

**WRIGHT STATE UNIVERSITY  
BOARD OF TRUSTEES**

**Advancement Committee Report  
April 2014**

1. Alumni Relations Report
2. Wright State Foundation Financial Report
3. Development Report
4. Comprehensive Campaign Report
5. Communications and Marketing Report

**Advancement Committee Report  
Alumni Relations Report  
April 2014**

- Announcement of our new team member, Nick Warrington. Nick will join the Alumni team in late May as Assistant Director.

Nick Warrington, native of Wellston, Ohio, received his Bachelors of Science degree in Middle Childhood Education from Wright State University in 2012. While at Wright State, Nick served as a Resident Assistant, President's Ambassador, member of Sigma Phi Epsilon Fraternity, Omicron Delta Kappa (ODK), and Vice President of Student Government.

Nick attended graduate school at Virginia Polytechnic Institute and State University, commonly known as Virginia Tech, in the fall of 2012 where he studied Educational Leadership and Policy Studies. Nick will be graduating with his masters in May of this year.

While at Virginia Tech, Nick held an assistantship with the Center for the Enhancement of Engineering Diversity as a Graduate Teaching Assistant and Student Centers and Activities as the Graduate Advisor to the Virginia Tech Union, a student lead programming board. Nick also worked with the Division of Student Affairs Parent and Alumni Relations office and served as chapter advisor for Sigma Phi Epsilon and Farm House fraternities.

In May of 2013, the Virginia Tech Board of Visitors, the university's governing board composed of 14 members, 13 of which are appointed by the governor and the 14<sup>th</sup> member is the president of the Board of Agriculture and Consumer Services, appointed Nick to serve a one-year term as the Graduate Student Representative to the Board of Visitors. Over the course of his tenure, Nick has advocated for affordable childcare services and facilities for graduate students, increased graduate student stipends, and the re-organization of the university governance structure.

- A new Graduate Assistant will join Alumni Relations in May. Brandon Semler, undergrad student at Wright State University, Bachelor of Arts in Mass Communication, May 2014.

Brandon has been involved with several on campus activities including:

- Student Instructor, first year programs
- Vice President, Men's Chorale
- Editor-In-Chief, The Guardian

Brandon will join the Alumni Relations team in May as a graduate student in the Student Affairs in Higher Education program at Wright State.

- **DC Alumni Network**
  - Transitioned new officers.

- **Tampa Alumni Network**
  - Transitioned new officers.
- **Major transition**
  - Proposals for the model of alumni relations and a new scholarship funding and awarding proposal will be considered at May 10<sup>th</sup> Alumni Association board meeting. More details forthcoming.
- **Regional Campaign**
  - We will be launching a regional campaign in 10 cities nationwide as part of the public launch of the comprehensive campaign, “Rise. Shine.”

#### Upcoming Wright State Alumni Events

- April 9 – Wright State University Lake Campus Baseball game
- April 10 – Cincinnati Alumni Happy Hour
- April 11-12 – Relay for Life at WSU, several WSU networks and societies are participating
- April 16 – Dayton Alumni and African American Alumni Society Happy Hour
- April 17-24 – Senior Week
- April 18 – Model United Nations Alumni Meet the 2014 Team
- April 26 – Wright State University Lake Campus “Annual Lake Cleanup Day”
- April 30 – New York City Wright State University Senior Showcase
- May 2-3 – Biomedical Sciences PhD Program Celebrates 200 Graduates
- May 10 – Amigos Latinos Gala
- May 12 – Social Work Alumni Society Ice Cream Social
- May 17 – Alumni Association Scene 75 Outing
- May 17 – Wright State Motion Pictures Alumni Society Reunion
- June 22 – Cleveland Alumni Network Cleveland Indians Outing
- June 27-29 – Theatre and Dance Reunion (1974-1994)

#### Event Updates:

##### Beer Tasting – January 17

A fabulous team of volunteers led by Woody Willis carefully selected the beers and wines that our **200 guests** sampled. The event was a hit as usual and the Graduates of the Last Decade group hosted their second annual basketball and beer event to draw a younger group of alumni to the annual beer tasting.

##### Raider Spirit Rally – Feb 25

The Student Alumni Association took their annual Raider Spirit Rally to new heights this year. In an effort to reach more students, SAA collaborated with Student Government for this event. **144 students** participated in the tailgate style event.

### 2014 College Outstanding Alumni Awards – March 1

10 Outstanding Alumni were recognized at the annual COAA event. Six of the award recipients were able to attend. Awards were presented by Deans and Assistant Deans of the Colleges. **98 guests** were in attendance to honor this group of talented and accomplished alumni.

### Rowdy Gras – March 1

A record attendance this year, **241 guests** enjoyed our annual casino night. Additions to the event this year include a photo booth, contests and dancing to earn more money to play. The additional activities were well received. Guests who were successful in their casino playing endeavors were excited to attempt to win one of many items donated by WPCU, Barnes and Noble at Wright State, Wright State University Nutter Center, Wright State Athletics, and Liberty Mutual.

### College of Nursing and Health 40<sup>th</sup> Anniversary – March 20

The celebration of 40 years of the College of Nursing and Health was a success. A luncheon featuring keynote address, “Don’t Get Married Unless: What’s the Connection to Good Health?” by Lorraine Wright, R.N., Ph.D., an international lecturer, author and consultant in family nursing and family therapy drew **132 attendees**.

The conference, co-sponsored by CONH Zeta Phi Chapter, Sigma Theta Tau International Honor Society showcased scholarly works in the Miami Valley. The event conference drew **82 guests** including 25 CONH students.

The evening activities included a reception and theater event. The reception, hosted in the Endeavor Rooms in the Student Union drew **143 guests**. **69 of those participants** then attended Wright State Theatre’s performance of Les Misérables.

**Advancement Committee Report  
Wright State University Foundation Report  
April 2014**

Market returns were negative in the first month of 2014, but strongly rebounded in February. The Foundation’s endowment portfolio ended the month with a market value of \$77.9 million, an increase of \$0.7 million since our last report and \$5.2 million since July 1, 2013. The portfolio’s fiscal year return at the end of February was 9.0%, ten basis points higher than its composite benchmark. All classes of assets have provided positive returns for the year, with U.S. equities and private equity providing the strongest performance. Distressed debt investments have also provided solid returns for the year. Even fixed income has provided a slightly positive return during the period. At the end of February, all asset allocations were within their approved target bands. The over allocation to equities resulted partially from private equity commitments not yet called that were invested temporarily in equity funds. You will note that we have reallocated away from fixed income investments towards equity investments since the last report, although we are not completely comfortable in the equity space either. The Foundation’s Investment Committee continues to explore alternative investments that will be able to weather anticipated negative activity in the stock and bond markets.

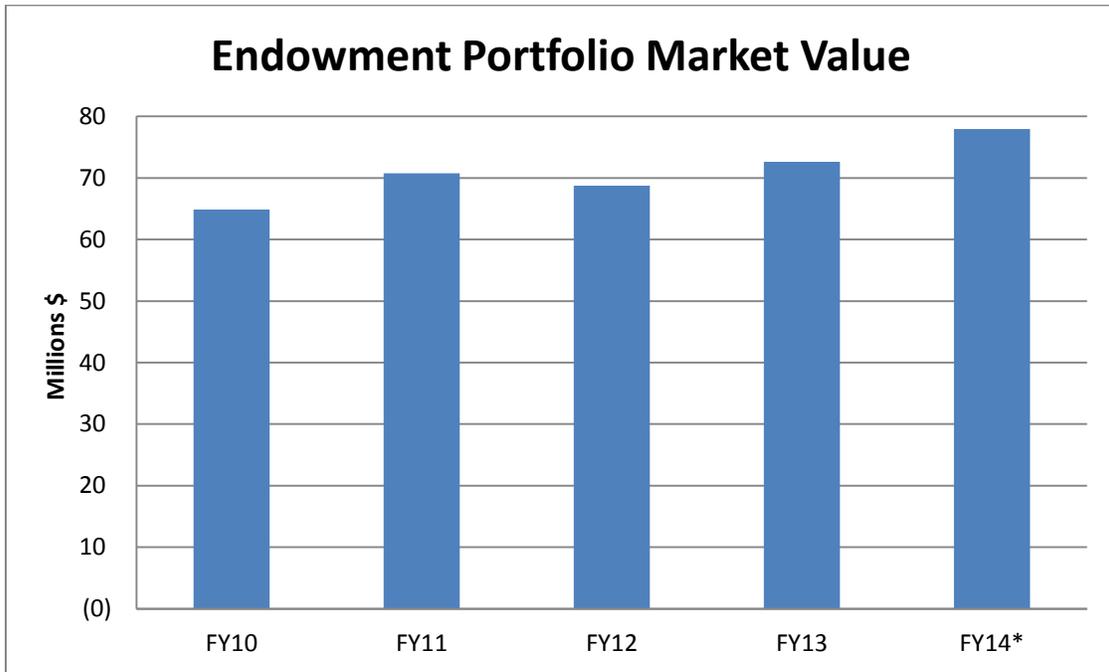
The Foundation was pleased to participate in the University’s recent ITN for Investment Advisory Services. Board and Investment Committee member Dave Deptula and Foundation CFO Bob Batson helped staff the committee that issued the ITN, reviewed responses and interviewed six of the best respondents. It was beneficial for the Foundation to review best-of-class investment firms and their offerings since it has been a number of years since we have gone through the same process.

The Foundation’s current endowment target allocation, actual allocation and market values as of February 28, 2014, are presented below:

**Endowment Portfolio Composition**

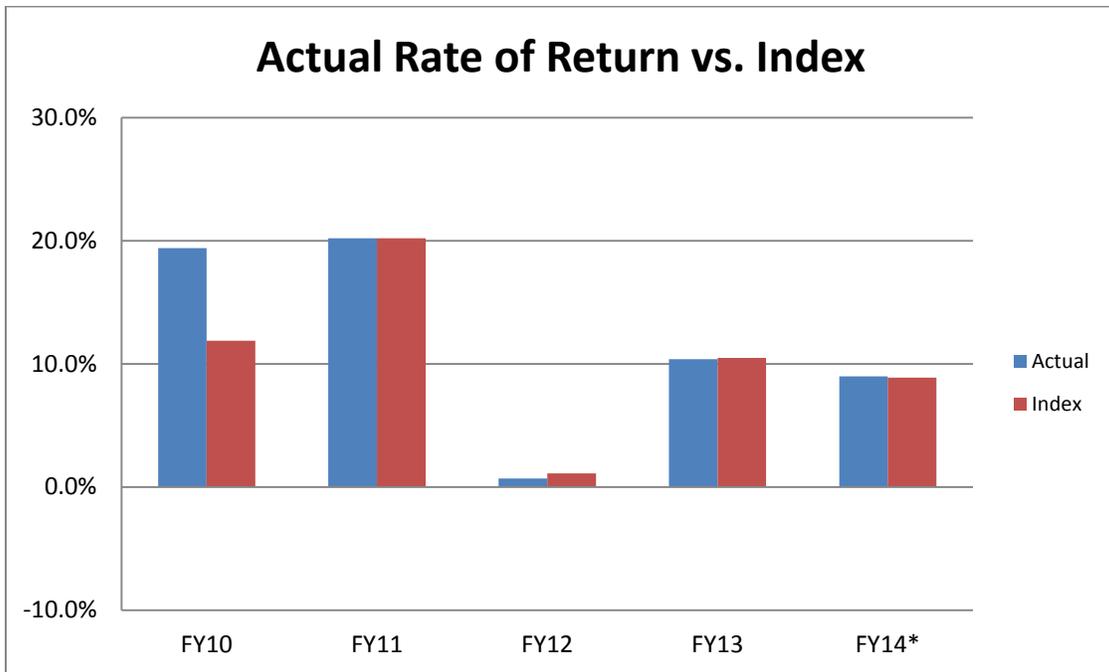
<b>Asset Class</b>	<b>Target Allocation</b>	<b>Actual Allocation</b>	<b>Market Value February 28, 2014</b>
<b>Equity</b>	<b>43%</b>	<b>58%</b>	<b>\$44,993,979</b>
<b>Fixed income</b>	<b>32%</b>	<b>23%</b>	<b>18,235,961</b>
<b>Hedge funds</b>	<b>14%</b>	<b>13%</b>	<b>9,898,446</b>
<b>Private equity</b>	<b>8%</b>	<b>3%</b>	<b>2,147,924</b>
<b>Structured credit</b>	<b>3%</b>	<b>3%</b>	<b>2,672,938</b>
<b>Cash &amp; equivalents</b>	<b>0%</b>	<b>0%</b>	<b>1,864</b>
<b>Totals</b>	<b>100%</b>	<b>100%</b>	<b>\$77,951,112</b>

Endowment Value



\*To February 28, 2014

Endowment Historical Rates of Return

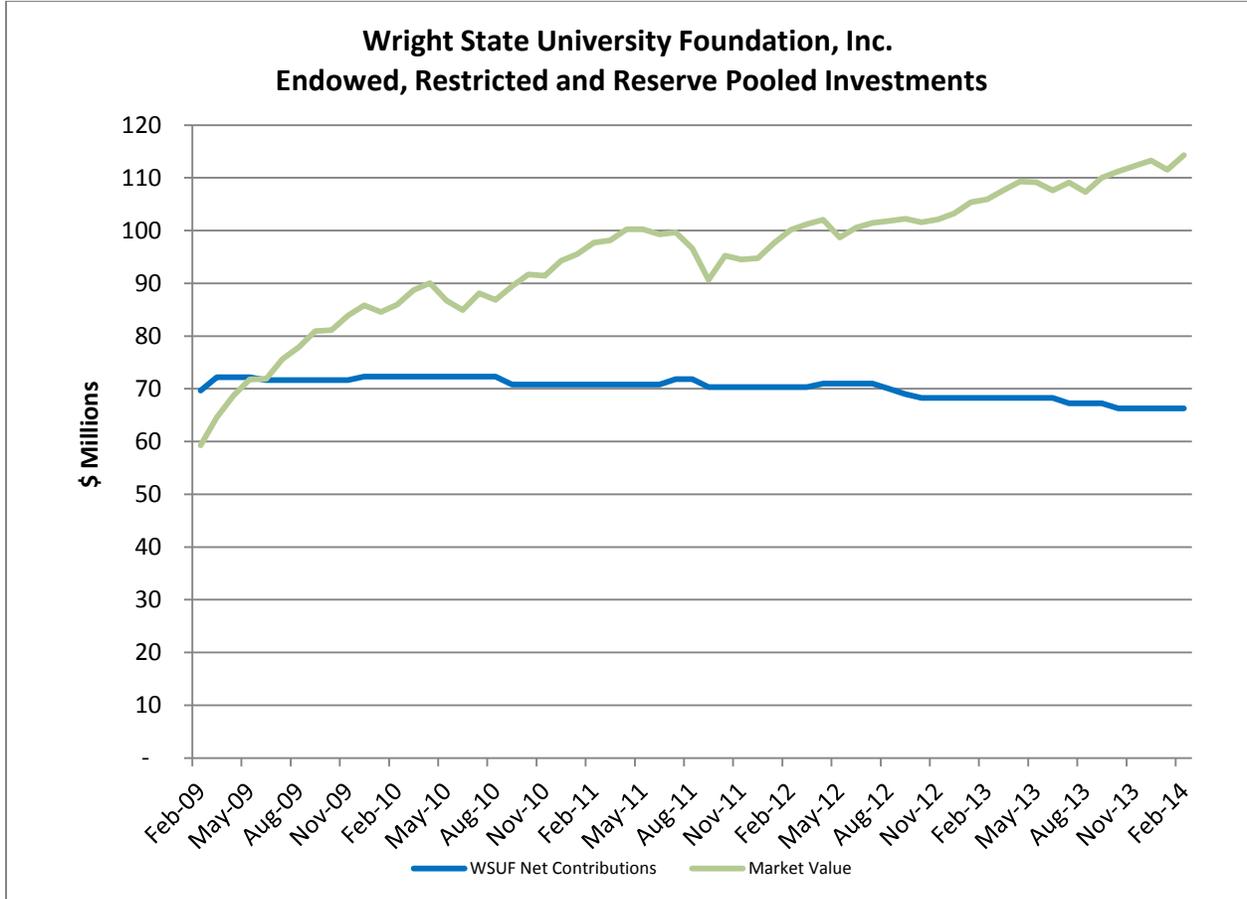


\*To February 28, 2014

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.**  
**Fiscal Year 2014 to Date through March 31, 2014**

**FISCAL-YEAR-TO-DATE**

GIFT SOURCE	FY2014	
	DONORS	DOLLARS
Alumni	2,824	\$700,063
Corporations	242	2,172,688
Foundations and Organizations	75	927,891
Friends	2,323	1,296,644
<b><i>SUBTOTAL CASH RECEIPTS</i></b>	<b>5,464</b>	<b>\$5,097,286</b>
Gifts-in-kind	80	3,290,481
<b><i>TOTAL ALL RECEIPTS</i></b>	<b>5,544</b>	<b>\$8,387,767</b>

**FISCAL-YEAR-TO-DATE**

GIFT SOURCE	FY2013	
	DONORS	DOLLARS
Alumni	2,506	\$992,857
Corporations	263	1,836,244
Foundations and Organizations	80	796,221
Friends	1,741	797,163
<b><i>SUBTOTAL CASH RECEIPTS</i></b>	<b>4,590</b>	<b>\$4,422,485</b>
Gifts-in-kind	123	190,509
<b><i>TOTAL ALL RECEIPTS</i></b>	<b>4,713</b>	<b>\$4,612,994</b>

**FISCAL-YEAR-TO-DATE**

GIFT SOURCE	PCT. CHANGE	
	DONORS	DOLLARS
Alumni	13%	-29%
Corporations	-8%	18%
Foundations and Organizations	-6%	17%
Friends	33%	63%
<b><i>SUBTOTAL CASH RECEIPTS</i></b>	<b>19%</b>	<b>15%</b>
Gifts-in-kind	-35%	1627%
<b><i>TOTAL ALL RECEIPTS</i></b>	<b>18%</b>	<b>82%</b>

**WRIGHT STATE UNIVERSITY FOUNDATION, INC.**

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

**Fiscal Year-to-Date to March 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	\$446,172	\$564,967	\$31,597	\$27,463	\$2,600,000	\$3,670,199	\$2,962,171
Corporations	767,993	30,000	0	2,946,518	0	3,744,511	1,559,665
Foundations and Organizations	834,791	24,000	0	264,384	0	1,123,175	663,429
Friends	787,002	150,758	50,000	52,116	6,621,688	7,661,564	1,260,580
<b>CURRENT FYTD TOTALS</b>	<b>\$2,835,958</b>	<b>\$769,725</b>	<b>\$81,597</b>	<b>\$3,290,481</b>	<b>\$9,221,688</b>	<b>\$16,199,449</b>	
<b>PRIOR FYTD TOTALS</b>	<b>\$2,901,069</b>	<b>\$1,564,267</b>	<b>\$100,000</b>	<b>\$190,509</b>	<b>\$1,690,000</b>		<b>\$6,445,845</b>
<b>% CHANGE FROM PRIOR FISCAL YEAR</b>	<b>-2.2%</b>	<b>-50.8%</b>	<b>-18.4%</b>	<b>1627.2%</b>	<b>445.7%</b>	<b>151.3%</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	\$536,579	\$169,581	\$0	\$2,889,054	\$1,250,000	\$4,845,214	\$493,198
College of Education & Human Services	140,355	23,367	0	0	10,000	173,722	177,501
College of Engineering & Computer Science	216,477	15,705	0	0	0	232,182	625,318
College of Liberal Arts	271,860	182,337	0	166,197	2,323,410	2,943,804	744,066
College of Nursing & Health	331,201	9,290	0	195,506	0	535,997	211,778
College of Science & Math	50,914	7,915	0	0	55,000	113,829	286,816
Curriculum & Instruction	13,454	3,818	0	1,607	0	18,879	21,592
Enrollment Management	48,776	3,105	0	0	0	51,881	510,617
Intercollegiate Athletics	354,113	25,280	0	7,700	260,778	647,871	2,210,091
Lake Campus	206,146	5,990	0	6,328	0	218,464	249,077
Other	460,945	253,429	0	2,795	5,072,500	5,789,669	380,993
Raj Soin College of Business	124,059	63,003	31,597	0	250,000	468,659	193,558
School of Professional Psychology	1,930	3,450	0	0	0	5,380	16,958
Student Affairs	63,706	2,255	50,000	2,844	0	118,805	87,127
University College	140	50	0	0	0	190	225
University Libraries	15,303	1,150	0	18,450	0	34,903	236,930
<b>CURRENT FYTD TOTALS</b>	<b>\$2,835,958</b>	<b>\$769,725</b>	<b>\$81,597</b>	<b>\$3,290,481</b>	<b>\$9,221,688</b>	<b>\$16,199,449</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  
April 2014**

**Planned Giving Update**

We have secured 14 new planned gifts FY14 YTD for a projected gift value of \$7,252,375; two planned gifts are charitable gift annuities, the remainder are bequests. An additional gift-in-kind is currently recorded as a deferred gift (its value is \$2,050,910) although we anticipate it will be gifted outright in this fiscal year.

An additional 12 planned gifts are in discussion with an estimated projected value of \$5,140,000. Nineteen more potential planned gifts are in early stage discussions.

**Annual Giving Update**

**Phonathon**

The Spring Phonathon campaign was conducted from February 15 to April 9. With the fall and spring campaigns combined, the student callers have surpassed their goal of raising \$395,000. With two days of calling remaining, callers had raised \$417,948 in gifts, pledges, and matching gifts. Annual Giving employed the services of consultant Wilson-Bennett Technologies to manage this year's two Phonathon campaigns and significantly increased the dollars raised and gifts from new donors.

**Campus Scholarship and Innovation Campaign (CSIC)**

The 2014 CSIC, *Destination: Wright State*, kicked off on March 3. At the conclusion of week 5, CSIC has brought in a total of \$328,770, and 40% of our full-time faculty and staff have participated. This is a 2% increase over last year's participation at the end of week 5, and \$55,992 more than last year's total at this time. Our goal is to reach \$405,000 by May 3<sup>rd</sup>, and 55% participation by the end of the year.

The Office of Annual Giving is also working closely with the WSU Retirees Association to increase retiree giving participation. Two anonymous donors have generously agreed to contribute a total of \$4,000 to match all contributions from retirees (up to \$100 each) who make their first gift (or first gift in the last five years) to Wright State.

**Student Giving**

The Student Philanthropy Council and Student Alumni Association are partnering to lead a student giving initiative at this year's April Craze. A total of 17 organizations on campus were given ceramic piggy banks to decorate. Each organization is featuring their pigs every Friday in front of the bookstore to collect money for the Fund4WrightState scholarship. At April Craze, these organizations will have their pigs at their table to collect votes (money) for the scholarship. At the end of April Craze, the group that raised the most money will receive publicity in a newsroom article about their organization as well as a small cash prize that will be distributed in the organization's budget next year.

**Advancement Committee Report  
The Campaign for Wright State University  
April 2014**

**Comprehensive Campaign Activity**

- Gifts and pledges of **\$94,826,278** have been accepted.
- FY '14 goal is **\$100,000,000**
- Tracking of the four donor classifications includes these totals:

Alumni	\$17,935,775	18.4%
Friends	\$28,852,152	30.4%
Corporations	\$40,715,760	42.9%
Foundations	\$ 7,322,590	7.7%

- Gifts have been committed in these four areas:

Academic support	\$44,553,567	127% of goal
Capital projects	\$14,269,409	57% of goal
Scholarships	\$23,909,871	32% of goal
University-wide	\$12,093,429	81% of goal

- Friday, April 11, 2014 is the next meeting of the President's National Campaign Cabinet. The meeting will profile the Boonshoft School of Medicine and include presentations on scholarship, leadership and research by three medical students, the highlights of the medical school presented by Dean Bowman, and tours of the facility to understand how teaching and research are conducted.

**Campaign Creative Platform**

Snaveley Associates from State College, PA, has been retained to prepare all the campaign materials in preparation for the fall '14 public launch. These materials will include:

- Campaign theme and identity
- University case statement
- 12 individual case documents for colleges/schools/Lake campus/units
- Campaign video
- Campaign microsite as a subset of the university's website
- Annual fund appeals (3 versions)
- Campaign business products

**Public Launch**

We are holding three dates—October 11, October 18, and November 1 as possible launch dates.

**Advancement Committee Report  
Communications and Marketing Report  
April 2014**

**Print and Advertising**

The spring 2014 issue of *Wright State University Magazine* was written, edited, designed, printed, and mailed to 80,000 alumni and friends of the university. The magazine is also available online.

In addition, 105 print/advertising projects were completed in February and March.

We created an RN2BSN marketing program including newspaper print and banner ads and outdoor billboards and are awaiting confirmation of budget.

Began concept work on potential new advertising campaign for the university.

**Web**

The following websites went live during this period:

Distance Education: <http://www.wright.edu/distance-education>

- new site designed in conjunction with the new Distance Education office
- worked closely with their office to incorporate new content

Graduate School refresh: <http://www.wright.edu/graduate-school>

- a complete redesign and refresh of the organization of the Graduate School website
- new design directly aligned with market research and strict design guidelines
- clarified and simplified navigation

Student Affairs: <http://www.wright.edu/student-affairs>

- completely new web presence for the division of Student Affairs

Calendar: <http://www.wright.edu/calendar>

- complete redesign of the top level calendar page
- all aspects of usability were improved
- simplified process for creating new events
- improved performance on mobile devices
- improved integration with other websites
- improved organization

Celebration of Research: <http://www.wright.edu/research/celebration-of-research-scholarship-and-creative-activities>

- updated for current year

Raider Connect: <http://www.wright.edu/raider-connect>

- updated the Raider Connect theme and some content

### **Social Media**

Katie Halberg, formerly our Senior Writer and Editor, was promoted to a new position of Director of Social Engagement. Ms. Halberg hired a staff of 3 students to assist with social media efforts.

New channels launched in February and March: Pinterest, Instagram, Tumblr

The Social Media Managers Group now includes 131 social media managers from across campus. Ms. Halberg presented a training session to them on Hashtags.

Current fans/followers on all social media channels: 84,461

### **Media Relations**

In February and March the media team posted 86 news releases regarding campus news and events, and received 44 WSU in the News posts in the Newsroom.