rd Alumni Leaders Conference will be held in the fall. Leaders from our 19 alumni societies and networks will be invited back to campus for a one day conference.
- 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 taken the initial steps to identify and appoint AA board members who will meet with university leadership of colleges and various departments. This work will strengthen the relationship with university partners and open dialogue for new business for the Alumni Association.

Life After Wright State

- A Series of programs are currently being planned for this year's Life after Wright State Series. Thanks to a grant through Wright-Patt Credit Union, we will be bringing Peter Bielagus, a nationally known financial educator to campus. Peter travels the country talking to college students about how to secure their own financial future. Peter will visit campus on Wednesday, March 21, 2018.

Other Life After Wright State events include:

- Student/Alumni Speed Networking
- Annual Senior Sendoff Picnic
- Finals Week Happy Hour

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

January 11 - Raider pre-game gathering at NKU
January 20 – African American Alumni Society Annual Meeting
January 26 – Annual Alumni Beer Tasting
February 1 - Raider pre-game gathering at CSU
February 8 – Alumni Night at Coopers Hawk, Columbus
February 16 – Alumni Night at the Game
February 24 – Rowdy Gras
March 8 – CONH Alumni Wine Tasting
March 26 – Social Work Alumni Fifth Street Brew Pub Gives Back
April 6 – Amigos Latinos Gala
April 21-22 – Wine Trail Tour
June 2 – Cedar Point Day
July 29 – Wright State Alumni Kings Island Day
August (TBD) – Theatre and Dance Reunion

August (TBD) – Alumni College
October 5-6 – Homecoming Weekend
November (TBD) – Alumni Service Day

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

The Foundation's endowment portfolio ended the month of November with a market value of \$83.9 million, up \$5.2 million since the beginning of the year (including a capital infusion of \$2.0 million in November). The portfolio has returned a solid 5.84% for the year, but has underperformed its benchmark by 32 basis points. The one-year return for the endowment portfolio was 14.58% on November 30th. Investment asset allocations were in line with ranges specified in our investment policy and allocated 44% to equity securities, 24% to fixed income, 13% to mixed assets and 19% to alternative assets. Asset allocation, market value, and rates of return specific to the endowment portfolio are provided in the following exhibits.

Thus far in FY18, our equity investments have significantly outperformed fixed income, +9.33% to +1.63%. Within the equity space, world equity (ex-US) has outperformed domestic equity, +10.80% to +9.12%. In the international arena, emerging markets performance has been especially strong, returning +13.14% through the first five months of FY18. Returns on our US large cap investments have outpaced small cap returns, +10.09% versus +8.31%. All our fixed income investments have provided positive returns, with emerging market debt providing the highest five-month return at +3.77%. Our multi-asset investments (which combine equity, fixed income and other investments) have also provided solid performance with a combined return of +6.74% for the period. Finally, our alternative investments have also performed modestly well during the year adding a combined 3.08% return to the portfolio.

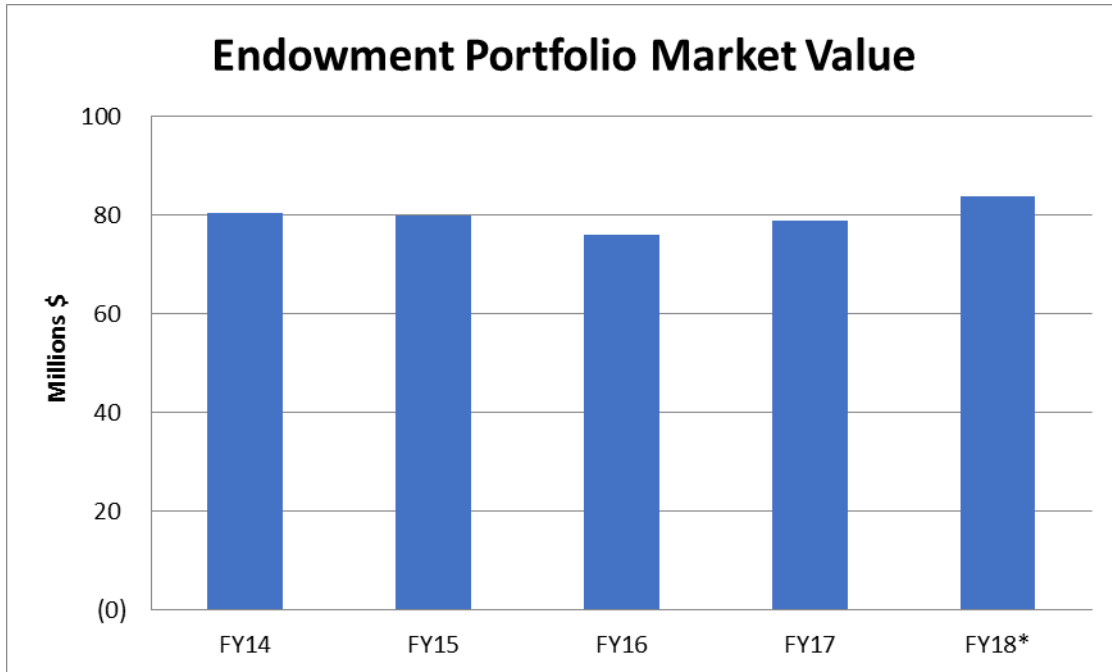
Since the beginning of the year, operations have added \$1.1 million to our unrestricted net assets, a nearly 15% increase. Our gross reserve position ended November at \$8.7 million. That was 58% higher than the same period the previous year.

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

Endowment Portfolio Composition

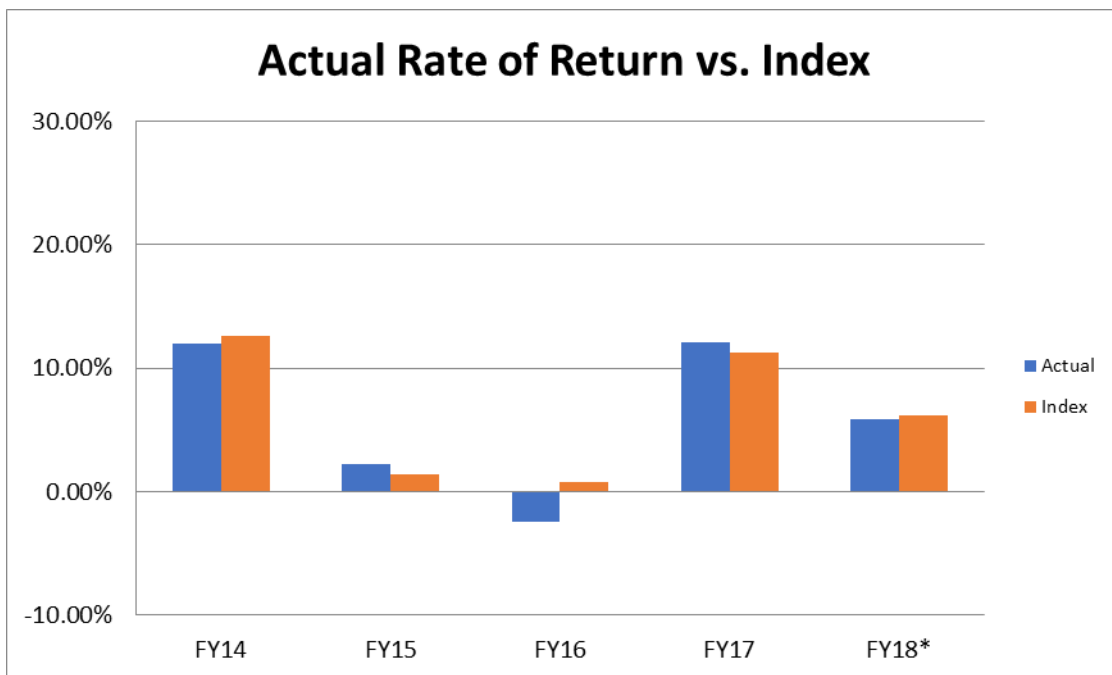
Asset Class	Target Allocation	Actual Allocation	Market Value November 30, 2017
Equity	42%	44%	\$36,860,539
Fixed income	24%	24%	20,019,210
Multi-asset	14%	13%	11,083,943
Hedge funds	8%	8%	6,550,332
Private equity	8%	7%	5,699,526
Energy Debt	4%	4%	3,713,441
Cash & equivalents	0%	0%	0
Totals	100%	100%	\$83,926,991

Endowment Value



*Through November 30, 2017

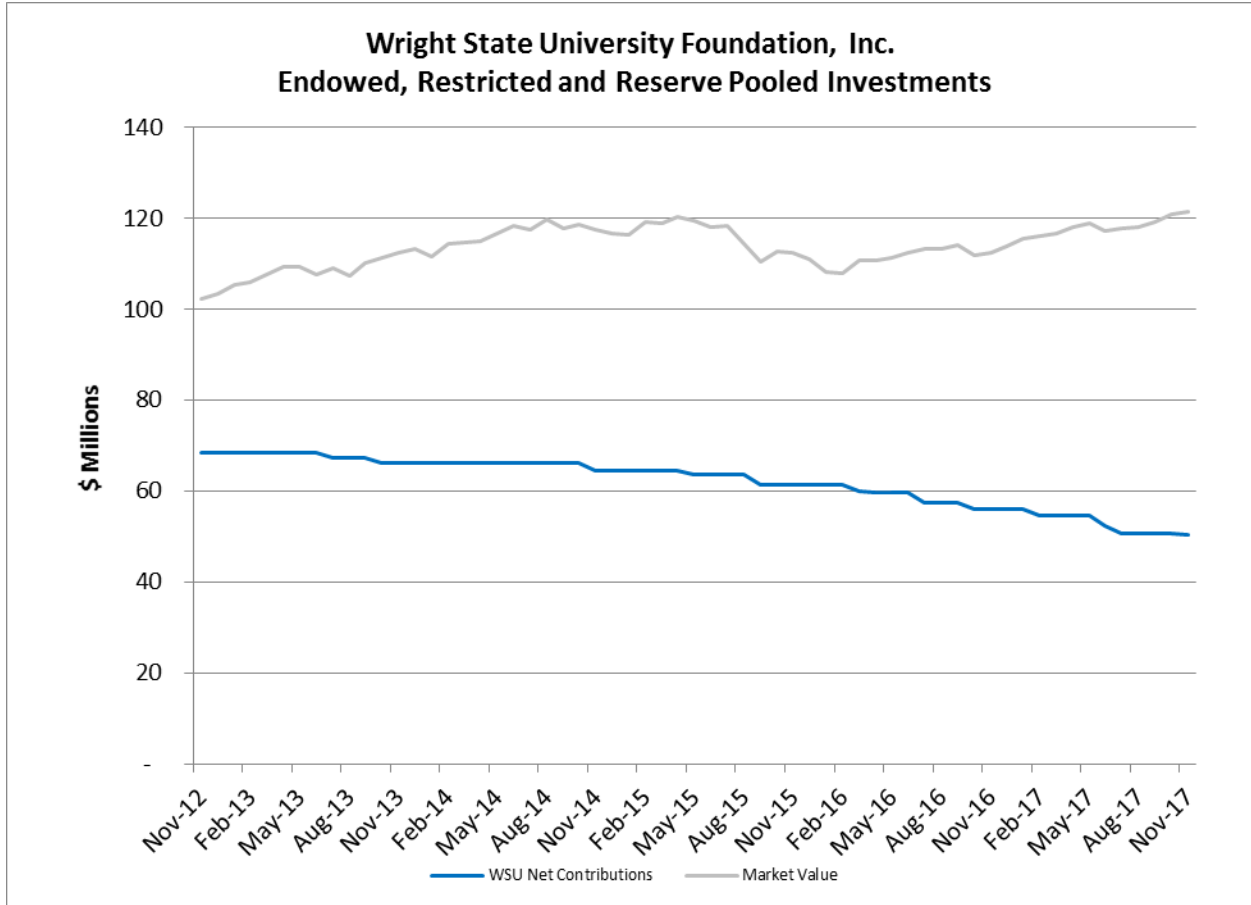
Endowment Historical Rates of Return



*Through November 30, 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 November 30, 2017**

(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	\$245,129	\$40,744	\$0	\$474	\$13,591	\$299,938	\$1,317,439
Corporations	498,082	0	0	24,974	0	523,056	518,804
Foundations and Organizations	184,460	0	0	70	0	184,530	362,922
Friends	288,762	49,313	0	3,599	0	341,674	271,270
CURRENT FYTD TOTALS	\$1,216,433	\$90,057	\$0	\$29,117	\$13,591	\$1,349,198	
PRIOR FYTD TOTALS	\$1,249,969	\$113,420	\$0	\$157,046	\$950,000		\$2,470,435
% CHANGE FROM PRIOR FISCAL YEAR	-2.7%	-20.6%	N/A	-81.5%	-98.6%	-45.4%	

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	\$208,905	\$15,900	\$0	\$0	\$0	\$224,805	\$109,276
College of Education & Human Services	11,819	2,075	0	0	0	13,894	8,449
College of Engineering & Computer Science	81,699	90	0	0	0	81,789	136,559
College of Liberal Arts	112,092	16,215	0	3,759	0	132,066	144,637
College of Nursing & Health	61,330	330	0	0	13,591	75,251	21,676
College of Science & Math	65,193	27,600	0	21,354	0	114,147	345,196
Curriculum & Instruction	32,522	375	0	150	0	33,047	60,086
Enrollment Management	11,535	275	0	0	0	11,810	8,055
Intercollegiate Athletics	245,725	12,500	0	0	0	258,225	151,227
Lake Campus	350	0	0	0	0	350	40,075
Other	137,941	11,345	0	133	0	149,419	513,394
Raj Soin College of Business	66,749	300	0	0	0	67,049	558,237
School of Professional Psychology	15,590	1,195	0	0	0	16,785	110,240
Student Affairs	108,173	290	0	3,721	0	112,184	235,548
University College	0	88	0	0	0	88	0
University Libraries	56,810	1,479	0	0	0	58,289	27,780
CURRENT FYTD TOTALS	\$1,216,433	\$90,057	\$0	\$29,117	\$13,591	\$1,349,198	
PRIOR FYTD TOTALS	\$1,249,969	\$113,420	\$0	\$157,046	\$950,000		\$2,470,435
% CHANGE FROM PRIOR FISCAL YEAR	-2.7%	-20.6%	N/A	-81.5%	-98.6%	-45.4%	

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.

GIFT SOURCE	NOV 2017		NOV 2016		PCT. CHANGE	
	DONORS	DOLLARS	DONORS	DOLLARS	DONORS	DOLLARS
Alumni	389	\$72,275	481	\$45,724	-19%	58%
Corporations	29	42,474	31	137,489	-6%	-69%
Foundations and Organizations	12	740,526	6	517,250	100%	43%
Friends	391	68,384	450	62,847	-13%	9%
SUBTOTAL CASH RECEIPTS	821	\$923,659	968	\$763,310	-15%	21%
Gifts-in-kind	5	523	1	20,000	400%	-97%
TOTAL ALL RECEIPTS	826	\$924,182	969	\$783,310	-15%	18%

FISCAL-YEAR-TO-DATE

GIFT SOURCE	FY2018		FY2017		PCT. CHANGE	
	DONORS	DOLLARS	DONORS	DOLLARS	DONORS	DOLLARS
Alumni	1,143	\$324,336	945	\$376,541	21%	-14%
Corporations	127	872,728	111	625,416	14%	40%
Foundations and Organizations	42	916,697	32	374,872	31%	145%
Friends	902	360,549	871	244,690	4%	47%
SUBTOTAL CASH RECEIPTS	2,214	\$2,474,310	1,959	\$1,621,519	13%	53%
Gifts-in-kind	15	29,117	11	137,046	36%	-79%
TOTAL ALL RECEIPTS	2,229	\$2,503,427	1,970	\$1,758,565	13%	42%

**Advancement Committee Report
Development Report
January 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.

- One planned gift has been realized in this fiscal year. We received the initial distribution (\$36,000) from the planned gift donor. Another distribution from her estate will be coming once her financial affairs are closed out.
 - We also anticipate receiving distributions from 5 other realized estates. Those 5 estates, plus the previously mentioned expected estate distribution have an anticipated combined value of \$4,400,000.
 - Of these, two are from WSU Retirees.

- There are currently eight additional planned gifts in discussion with an estimated projected value of \$2,657,000. There are also another 22 potential planned gifts in early stage discussion

We have seen an increase in the number of people making charitable gifts to Wright State by rolling over their Required Minimum Distribution (RMD) from their IRA, which they can do tax free once they reach age 70 ½.

The previous Director of Planned Giving, Regis Lekan, retired from the University this summer but was retained by the Foundation until the end of the calendar year 2017 to assist with a seamless transition to his successor. Mr. Bill Bigham assumed his duties as Director of Planned Giving on November 1 and worked very closely with Regis Lekan in the final weeks of 2017 to ensure the ongoing work of planned giving continued without interruption.

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's biggest milestones in our 50 anniversary year.
 - Expanding our audience in recognition of our 50th anniversary

Fall Appeal Results

30 day results FY18	\$35,065	295 gifts
30 day results FY17	\$36,560	248 gifts
30 day results FY16	\$24,147	220 gifts

#GivingTuesday – Tuesday, November 28th

We participated in #GivingTuesday in a smaller capacity as of result of our Wright Day to Give Campaign (10/1/2017), promoting the new Archives Campaign. However, BSOM participated in a much larger capacity with a digital campaign targeted at alumni giving in addition to an on campus event for BSOM medical students over the lunch time hours on the 28th.

#GivingTuesday Results

2017 (CY)	\$11,465, 86 donors
2016 (CY)	\$10,717, 129 donors
2015 (CY)	\$7,800, 75 donors

2017 CSIC – Campus Scholarship and Innovation Campaign

2017 CSIC results will be calculated through December 31, 2017.

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

Campaign Plans:

- Multiple speaking engagements at area service clubs, community groups, and civic organizations are in progress.
- 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.

Campaign Marketing:

- The campaign case for support document entitled “Discover Your Story” has been produced and is in use during tours of the current and new facilities.
- Selected direct-mail campaigns have been undertaken to provide the case document to prospective campaign donors.
- A one-year plan with high visibility marketing ideas has been prepared for calendar year 2018. This is to keep the Archives project highly visible.

Fundraising Strategies:

- The Archives Center Project was submitted for consideration through the PDAC process. It received a high score and was ranked second for rural areas in the “Quality of Life” category.
- On December 21, 2017, President Schrader, Bob Hickey, Dawne Dewey, Mary Jean Henry, and Rebecca Cole hosted Representative Rick Perales for a tour of both sites. He will communicate his findings to his House colleagues who are working on the budget.

Gifts Committed to Date:

- To date, we’ve raised nearly \$500,000 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. The provision of adequate space to house over 15,000 linear feet of collections, including 20,000 volumes with more than 16,000 books, is a major objective of the project. They are moving from their current space in two campus locations of 12,000 SF to a dedicated space of 30,000 square feet.

