

**WRIGHT STATE UNIVERSITY  
BOARD OF TRUSTEES**

**Advancement Committee Report  
January 2015**

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

**Advancement Committee Report  
Alumni Relations Report  
January 2015**

**Alumni Leader’s Conference Planned:**

First Annual Alumni Leaders Conference will bring together leaders of Alumni Societies and Networks for a day of discussion, education, and collaboration. Topics to be discussed: Society/Network board (committee) development and succession planning, volunteer recruitment, social media best practices. The event will include updates from President Hopkins about Wright State and the Rise. Shine. Campaign.

**Event and Social Media Totals for 2014:**

- Our event attendance continues to grow with **8,141** attendees at our events in 2014. This compares to **7,672** in 2013 and **6,642** in 2012.
- Our social media presence has exploded, and Facebook followers increased over 300% this year:
  - Facebook
    - 2014 – **8,392**                      2013 – **2,445**                      2012 – **2,024**
  - Twitter
    - 2014 – **1,280**                      2013 – **772**                      2012 – **385**
  - Linked In
    - 2014 – **6,900**                      2013 – **6,287**                      2012 – **5,335**

**Society Updates:**

- Model UN Alumni Society Annual Alumni/Student Holiday gathering – Dec. 4 - The Annual MUN student/alumni gathering hosted 35 guests.
- CONH Alumni Society established a scholarship fund to support College of Nursing and Health students in the fall of 2014 and moved \$1000 from their 2014 fundraising efforts into the fund at the end of December.

**Regional Network Updates:**

Many of the Alumni Networks have been busy planning events and providing many opportunities for alumni engagement throughout the state of Ohio and across the United States.

- In November, the Washington DC/Maryland Alumni Network and the Greater New York City Alumni Network hosted happy hours at local establishments. These events are great opportunities for alumni in these regions to reconnect with each other and to also learn about other opportunities in their region.

- The Washington DC Network and New York City Network are also working with the Alumni Relations Staff to identify current students who are participating in fellowships, internships, or co-ops in the two regions so that the alumni leaders can reach out to the students to provide support and assist with their transition to a new area. We are currently working with academic units across campus to help us identify students who are currently in these regions or plan to move to either NYC or DC over the spring and summer semesters. We believe that by assisting current students with their transition and inviting them to alumni events hosted in those regions, we will build a stronger relationship and level of engagement than trying to engage them for the first time after graduation.
- In Ohio, our Columbus, Cleveland, Dayton, Cincinnati, and Lake Campus Networks have been very busy hosting many events and long-term projects. For example, the Lake Campus Network has been working with community leaders to implement a discount program for students and alumni at local establishments in the Celina/Mercer County region. The Alumni Network has ordered window signs to go in local establishments to indicate what businesses are supporting this program. Over the next year, the network hopes this initiative is successful and grows.
- Like the Washington DC and NYC Networks, the Cincinnati Network is focused on connecting with current students and helping those who are interested in moving to the Cincinnati region post-graduation. Once again, initiatives such as this will take time, strong communication efforts, and collaboration with campus partners to be successful. The Cincinnati Network is also looking forward to sponsoring a Continual Education Credit (CEC) for local teachers and education professionals since many school districts require CEC's throughout the academic year.
- The Dayton Alumni Network continues to support the strong alumni base in Dayton and Raider Country. In December, the network made a \$200 donation to CHOICES, Inc., an organization that assists foster children as they transition out of the foster system at the age of 18. The Dayton Network is also hosting a theatre and wine event on January 31st that exposes alumni to our talented students in the theater department. This year, alumni attendees will enjoy the student performance of Pride and Prejudice.
- Wright State Men's vs. OSU Basketball Event – Dec. 27 - The Columbus Alumni Network and the Alumni Association hosted a pre-game tailgate at Eddie George's Bar and Grille on High Street two hours prior to tip-off. This event was very successful. The Alumni Association sold 120 tickets to the basketball game and over 150 attendees at the pre-game event at Eddie George's.

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

- January 31 - Pride and Prejudice Wine Tasting and Play
- February 4 - Career Webinar: Proven Strategies to Build a Network That Works For You

- February 5 - Cincinnati Alumni Network Happy Hour at The Dingle House
- February 7 - Wright State vs. Cleveland State Men's basketball tailgate and game
- February 12 - Raider Round up SAA and Student Government event
- February 19 - Greater Columbus Alumni Network Wine Tasting at the Wine Bistro
- February 21 - Gulf Coast Rise. Shine. Event
- February 27 - Dayton Alumni Network Happy Hour at Warped Wing Brewery
- February 28 - Alumni Leaders Conference
- February 28 - College Outstanding Alumni Awards
- February 28 - Rowdy Gras
- March 3 - 9 - Civil Rights Pilgrimage
- March 4 - Career Webinar: Stuff Your Resume With Keywords to Highlight Your Experience
- March 28 - ARTSGALA
- April 1 - Career Webinar: Use Your Strengths to Create a Rewarding and Satisfying Career
- April 9 – CONH Alumni Society Education Offering: Law Update
- April 7 - 18 - Kenya Unmatched Safari
- April 20 – 24 – Senior Week
- April 24 – Amigos Latinos Alumni and Friends Gala

**Advancement Committee Report  
Wright State University Foundation Report  
January 2015**

Volatility in the financial markets that began in the first quarter of the fiscal year continued during the second. Our endowment portfolio suffered sizable losses in the final month of the quarter (as it did the previous quarter), ending the period with a market value of \$78.2 million. On a relative basis, the portfolio outperformed its associated composite benchmark by 26 basis points. The total fiscal year-to-date return on the endowment portfolio was slightly positive at +0.08%. Equity returns were dragged down by negative earnings in the international equity space. Domestic equities returned 4.4% for the first six months of the year, but world equities lost 7.5%. Fixed income returns were barely positive, with core fixed income providing a positive 2.4% return and high yield and emerging markets debt investments both losing ground. Alternative investments were also down slightly; only our structured credit (distressed debt) investment reported positive earnings for the six-month period.

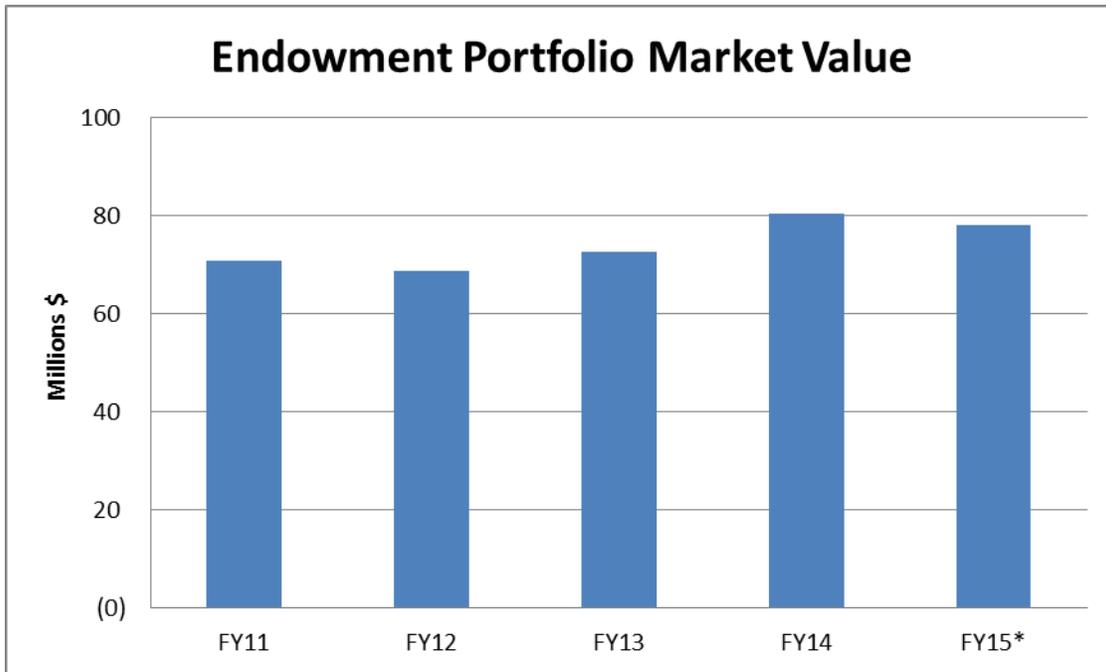
The Foundation's budget was hit by some large (although anticipated) expenditures during the second quarter of the fiscal year. In October, we made a public declaration of our comprehensive campaign, known as *Rise. Shine.*, at the Nutter Center. The costs of this event were totally underwritten by the Foundation. Expenses associated with the campaign continued to add up in anticipation of several mini-launches for the campaign which will be held throughout the country. To date, the campaign has raised more than \$110 million towards its \$150 million goal. The other significant expense during the second quarter involved payments made to vendors involved with the University's branding initiative. The Foundation committed \$1 million toward this effort for fiscal year 2015.

The Foundation's current endowment target allocation, actual allocation, and market values as of December 31, 2014, are presented below:

**Endowment Portfolio Composition**

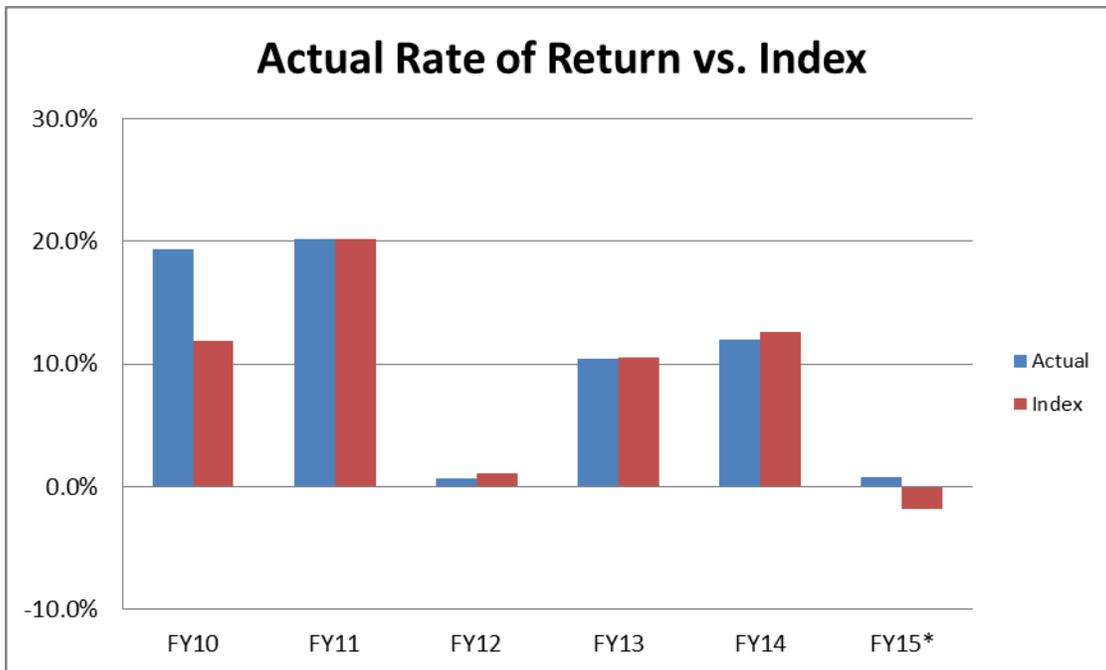
<b>Asset Class</b>	<b>Target Allocation</b>	<b>Actual Allocation</b>	<b>Market Value December 31, 2014</b>
<b>Equity</b>	<b>43%</b>	<b>51%</b>	<b>\$39,756,429</b>
<b>Fixed income</b>	<b>32%</b>	<b>29%</b>	<b>22,888,078</b>
<b>Hedge funds</b>	<b>14%</b>	<b>13%</b>	<b>10,104,009</b>
<b>Private equity</b>	<b>8%</b>	<b>3%</b>	<b>2,608,744</b>
<b>Structured credit</b>	<b>3%</b>	<b>4%</b>	<b>2,819,371</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>\$78,176,631</b>

**Endowment Value**



\*To December 31, 2014

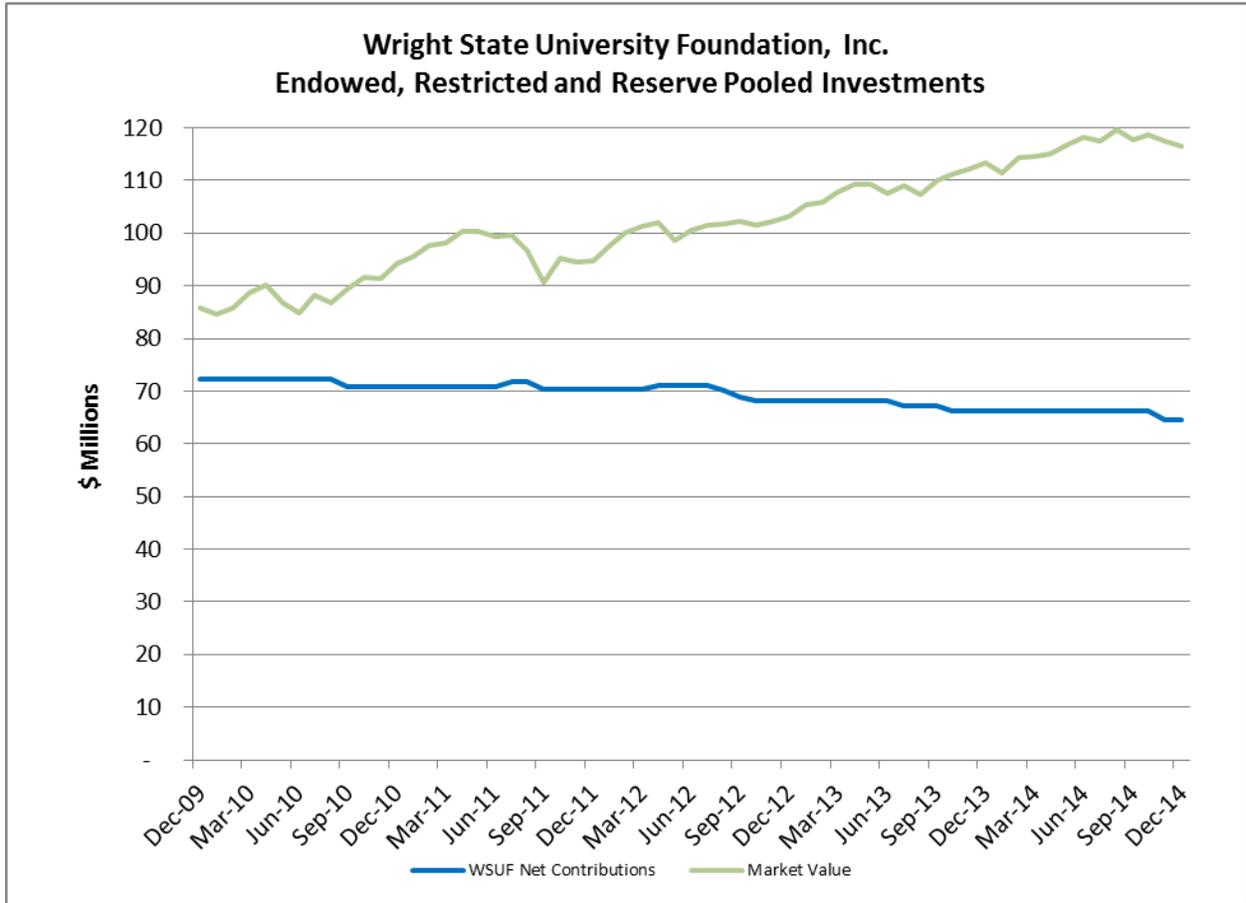
**Endowment Historical Rates of Return**



\*To December 31, 2014

Current index composed of Russell 1000 (20.2%), Barclays US Aggregate Index (15.0%), MCSI All Country World Ex US Index (13.5%), Barclays Capital 1-5 Yr US TIPS Index (14.1%), HFR FOF Diversified (14.1%), Russell 2000 (5.8%), 50% S&P 500/50% Barclays 10 Yr Trea BW (3.9%), BOFA ML US HY Master II Index (3.9%), JPM EMBI Global Diversified (2.9%), DJ Wilshire Resi (3.3%), SOF Structured Credit Fund (3.3%).

**All Portfolios Value vs. Contributions**



**WRIGHT STATE UNIVERSITY FOUNDATION, INC.**  
**Report of Total Receipts: Cash and Gifts-in-Kind**  
**For the Month Ended December 31, 2014 and 2013**

**MONTH-TO-DATE**

GIFT SOURCE	DEC 2014		DEC 2013		PCT. CHANGE	
	DONORS	DOLLARS	DONORS	DOLLARS	DONORS	DOLLARS
Alumni	703	\$245,488	772	\$225,526	-9%	9%
Corporations	66	184,702	82	963,139	-20%	-81%
Foundations and Organizations	24	236,331	22	174,207	9%	36%
Friends	540	529,658	645	451,053	-16%	17%
<b><i>SUBTOTAL CASH RECEIPTS</i></b>	<b>1,333</b>	<b>\$1,196,179</b>	<b>1,521</b>	<b>\$1,813,925</b>	<b>-12%</b>	<b>-34%</b>
Gifts-in-kind	9	72,812	5	2,106,003	80%	-97%
<b><i>TOTAL ALL RECEIPTS</i></b>	<b>1,342</b>	<b>\$1,268,991</b>	<b>1,526</b>	<b>\$3,919,928</b>	<b>-12%</b>	<b>-68%</b>

**FISCAL-YEAR-TO-DATE**

GIFT SOURCE	FY2015		FY2014		PCT. CHANGE	
	DONORS	DOLLARS	DONORS	DOLLARS	DONORS	DOLLARS
Alumni	1,935	\$560,618	2,210	\$529,636	-12%	6%
Corporations	165	1,528,039	193	1,798,761	-15%	-15%
Foundations and Organizations	68	509,304	62	819,915	10%	-38%
Friends	1,551	915,083	1,784	1,063,019	-13%	-14%
<b><i>SUBTOTAL CASH RECEIPTS</i></b>	<b>3,719</b>	<b>\$3,513,044</b>	<b>4,249</b>	<b>\$4,211,331</b>	<b>-12%</b>	<b>-17%</b>
Gifts-in-kind	35	282,862	17	2,309,273	106%	-88%
<b><i>TOTAL ALL RECEIPTS</i></b>	<b>3,754</b>	<b>\$3,795,906</b>	<b>4,266</b>	<b>\$6,520,604</b>	<b>-12%</b>	<b>-42%</b>

**WRIGHT STATE UNIVERSITY FOUNDATION, INC.**

**Report of Fundraising Totals By Source and Unit**

**Fiscal Year-to-Date to December 31, 2014**

(including totals from prior fiscal year)

**BY SOURCE**

SOURCE	CASH <sup>1</sup>	PLEDGES <sup>2</sup>	IRREVOCABLE DEFERRED GIFTS <sup>3</sup>	GIFTS OF PROPERTY <sup>4</sup>	REVOCABLE DEFERRED GIFTS <sup>5</sup>	CURRENT FYTD	PRIOR FYTD
						TOTALS	TOTALS
Alumni	\$368,402	\$268,667	\$1,227,583	\$7,973	\$130,000	\$2,002,625	\$2,607,605
Corporations	940,504	1,960,500	0	167,861	0	3,068,865	2,637,011
Foundations and Organizations	485,304	70,000	0	59,867	0	615,171	919,681
Friends	476,884	254,866	0	47,161	195,000	973,911	5,445,237
<b>CURRENT FYTD TOTALS</b>	<b>\$2,271,094</b>	<b>\$2,554,033</b>	<b>\$1,227,583</b>	<b>\$282,862</b>	<b>\$325,000</b>	<b>\$6,660,572</b>	
<b>PRIOR FYTD TOTALS</b>	<b>\$2,231,333</b>	<b>\$598,150</b>	<b>\$50,000</b>	<b>\$2,309,273</b>	<b>\$6,420,778</b>		<b>\$11,609,534</b>
<b>% CHANGE FROM PRIOR FISCAL YEAR</b>	<b>1.8%</b>	<b>327.0%</b>	<b>2355.2%</b>	<b>-87.8%</b>	<b>-94.9%</b>	<b>-42.6%</b>	

**BY UNIT**

UNIT	CASH <sup>1</sup>	PLEDGES <sup>2</sup>	IRREVOCABLE DEFERRED GIFTS <sup>3</sup>	GIFTS OF PROPERTY <sup>4</sup>	REVOCABLE DEFERRED GIFTS <sup>5</sup>	CURRENT FYTD	PRIOR FYTD
						TOTALS	TOTALS
Boonshoft School of Medicine	\$430,130	\$656,725	\$227,583	\$0	\$20,000	\$1,334,438	\$3,928,153
College of Education & Human Services	15,836	13,914	0	0	0	29,750	94,832
College of Engineering & Computer Science	127,331	4,626	0	0	0	131,957	192,743
College of Liberal Arts	230,422	74,883	0	24,364	190,000	519,669	686,231
College of Nursing & Health	298,330	1,218,440	0	59,528	0	1,576,298	329,651
College of Science & Math	28,130	6,955	0	0	0	35,085	105,634
Curriculum & Instruction	10,897	795	0	12,075	0	23,767	13,145
Enrollment Management	35,446	22,390	0	0	0	57,836	32,108
Intercollegiate Athletics	270,215	223,355	0	0	0	493,570	598,964
Lake Campus	118,046	1,455	0	20,969	0	140,470	121,094
Other	516,584	58,282	1,000,000	129,530	65,000	1,769,396	5,226,003
Raj Soin College of Business	130,221	264,829	0	0	0	395,050	135,912
School of Professional Psychology	12,175	400	0	0	0	12,575	4,135
Student Affairs	37,741	634	0	4,575	50,000	92,950	111,050
University College	530	0	0	0	0	530	165
University Libraries	9,060	6,350	0	31,821	0	47,231	29,713
<b>CURRENT FYTD TOTALS</b>	<b>\$2,271,094</b>	<b>\$2,554,033</b>	<b>\$1,227,583</b>	<b>\$282,862</b>	<b>\$325,000</b>	<b>\$6,660,572</b>	
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<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.

**Advancement Committee Report  
Development Report  
January 2015**

**Planned Giving Update**

In the first six months of the fiscal year, six new and one re-characterized planned gifts were received. Their projected value is \$1,552,583. Two of the gifts were new life insurance policies taken out by the Foundation, but donated by alumni. The remainder are bequests.

There are an additional 6 planned gifts in discussion with an estimated projected value of \$4.3 million, and 30 planned gifts that 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 Phonathon – September 6 through October 23**

55 student callers raised \$152,152, from 1,960 contributors.

During Phonathon, there was a strong emphasis put on pledge fulfillment.

- As a result, our percentage of credit card contributions increased.
- Phonathon manager enforced stronger pledge verifications to ensure a larger fulfillment rate.

Fall Fulfillment Rate: As of mid-January, it is 73% compared to all of FY14, which was approximately 63%.

**Fall Direct Mail Appeal**

The annual fall direct mail appeal began on October 24 following the end of the Fall Phonathon Campaign and public launch of the Campaign. It was customized with students in each academic area who received the appeal and the appeal was branded with the Campaign's *Rise. Shine.* markings.

New initiatives included:

- Suggested giving amounts
- Encouraging donors to jump up to the next giving society
- The Wright State University Alumni Association scholarship appeal

60-Day Results

- \$57,661 from 324 donors compared to 60-Day results FY14 \$30,701 from 232 donors.

### **Spring Phonathon – February 7 – April 2**

Student Callers will begin on Saturday February 7.

New initiatives include:

- Rise.Shine. Campaign Messaging will be incorporated into all calling segments
- Additional calling segments have been added compared to Spring 2014
  - Alumni Association membership
  - Increased alumni affinity – 13 affinities identified
  - Alumni non-donors who have attended at least one University event in the last five years
  - Alumni non-donors with an annual giving likelihood Blackbaud score of 600 or more

### **CSIC 2015**

The annual faculty staff campaign will launch on Thursday, February 26<sup>th</sup>. 2014 CSIC results are calculated through December 31, 2014; official results are pending.

### **Student Giving**

Increasing student understanding of philanthropy and student giving to Wright State will receive particular emphasis this academic year. A focus group to assist in understanding student perceptions of, and interests in, giving to the University attracted 21 students. Working with Student Affairs and Alumni Relations, we will be engaging major student organizations to develop a new plan for student giving. Annual Giving and Alumni Relations staff will work with, and through, the Student Philanthropy Council and Student Alumni Council in this effort.

The first touch point took place on #GivingTuesday, December 2. #GivingTuesday is a global day dedicated to giving back. #GivingTuesday brought in just over \$6,193 from 62 donors.

The second touch point will take place in February. February is Student Engagement and Philanthropy Month (SEP) in partnership with CASE. Institutional members will organize events and activities throughout February to enhance awareness and engagement of students in higher education advancement.

Throughout the month of February, student organizations, as well as campus teams who sign up, will be fundraising all month long and competing with one another to see which team

can raise the most funds. All funds will support WSU Foundation funds. We will conclude with a student event, the Tunnel Takeover, a 5K walk for \$5K on February 26<sup>th</sup>, which will conclude in the Student Union Atrium with a celebration, followed by the 2015 CSIC Campaign Kickoff for faculty, staff and students.

**Advancement Committee Report**  
**Rise. Shine. *The Campaign for Wright State University***  
**January 2015**

**Comprehensive Campaign Activity**

- Gifts and pledges of **\$110,576,720** have been accepted as of 12/31/14
- Tracking of the four donor classifications includes these totals:

Alumni	\$23,480,996	21.2%
Friends	\$31,951,003	28.9%
Corporations	\$46,915,365	42.4%
Foundations	\$ 8,229,354	7.4%

- Gifts have been committed in these three areas:

Individuals	\$37,722,666	75% of goal
Environments	\$38,852,572	78% of goal
Innovations	\$34,001,482	68% of goal

**Campaign Creative Platform**

All campaign materials and products are now completed and available for use. The platform includes the following resources:

- University case statement
- Folders and proposal covers
- Mini university case statement for launch events
- 12 individual case documents for colleges/schools/Lake campus/units
- Campaign videos (mini launches and faculty/staff campaign)
- Tom Hanks commercials
- Social media channels
- Campaign website
- Annual fund appeals (3 versions)
- Campaign notecards, business cards

**Mini-Launch Events**

We will replicate the highly successful October 18<sup>th</sup> public launch event throughout 2015 with a series of mini-launches in specified geographies. The program will be duplicated and include remarks from Campaign Co-Chair Amanda Wright Lane, the campaign video, student Rise. and Alumni Shine. stories, Tom Hanks video, and President Hopkins' call to action.

The first such event is scheduled for Saturday evening, February 21<sup>st</sup>, at the Salvador Dali Museum in St. Petersburg. Invitations have been extended to 1,400 Gulf Coast alumni and friends. The event has been planned by an area host committee, and will be co-hosted by the

members of the President's Campaign Cabinet, the WSU Foundation Board of Trustees, University Deans, and Advancement staff.