

**WRIGHT STATE UNIVERSITY
BOARD OF TRUSTEES**

**Advancement Committee Report
November 2014**

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

Alumni Relations Report November 2014

Membership Model Change: (Find more information at wrightstatealumni.com)

In the fall of 2014, the Wright State University Alumni Association will announce a new membership model. In September 2014, letters were mailed to all current and life alumni members explaining the model conversion. A full announcement will be made in the fall edition of the WSU Magazine.

The membership model change has met with little resistance and seems to be welcomed by most. Only one complaint has been received and it was resolved quickly.

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 Updates:

- Social Work Alumni Society Annual Beer and Wine Tasting – Sept. 17 - The Social Work Alumni Society raised over \$1,500 to support the already endowed Social Work Alumni Society Scholarship fund.

- Alumni Association Bourbon and Casino Trip – Sept. 27-28 - This event sold out this year at 54 attendees.

- Homecoming – October 3-4 - A record number of alumni returned to campus for Raider Homecoming and participated in an array of Homecoming events that were supported by various departments on campus. Friday evening there were over 250 alumni in the Apollo Wing of the Student Union for CEHS Trivia Night or the Alumni Achievement Awards. Throughout the weekend Raider Homecoming hosted nearly 1,000 participants.

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

- December 4 – Model UN Alumni Society board meeting and Holiday Gathering
- December 8 – Social Work Alumni Society Holiday Gathering
- December 5 – Indianapolis Fuel and Craft Beer Pit Stop Event
- December 27 – Wright State vs. Ohio State Men's basketball tailgate and game

- January 17 – Annual Alumni Beer Tasting
- January 17 – African American Alumni Society Annual Meeting
- January 31 –Pride and Prejudice Wine Tasting and Play
- February 7 – Wright State vs. Cleveland State Men’s basketball tailgate and game
- February 12 – Raider Round up SAA and Student Government event
- February 28 – Alumni Leaders Conference
- February 28 – College Outstanding Alumni Awards
- February 28 – Rowdy Gras

Wright State University Foundation Report November 2014

During the first quarter of the new fiscal year, volatility returned to the investment markets bringing mixed results to the Foundation's financial operations. Our endowment portfolio lost 0.6%, as we suffered losses in two of the months of the quarter. On a relative basis, the portfolio outperformed its associated composite benchmark by 46 basis points. At September 30th, the portfolio's three- and five-year returns exceeded our policy target return and the five-year return was 85 basis points above the benchmark. As shown below, the endowment portfolio ended the quarter with a value of \$80.3 million, down \$0.2 million since the beginning of the year. Both equities and fixed income performed in the red. Domestic large cap equities provided a slightly positive return during the quarter, but domestic small cap and global equities dragged the asset class into negative territory. Our alternative investments all experienced gains for the quarter, with our Special Situations hedge fund of funds providing the strongest return at 2.15%. Overall, the alternative classes added 1.65% to the portfolio return.

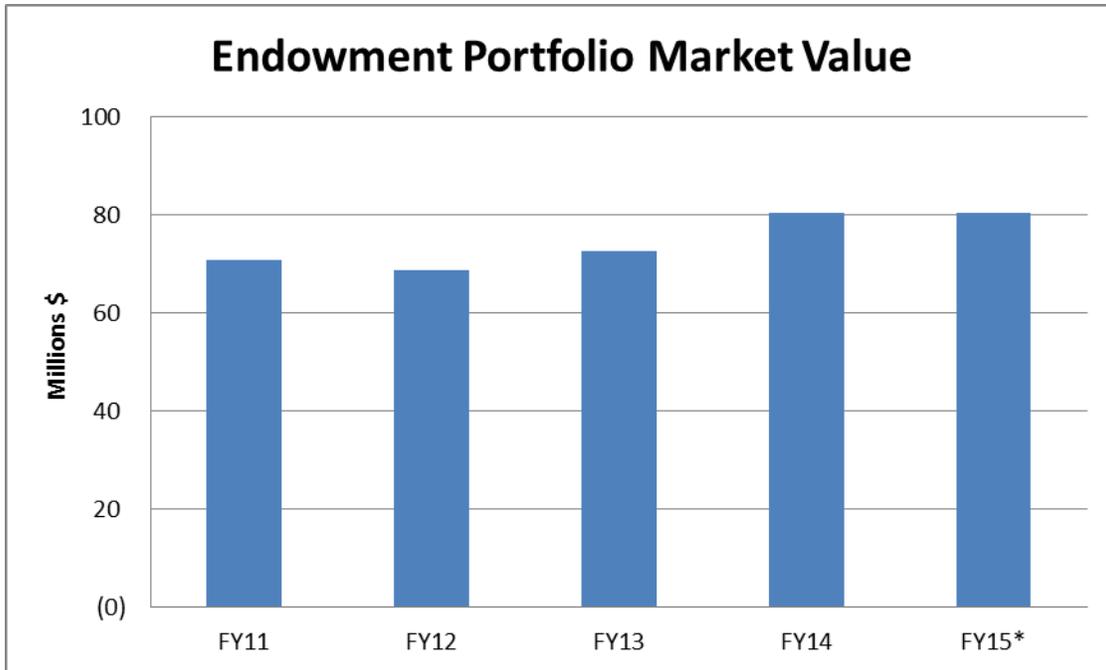
In contrast to investment earnings, contribution revenue was up sharply in the first quarter. The Foundation raised \$1.3 million dollars, an increase of more than 133% over the same period last year. Increased donation activity related to the upcoming public launch of the University's comprehensive campaign entitled *Rise. Shine.* The Foundation has generated over \$100 million in contributions towards the campaign goal of \$150 million and activity will likely continue to increase as we approach the campaign deadline in the summer of 2016. Since the beginning of the fiscal year, the Foundation's total assets have fallen in value to \$132.0 million, a decline of 2.0%

The Foundation's current endowment target allocation, actual allocation and market values as of September 30, 2014, are presented below:

Endowment Portfolio Composition

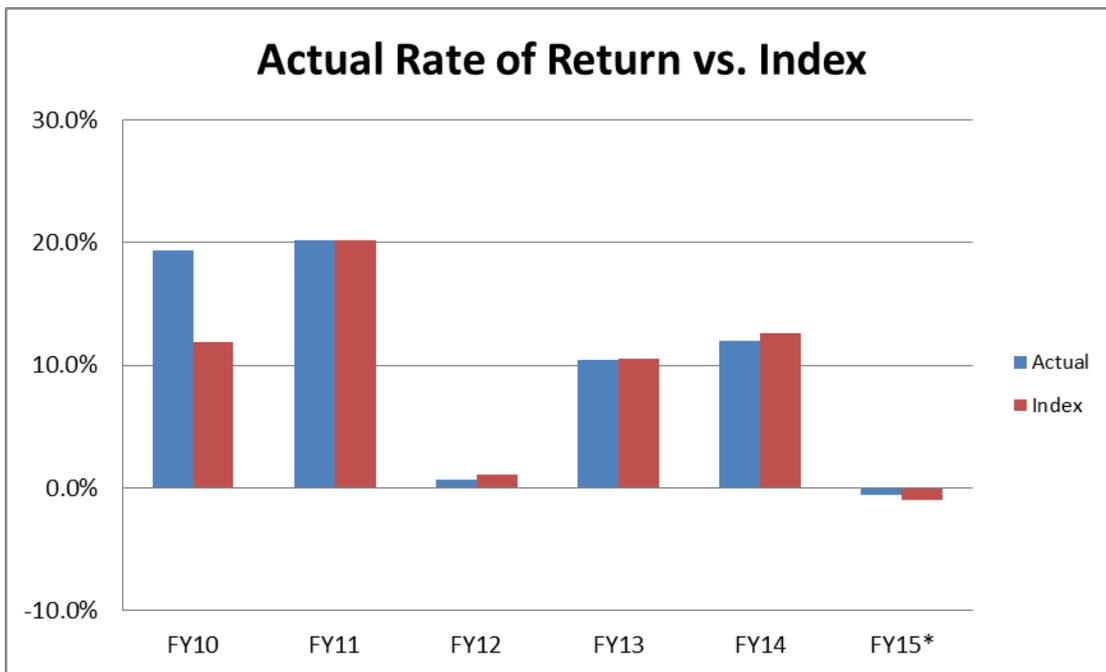
Asset Class	Target Allocation	Actual Allocation	Market Value September 30, 2014
Equity	43%	50%	\$40,410,983
Fixed income	32%	30%	24,315,267
Hedge funds	14%	13%	10,176,169
Private equity	8%	3%	2,638,037
Structured credit	3%	4%	2,798,007
Cash & equivalents	0%	0%	-0-
Totals	100%	100%	\$80,338,463

Endowment Value



*To September 30, 2014

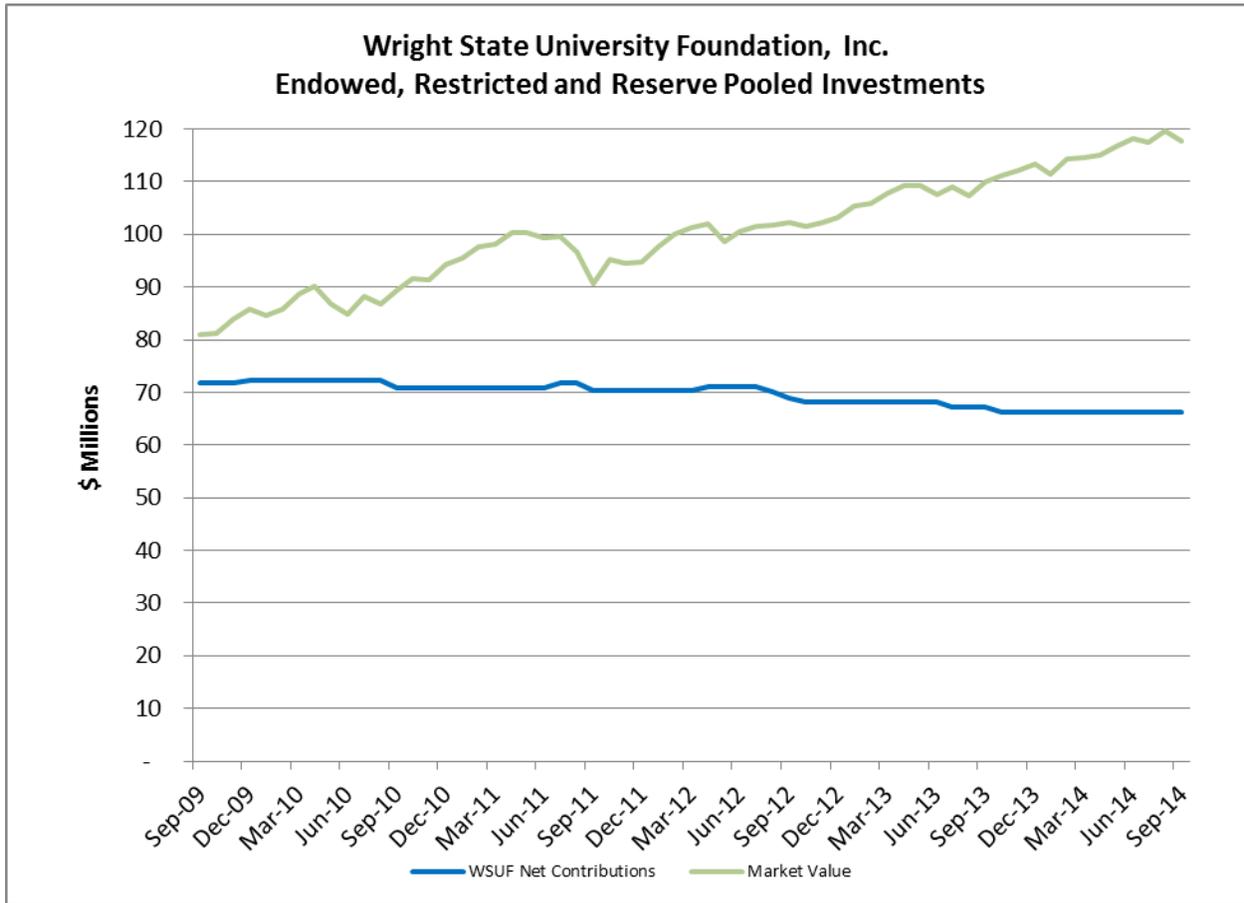
Endowment Historical Rates of Return



*To September 30, 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 October 31, 2014 and 2013

MONTH-TO-DATE

GIFT SOURCE	OCT 2014		OCT 2013		PCT. CHANGE	
	DONORS	DOLLARS	DONORS	DOLLARS	DONORS	DOLLARS
Alumni	743	\$63,219	788	\$86,498	-6%	-27%
Corporations	37	371,148	39	115,959	-5%	220%
Foundations and Organizations	16	40,443	12	301,595	33%	-87%
Friends	768	111,654	660	338,384	16%	-67%
SUBTOTAL CASH RECEIPTS	1,564	\$586,464	1,499	\$842,436	4%	-30%
Gifts-in-kind	6	84,740	5	43,594	20%	94%
TOTAL ALL RECEIPTS	1,570	\$671,204	1,504	\$886,030	4%	-24%

FISCAL-YEAR-TO-DATE

GIFT SOURCE	FY2015		FY2014		PCT. CHANGE	
	DONORS	DOLLARS	DONORS	DOLLARS	DONORS	DOLLARS
Alumni	1,260	\$216,420	1,463	\$253,543	-14%	-15%
Corporations	90	1,246,826	110	809,194	-18%	54%
Foundations and Organizations	37	222,569	35	513,609	6%	-57%
Friends	1,192	305,628	1,282	560,067	-7%	-45%
SUBTOTAL CASH RECEIPTS	2,579	\$1,991,443	2,890	\$2,136,413	-11%	-7%
Gifts-in-kind	22	120,622	12	122,754	83%	-2%
TOTAL ALL RECEIPTS	2,601	\$2,112,065	2,902	\$2,259,167	-10%	-7%

WRIGHT STATE UNIVERSITY FOUNDATION, INC.
Report of Fundraising Totals By Source and Unit
Fiscal Year-to-Date to October 31, 2014
(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	\$123,384	\$117,734	\$1,000,000	\$454	\$130,000	\$1,371,572	\$925,523
Corporations	796,490	480,000	0	74,657	0	1,351,147	349,245
Foundations and Organizations	222,569	70,000	0	95	0	292,664	503,359
Friends	211,947	53,629	0	45,416	175,000	485,992	773,362
CURRENT FYTD TOTALS	\$1,354,390	\$721,363	\$1,000,000	\$120,622	\$305,000	\$3,501,375	
PRIOR FYTD TOTALS	\$1,338,835	\$349,122	\$50,000	\$122,754	\$690,778		\$2,551,489
% CHANGE FROM PRIOR FISCAL YEAR	1.2%	106.6%	1900.0%	-1.7%	-55.8%	37.2%	

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	\$228,576	\$523,050	\$0	\$0	\$0	\$751,626	\$387,022
College of Education & Human Services	10,491	11,132	0	0	0	21,623	80,977
College of Engineering & Computer Science	44,287	4,401	0	0	0	48,688	135,820
College of Liberal Arts	86,790	64,808	0	13,659	190,000	355,257	342,988
College of Nursing & Health	384,540	3,440	0	0	0	387,980	321,070
College of Science & Math	14,005	6,895	0	0	0	20,900	36,879
Curriculum & Instruction	5,792	695	0	12,075	0	18,562	9,358
Enrollment Management	12,797	22,440	0	0	0	35,237	16,597
Intercollegiate Athletics	85,756	8,320	0	0	0	94,076	424,835
Lake Campus	22,196	1,455	0	18,000	0	41,651	17,510
Other	375,803	50,900	1,000,000	40,735	65,000	1,532,438	601,545
Raj Soin College of Business	59,900	16,887	0	0	0	76,787	52,008
School of Professional Psychology	5,100	390	0	0	0	5,490	3,415
Student Affairs	15,007	250	0	4,332	50,000	69,589	97,612
University College	530	0	0	0	0	530	50
University Libraries	2,820	6,300	0	31,821	0	40,941	23,803
CURRENT FYTD TOTALS	\$1,354,390	\$721,363	\$1,000,000	\$120,622	\$305,000	\$3,501,375	
PRIOR FYTD TOTALS	\$1,338,835	\$349,122	\$50,000	\$122,754	\$690,778		\$2,551,489
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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.

Development Report

November 2014

Planned Giving Update

We secured 7 new planned gifts as of 10/31/14 for a projected gift value of \$1,305,375.

An additional 6 planned gifts are in discussion with an estimated projected value of \$4,200,000. There are 27 more potential planned gifts that are in early stage discussions.

A comprehensive planned giving marketing brochure emphasizing the Rise. Shine. campaign is being mailed to 20,000 households. This is a special mailing as it highlights all the gift opportunities available to prospective donors considering a planned gift to Wright State University.

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

The seven-week Fall Phonathon campaign began on September 6 and concluded on Thursday, October 23. A staff of 55 student callers raised \$152,152, from 1,960 contributors. During this campaign, retirees were called for the first time. WSU had two retirees provide an anonymous challenge to encourage retiree giving. \$12,110 was raised from 87 retirees, which increased their CSIC participation to 17%.

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 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 branded with the Campaign's *Rise. Shine.* markings.

New initiatives included:

- Suggested giving amounts
- Encouraged donors to jump up to the next giving society
- We included the Wright State University Alumni Association scholarship appeal

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. Better use of social media and leveraging the concept of crowdfunding are broad directions that we think we need to move toward. 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 for Student Giving will take place on #GivingTuesday, December 2, 2014. #GivingTuesday is a global day dedicated to giving back. On that date charities, families, business, community centers, and students around the world will come together for one common purpose: to celebrate generosity and to give. The #GivingTuesday objective at Wright State is to build awareness and philanthropic education for our students.

Day of Giving Campaign

The Alumni Association is utilizing MySuperMarketer (MSM), their social media contractor for Facebook, to conduct a Day of Giving Campaign to take place on #GivingTuesday. Wright State Giving's social media platforms will also collaborate with the Alumni Association by sharing the messages delivered by MSM. This day of giving campaign is a great companion to the on campus event for students.

Campaign Purposes:

The Rise. Shine. Campaign includes gift support of the real essence of our great university. They are as follows:

Individuals—*the dedicated people of Wright State University—students and faculty.*

Gifts within this category support scholarships, undergraduate, graduate and faculty research, endowed chairs, and professorships, salary funds, and student support in all forms.

Environments—*the places where learning and teaching take place.*

Gifts within this category support our physical spaces such as the Student Success Center Building, the Creative Arts Center Modernization and Expansion, the Neuroscience Engineering Collaboration Building, classrooms, laboratories, study pods and studios, athletic facilities, green spaces, equipment and software.

Innovations—*the programs, centers and outreach that touch our community.*

Gifts in this area include programmatic funds, community outreach, lectures, student competitions, events, experiential learning, and multicultural affairs.

Campaign Points of Pride

- Gifts from alumni to the campaign comprise nearly 20% of the total. This is an outstanding level of alumni participation!
- Ten alumni who made gifts in excess of \$1 million each were announced at the campaign public launch event. In the first campaign, there was one alumna who made a \$1+ million gift.
- Ten friends also made million plus commitments to the Rise. Shine. Campaign and were proudly announced at the campaign event.
- Fifteen corporations and foundations made million plus commitments to the Rise. Shine. Campaign and their gifts were announced at the campaign launch.