

**WRIGHT STATE UNIVERSITY  
BOARD OF TRUSTEES**

**Advancement Committee Report  
March 2019**

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

### March 2019

#### Updates:

##### **FESTIVAL OF FLIGHT**

New Festival of Flight to celebrate aviation in the Miami Valley.

The all-day festival will take place behind the Wright State University Nutter Center on Oct. 5, 2019. The festival will be sponsored by the City of Fairborn, Wright State University, and the Wright State Alumni Association, in partnership with the Miami Valley Restaurant Association, the National Aviation Heritage Alliance, the National Aviation Hall of Fame, and the National Museum of the U.S. Air Force.

The festival will feature aviation-related educational experiences, flight-themed food and drinks, entertainment (including live bands), a dedicated area with fun activities for children, and a haunted trail. Sports fans can watch games by the Wounded Warrior Amputee Softball Team and the Wright State volleyball, men's soccer, and club football teams. Wright State students will participate in a parade of golf carts that they will decorate with flight themes.

The festival will appeal to families from around the Miami Valley and flight enthusiasts across the country. The event is expected to attract an estimated 10,000 to 12,000 people.

More details, including a schedule of performances, games, and activities, will be available at [festivalofflight.org](http://festivalofflight.org) later this year.

##### **WRIGHT STATE MAGAZINE**

We are in the final planning stages for the spring 2019 issue of *Wright State Magazine*.

After meeting with the Office of Marketing earlier last fall, we were informed that the last iteration of the magazine they produce is now dead and that whatever we produce will become the official alumni magazine of WSU. Therefore, we've chosen to remove the "flight" name and just call it the "Wright State Magazine." Our next magazine cover story will be "2019: The Year of the Woman" and we will be choosing 5 different profiles of female leaders/interesting profiles of women at WSU:

**Leadership Duo:** Dr. Schrader/Dr. Edwards

**Alumna:** Joyce Beatty, Congresswoman

**Donor:** Zoe Dell Nutter (former dancer, aviator, and philanthropist @ age 104)

**Faculty:** Dr. Caroline Cao

**Student:** Stevie Lamblin (DCDC dancer and WSU graduate student)

We will also be featuring stories on:

- The history of the African American Alumni Society Scholarship
- A grant from the Reeve Foundation which is providing robotic machines in the dining hall to help students with disabilities eat
- Profile on Liz Conzo-Kerschner, an alumna who is an executive at John Deere

It will hit homes at the beginning of April. Our next issue will hit homes in August, before Homecoming.

## **WRIGHT STATE ALUMNI ASSOCIATION STRATEGIC PLANNING**

The WSU Alumni Association is in the middle of the process to develop and implement its strategic plan for the next 3 years. The WSUAA has retained a highly recommended strategic planning consultant, Harry Kangis of One Page Solutions in Cincinnati, to facilitate development of a new strategic plan for the Association.

The strategic planning committee assigned by the WSUAA Board has already met once on February 23 and has identified key strategies to be implemented. The Strategic Planning Committee will meet again on March 30 to further develop the plan, finalize details, and indicate deadlines. The plan will be reviewed at the May 4, 2019 Board meeting and voted on at the August 3, 2019 Board meeting.

## **Wright State Norwegian Cruise set for 2020!**

The Wright State Alumni Association has partnered with Norwegian Cruise Line to provide alumni and friends of Wright State a one of a kind travel experience. In May of 2020, we will embark on a 7-day cruise from New York City to Bermuda aboard NCL's newest ship (not sailing yet) ENCORE. More information about this trip can be found at [www.wrightstatealumni.com](http://www.wrightstatealumni.com)

## **EVENT RECAPS**

On March 2<sup>nd</sup>, we hosted one of our most highly anticipated events- Rowdy Gras. Rowdy Gras is a long-standing annual event sponsored by the Alumni Association. Designed as a New Orleans themed casino night, Rowdy Gras provides attendees with an evening of dancing, casino games, and NOLA themed food and drinks. This year's Rowdy Gras was named as one of Dayton.com's top 10 Mardi Gras events in Dayton. We had 225 attendees this year.

The past few months, our student advancement organization, the '67 Society, has been busy. In February, they hosted their annual Raider Round Up event prior to the WSU vs. NKU men's basketball game. This pre-game spirit rally had over 700 students in attendance and included a most spirited contest, face painting, sign making, inflatables and food.

During the Motor City Madness Horizon League Tournament, we held pregame tailgates prior to the men's semifinals and the '67 Society hosted 60 students who traveled to Detroit to cheer on both our men's and women's basketball teams. The '67 Society hosted an event between the women's and men's final games on Tuesday afternoon at Punch Bowl Social, a bar/restaurant that has bowling, outdoor games, and other activities.

## **UPCOMING EVENTS:**

Saturday, March 30: Cleveland International Film Festival: American Factory

Wednesday, April 10: Veteran and Military Alumni Society Graduation Celebration

Saturday, April 13: ARTSGALA

Saturday, May 18: Wine Trail Tour (overnight)

Tuesday, May 28: Veteran and Military Alumni Society Guest Bartending Night at the Wandering Griffin

Saturday, June 8: Wright State Day at the Dayton Dragons

Saturday, June 29: Cincinnati Reds Trip

Sunday, July 21: Wright State Day at Kings Island

Friday, August 2: 43<sup>rd</sup> Annual Alumni Association Legacy Scholarship Golf Outing  
Saturday, August 3: Alumni College  
Saturday, September 14: 9<sup>th</sup> Annual Bourbon Tour (overnight)  
Monday, September 30 – Saturday, October 5: Homecoming  
Friday, October 4: Alumni Achievement Awards  
Saturday, October 5: Festival of Flight  
Friday, December 13-15: Chicago Holiday Tour (overnight)  
May, 2020: Wright State Norwegian Cruise from NYC to Bermuda

**Advancement Committee Report**  
**Wright State University Foundation Report**  
**March 2019**

After suffering significant losses in the fourth quarter of 2018, the financial markets have reversed course gaining back most of the losses experienced in the last quarter of 2018. As indicated below, our endowment portfolio finished the month of February 2019 with a market value of just under \$86.0 million, an increase of \$1.2 million or 1.4% over its value on July 1, 2018. The portfolio's total return regained its footing in February bringing the fiscal year-to-date return back into positive territory, although just slightly. Through February 28, 2019, the endowment portfolio has returned a positive 0.39%; that return lagged its weighted benchmark by 150 basis points. The total return has been driven more by fixed income investments (+2.94% for the year) than by equities (+1.07%). Domestic equities have outpaced international (ex-US) securities, which have lost 3.04% for the year. In the domestic stock space, large cap (+3.72%) has outperformed small cap, with the latter contributing to a drag on returns (-3.43%). Our managed volatility investment has added the greatest value to equity returns for the year, returning a positive 6.95%. Fixed income returns have been positive across the board with emerging markets debt providing the strongest performance at a positive 4.77%. Alternative investments, excluding private equity have not fared as well. Our hedge fund-of-funds has lost 3.41% for the year while our energy debt investment has lost 5.82%. These losses combined for a negative 4.30% drag on total return. At February 28, 2019, the portfolio's one-, three-, five-, and ten-year net returns were -0.07%, 8.49%, 4.34%, and 9.67%, respectively. Asset allocations at the end of February were in line with our investment policy, with actual allocations as follows: 42% equities, 27% fixed income, 13% multi-asset, and 18% alternatives.

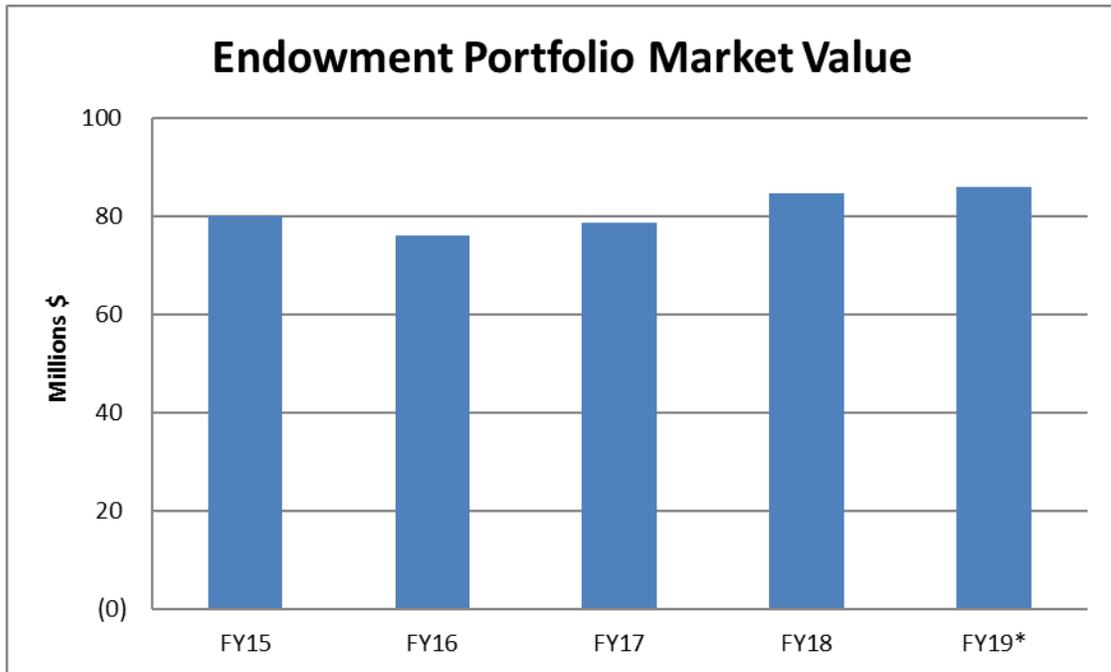
In lock step with the improved market performance, the Foundation's unrestricted net assets or gross reserve, has also seen an uptick during the current quarter. The gross reserved finished the month of February with a value of \$8.5 million, just \$0.2 million or 2.2% below its value at the beginning of the fiscal year. This is a significant improvement over its position at the end of December when fourth quarter losses had reduced the level by 27%.

The Foundation's current endowment portfolio composition, including target allocations, actual allocations, and market values, as of February 28, 2019, is presented below:

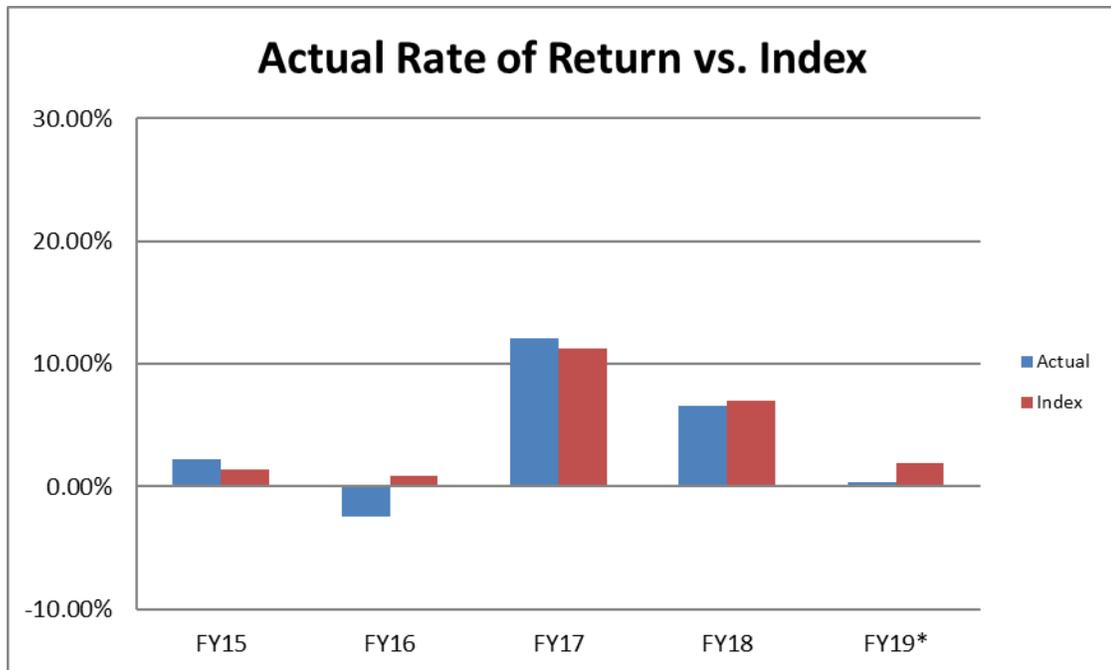
**Endowment Portfolio Composition**

<b><u>Asset Class</u></b>	<b><u>Target Allocation</u></b>	<b><u>Actual Allocation</u></b>	<b><u>Market Value February 28, 2019</u></b>
<b>Equity</b>	<b>42%</b>	<b>44%</b>	<b>\$37,560,994</b>
<b>Fixed income</b>	<b>24%</b>	<b>24%</b>	<b>20,614,886</b>
<b>Multi-asset</b>	<b>14%</b>	<b>13%</b>	<b>11,425,743</b>
<b>Hedge funds</b>	<b>8%</b>	<b>8%</b>	<b>6,499,413</b>
<b>Private equity</b>	<b>8%</b>	<b>7%</b>	<b>6,121,905</b>
<b>Energy Debt</b>	<b>4%</b>	<b>4%</b>	<b>3,749,550</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>\$85,972,491</b>

### Endowment Value

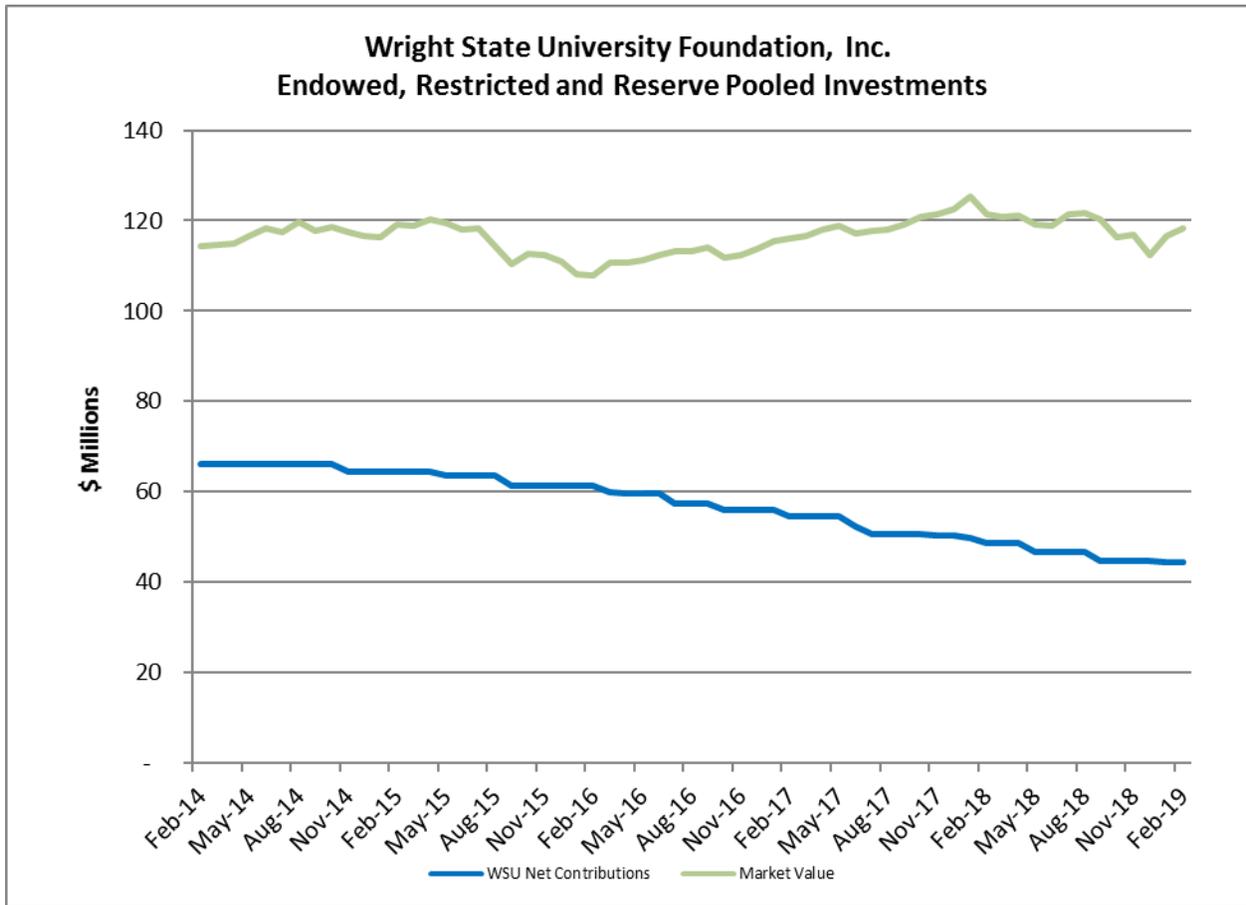


### Endowment Historical Rates of Return



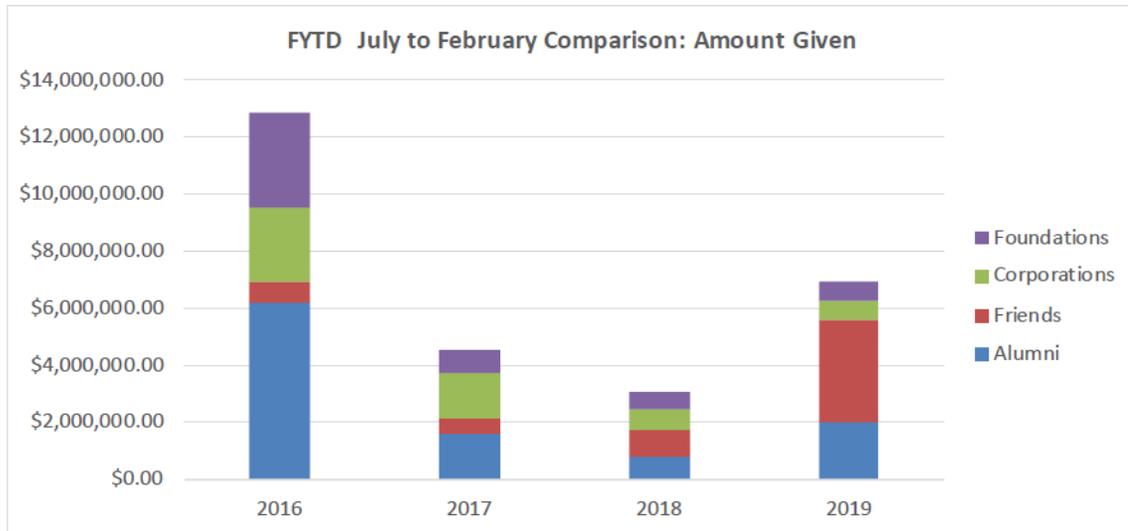
The index is composed of various market indices of like asset classes in the same proportion as the Foundation's approved asset allocation as defined in its Investment Policy Statement (IPS).

**All Portfolios Value vs. Contributions**



**Commitments per Fiscal Year by Source: Dollars FYTD Comparison  
July 1, 2015 - February 28, 2019**

<b>FY July to February</b>	<b>Alumni</b>	<b>Friends</b>	<b>Corporations</b>	<b>Foundations</b>	<b>Grand Total</b>
2016	\$6,216,073.01	\$748,570.28	\$2,585,313.87	\$3,329,556.02	\$12,879,513.18
2017	\$1,643,896.68	\$529,081.25	\$1,590,382.36	\$775,815.88	\$4,539,176.17
2018	\$829,084.16	\$889,856.16	\$778,186.64	\$588,421.61	\$3,085,548.57
2019	\$1,980,399.14	\$3,616,761.03	\$654,629.63	\$661,897.83	\$6,913,687.63



*This report includes all pledges and gifts to Wright State University Foundation, not pledge payments.*

**Commitments per Fiscal Year by Area/Unit  
July 1, 2015 - February 28, 2019**

<b>Area/Program</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
<b>Athletics</b>	\$1,625,373.23	\$466,954.02	\$548,935.74	\$2,838,162.66
<b>Colleges and Schools</b>	\$19,364,466.46	\$6,403,952.95	\$4,850,842.49	\$3,003,101.81
CECS	\$2,688,041.12	\$1,031,049.08	\$1,475,699.33	\$134,741.51
CEHS	\$91,686.41	\$111,219.63	\$66,036.88	\$49,902.74
COLA	\$990,897.46	\$775,600.57	\$920,474.89	\$915,482.15
CONH	\$571,485.30	\$1,554,858.89	\$214,074.03	\$245,898.40
COSM	\$10,920,654.39	\$564,120.26	\$163,770.91	\$82,412.00
LAKE	\$1,327,467.92	\$255,859.92	\$227,020.00	\$8,382.32
RSCB	\$494,847.31	\$810,319.59	\$264,255.20	\$192,583.48
BSOM	\$2,136,516.55	\$1,183,717.01	\$1,483,914.33	\$1,353,689.21
SOPP	\$142,870.00	\$117,208.00	\$35,596.92	\$20,010.00
<b>University Libraries</b>	\$93,412.03	\$67,262.19	\$287,080.63	\$524,889.38
<b>University Wide</b>	\$5,096,013.16	\$1,987,862.48	\$1,484,839.79	\$547,533.78
<b>Grand Total</b>	\$26,179,264.88	\$8,926,031.64	\$7,171,698.65	\$6,913,687.63

**WRIGHT STATE UNIVERSITY FOUNDATION, INC.**

**Report of Total Receipts: Cash and Gifts-in-Kind  
For the Month Ended February 28, 2019 and 2018**

**MONTH-TO-DATE**

GIFT SOURCE	FEB 2019		FEB 2018		PCT. CHANGE	
	DONORS	DOLLARS	DONORS	DOLLARS	DONORS	DOLLARS
Alumni	207	\$31,236	247	\$68,944	-16%	-55%
Corporations	37	303,491	33	85,031	12%	257%
Foundations and Organizations	12	172,861	16	94,292	-25%	83%
Friends	260	46,982	258	174,583	1%	-73%
<b><i>SUBTOTAL CASH RECEIPTS</i></b>	<b>516</b>	<b>\$554,570</b>	<b>554</b>	<b>\$422,850</b>	<b>-7%</b>	<b>31%</b>
Gifts-in-kind	24	20,987	58	41,089	-59%	-49%
<b><i>TOTAL ALL RECEIPTS</i></b>	<b>540</b>	<b>\$575,557</b>	<b>612</b>	<b>\$463,939</b>	<b>-12%</b>	<b>24%</b>

**FISCAL-YEAR-TO-DATE**

GIFT SOURCE	FY2019		FY2018		PCT. CHANGE	
	DONORS	DOLLARS	DONORS	DOLLARS	DONORS	DOLLARS
Alumni	1,496	\$592,874	1,600	\$720,043	-7%	-18%
Corporations	185	1,585,091	196	1,588,975	-6%	0%
Foundations and Organizations	59	1,341,662	69	1,422,765	-14%	-6%
Friends	1,068	633,834	1,216	1,079,502	-12%	-41%
<b><i>SUBTOTAL CASH RECEIPTS</i></b>	<b>2,808</b>	<b>\$4,153,461</b>	<b>3,081</b>	<b>\$4,811,285</b>	<b>-9%</b>	<b>-14%</b>
Gifts-in-kind	41	101,988	94	121,554	-56%	-16%
<b><i>TOTAL ALL RECEIPTS</i></b>	<b>2,849</b>	<b>\$4,255,449</b>	<b>3,175</b>	<b>\$4,932,839</b>	<b>-10%</b>	<b>-14%</b>

**Advancement Committee Report  
Development Report  
March 2019**

**Planned Giving Update**

FY2019 Planned Gift Report:

- Ten planned gift commitments with a stated gift value of \$4,448,000 have been recorded thus far in FY19.
- Five planned gifts distributions from realized estates have been received during this fiscal year. The combined total of these estate distributions total \$116,695. We anticipate additional distributions will be received this fiscal year as some known estate expectancies are in the process of being liquidated and disbursed.
- We also have distributions pending from seven other estates at some point in time as these estates are liquidated. The total of these seven estates is anticipated to be over \$4,000,000.
- There are currently nine additional planned gifts in discussion with an estimated projected value of \$10,500,000. We also have forty potential planned gifts in the early stage of discussion.
- We also have nearly forty individuals that are engaged in varying stages of planned gift discussions.
- The Katherine Wright Legacy Society, our form of recognition for those who have included Wright State in their estate plans and informed us of their intentions, will be having an event on April 6 as an appreciation for those who have made this significant long-term commitment to the institution.

**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 November 14. It was customized with student features in each academic area. The primary audience for Fall Appeal is alumni, however without traditional Phonathon again in FY19, this appeal will also be sent to friends.

## Strategies

- Continue to personalize, including suggested giving amounts based on historical giving
  - Provide current donor club, if applicable
- Continue to solicit our most engaged alumni/friends utilizing our Wright State engagement scores in addition to utilizing our updated Wright State annual giving likelihood scores

### Fall Appeal Results

90 day results FY19	\$98,384	442 gifts
90 day results FY18	\$86,876	474 gifts
90 day results FY17	\$95,165	489 gifts
90 day results FY16	\$83,530	386 gifts

### **2019 CSIC – Campus Scholarship and Innovation Campaign**

The 2018 CSIC campaign reporting year officially closed in December, we saw a 3% increase in participation in 2018.

The 2019 faculty, staff, retiree campaign will launch on Monday, April 1<sup>st</sup> and run for five weeks concluding on May 3.

Retiree strategy will be developed with the Retirees 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 was cancelled due to the faculty strike
- Wed to Wed Alumni, February
- Spring all donor categories and donor types, March – April

**Advancement Committee Report**  
***Discover Your Story: Archives Campaign Report***  
**March 2019**

**Project Update:**

- The Archives Team is collaborating with Facilities on the best opportunity to create a Reading Room for use by the public and our university community. Additionally they're working on how best to house the massive Collections so they are in environmentally protected spaces.
- Dawne Dewey, Head, Special Collections and Archives and her team are offering a tour of our Collections to the members of the University Board of Trustees when a convenient time may be scheduled.

**Campaign Fundraising:**

- We've submitted multiple proposals to national and local foundations for support of the project and have been successful in securing new gifts. We've submitted additional proposals that are currently being evaluated by local foundations.

**Archives Tours**

- Dawne Dewey continues to offer tours to prospective donors and to community members with the hope of introducing people to our collections and helping to spread the word about the project.

**Gifts Committed to Date:**

- To date, we've raised \$907,000 toward the goal of \$6.5 million in CASH.
- There are 5 named spaces included in the giving totals
  - √ Amanda Wright Lane Lobby
  - √ Dr. Lewis Shupe Oral History Lab
  - √ Dr. Gary Barlow Conference Room
  - √ Makino, Inc. Volunteer and Student Center
  - √ Linda Black-Kurek Family Foundation Exhibit Gallery

**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.