

**WRIGHT STATE UNIVERSITY
BOARD OF TRUSTEES**

**Advancement Committee Report
January 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 January 2019

Updates:

Alumni Association Strategic Plan

The Wright State Alumni Association has officially begun the process to develop and implement its strategic plan for the next three 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. Harry was a 20+ year marketing and general management executive at Procter & Gamble, and for the past 17 years has worked with a wide variety of for-profit and non-profit organizations seeking to develop clearer and more focused strategic plans. He has also served on and led a number of non-profit boards. His spouse, Julia Hawgood, is a 1985 Psy.D. graduate of WSU's School of Professional Psychology

A strategic assessment has been sent and completed by all board members and will be reviewed by the full board at the next Alumni Association Board meeting on February 2nd. A Strategic Planning Committee has been formed and will begin meeting in February to develop the plan, based on the initial findings in the assessment, plus further discussion. The plan will be reviewed at the May 4, 2019 Board meeting and voted on at the following 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

UPCOMING EVENTS:

Thursday, February 7: Wine Tasting at Cooper's Hawk Winery (Liberty Center)

Friday, February 15: Murder Mystery Dinner Train (Ft. Myers, FL)

Saturday, March 2: Rowdy Gras

Friday, April 5: Amigos Latinx Gala

Saturday, May 18: Wine Trail Tour (overnight)

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: 43rd Annual Alumni Association Legacy Scholarship Golf Outing

Saturday, August 3: Alumni College

Saturday, September 14: 9th 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
January 2019

The financial markets turned volatile in October and partially rebounded in November. As a result, the value of the Foundation’s endowment portfolio declined 3.1% for the two-month period, wiping out all market appreciation for the fiscal year. As indicated below, our endowment portfolio finished the month with a market value of \$84.7 million, slightly less than its value on July 1, 2018. The portfolio’s return entered negative territory during October and by the end of November stood at -0.87% for the year. This negative return rate was further exacerbated by its underperformance of its associated composite benchmark of -0.55%. The overall portfolio loss was spurred by losses in the equity markets, especially in the world equity (ex-US) space. Those securities have lost over 8% of their value since the beginning of the fiscal year. US equities and global equities (including US stocks) have maintained slightly positive returns for the year at 2.12% and 2.58%, respectively. However, domestic small cap stocks have lost nearly 5% in value. Fixed income returns have been flat thus far, although opportunistic income securities have performed positively (+1.06%). Gains in those securities were offset by losses in the emerging markets debt space (-2.01%). Earnings from our alternative investments (excluding private equity) returned 1.51% for the first five months of FY19, with our hedge fund investments leading the way with a +2.84% return. Our energy debt investment has lost 0.74% for the year. At November 30, 2018, the portfolio’s one-, three-, five-, and ten-year returns were -0.22%, 6.20%, 4.46%, and 8.73%, respectively. Asset allocations at the end of November were in line with our investment policy, with actual allocations as follows: 43% equities, 24% fixed income, 13% multi-asset, and 20% alternatives.

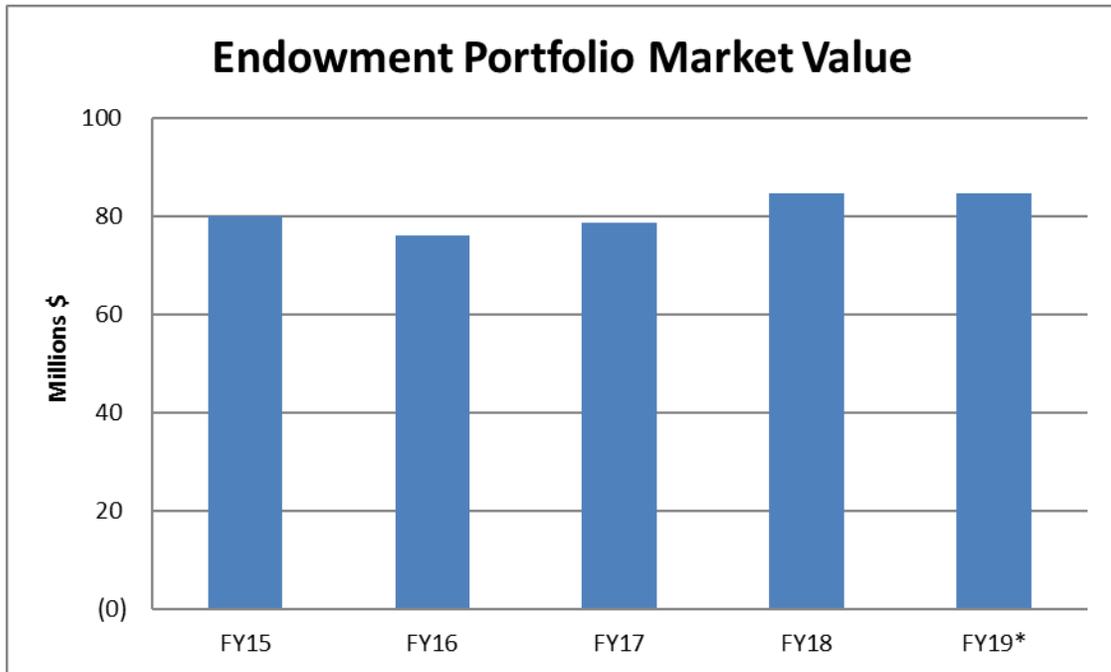
As predicted in the last report, investment declines in October and failure of the markets to recover in November resulted in a decline in the Foundation’s gross reserve. The gross reserve was \$8.5 million on November 30th, a 1.7% decline for the year and a nearly 16% decline since the end of the previous quarter.

The Foundation’s current endowment portfolio composition, including target allocations, actual allocations, and market values, as of November 30, 2018, is presented below:

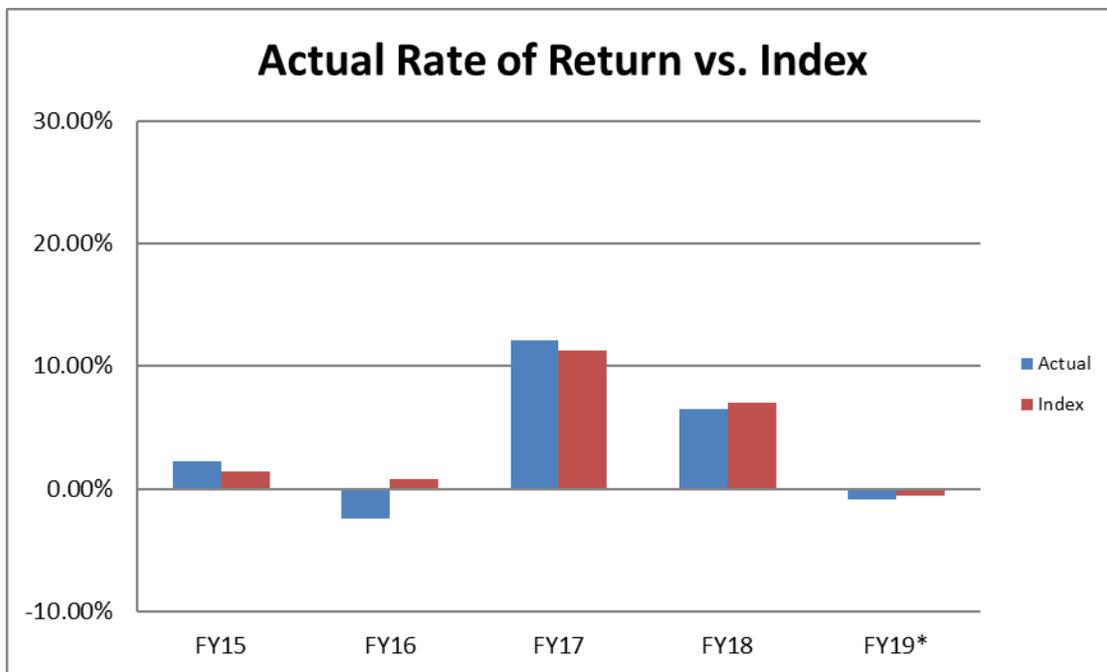
Endowment Portfolio Composition

<u>Asset Class</u>	<u>Target Allocation</u>	<u>Actual Allocation</u>	<u>Market Value November 30, 2018</u>
Equity	42%	43%	\$36,539,075
Fixed income	24%	24%	20,060,364
Multi-asset	14%	13%	11,379,165
Hedge funds	8%	8%	6,919,891
Private equity	8%	7%	5,891,766
Energy Debt	4%	5%	3,951,800
Cash & equivalents	0%	0%	0
Totals	100%	100%	\$84,742,061

Endowment Value



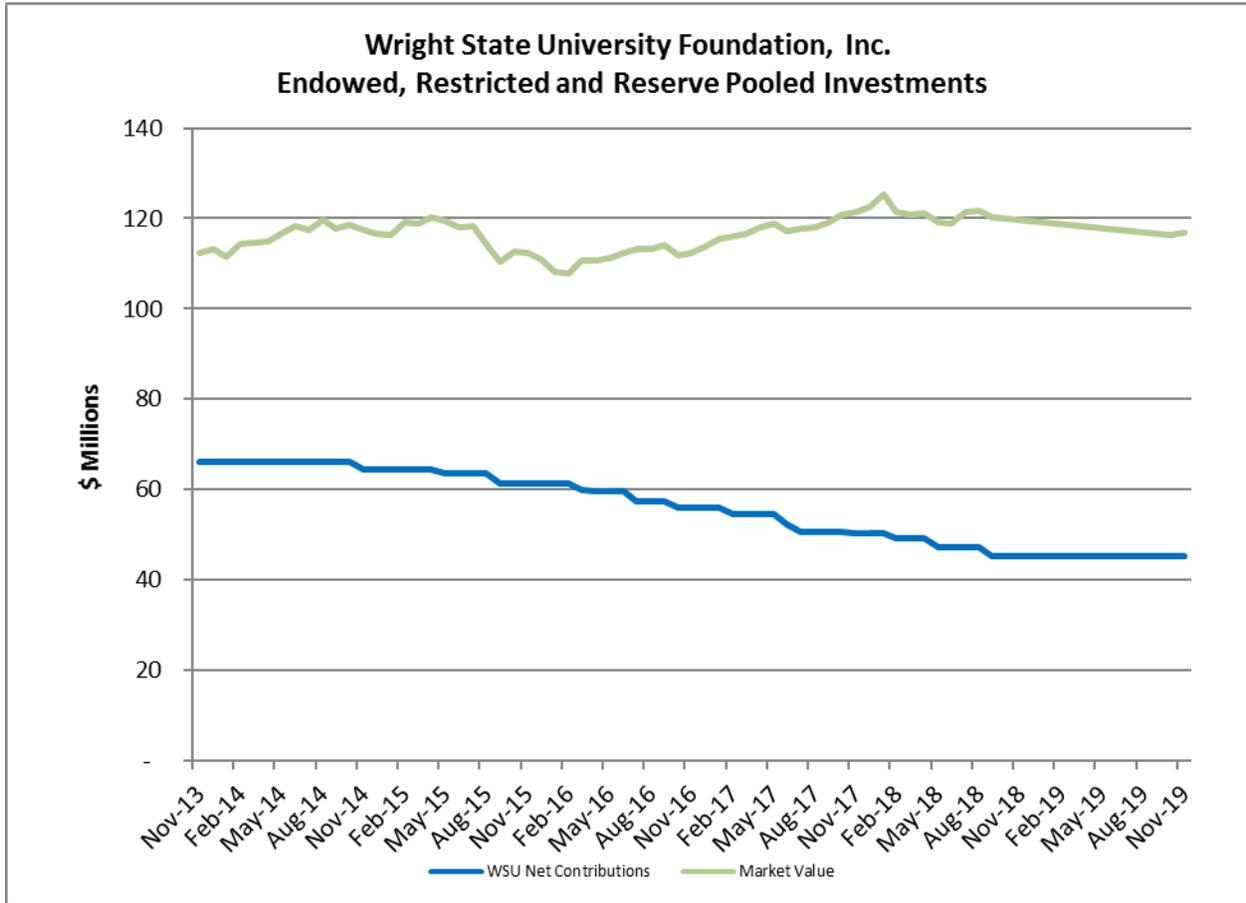
Endowment Historical Rates of Return



* Through November 30, 2018

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).

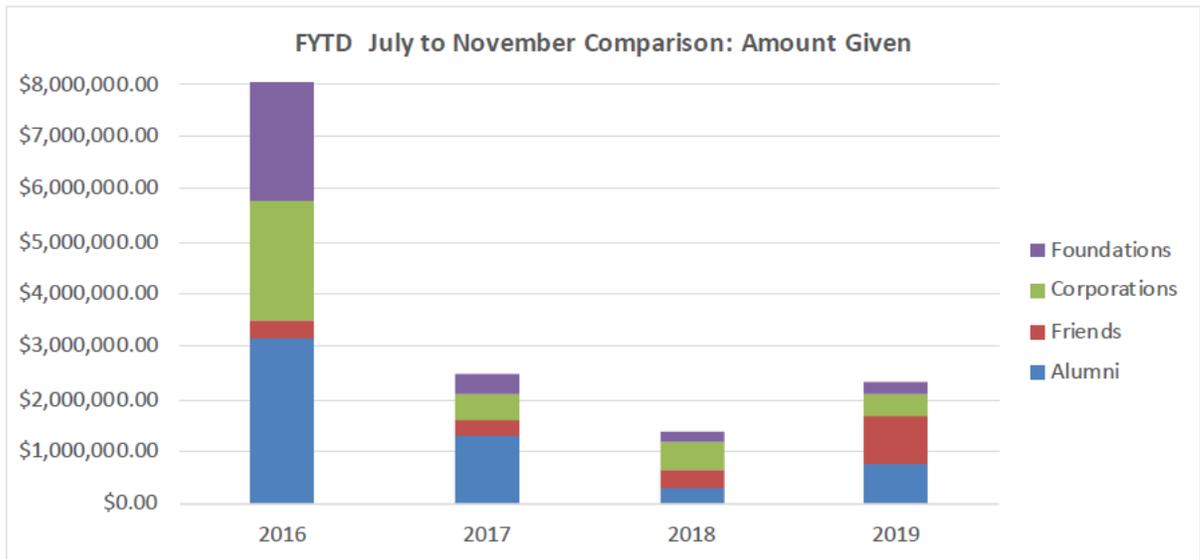
All Portfolios Value vs. Contributions





**Commitments per Fiscal Year by Source: Dollars FYTD Comparison
July 1, 2015 - November 30, 2018**

FY July to November	Alumni	Friends	Corporations	Foundations	Grand Total
2016	\$3,160,741.37	\$332,422.88	\$2,287,539.33	\$2,861,312.38	\$8,642,015.96
2017	\$1,310,545.68	\$278,515.78	\$518,804.74	\$362,922.23	\$2,470,788.43
2018	\$310,701.71	\$347,899.54	\$522,704.10	\$184,530.45	\$1,365,835.80
2019	\$761,815.27	\$909,751.94	\$411,918.03	\$230,655.64	\$2,314,140.88



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 - November 30, 2018

Area/Program	2016	2017	2018	2019
Athletics	\$1,625,373.23	\$466,954.02	\$548,935.74	\$249,012.11
Colleges and Schools	\$19,344,466.46	\$6,408,952.95	\$4,853,902.49	\$1,424,328.14
CECS	\$2,688,041.12	\$1,031,049.08	\$1,475,699.33	\$79,939.25
CEHS	\$91,686.41	\$111,219.63	\$66,036.88	\$27,879.74
COLA	\$990,897.46	\$775,600.57	\$919,534.89	\$682,385.62
CONH	\$571,485.30	\$1,554,858.89	\$214,074.03	\$229,110.00
COSM	\$10,920,654.39	\$564,120.26	\$163,770.91	\$57,410.00
LAKE	\$1,307,467.92	\$260,859.92	\$227,020.00	\$5,882.32
RSCB	\$494,847.31	\$810,319.59	\$268,255.20	\$99,994.00
BSOM	\$2,136,516.55	\$1,183,717.01	\$1,483,914.33	\$230,127.21
SOPP	\$142,870.00	\$117,208.00	\$35,596.92	\$11,600.00
University Libraries	\$93,412.03	\$67,262.19	\$287,080.63	\$300,964.38
University Wide	\$5,096,013.16	\$1,991,237.48	\$1,485,839.79	\$339,836.25
Grand Total	\$26,159,264.88	\$8,934,406.64	\$7,175,758.65	\$2,314,140.88

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

WRIGHT STATE UNIVERSITY FOUNDATION, INC.

**Report of Total Receipts: Cash and Gifts-in-Kind
For the Month Ended November 30, 2018 and 2017**

MONTH-TO-DATE

GIFT SOURCE	NOV 2018		NOV 2017		PCT. CHANGE	
	DONORS	DOLLARS	DONORS	DOLLARS	DONORS	DOLLARS
Alumni	413	\$136,757	393	\$73,167	5%	87%
Corporations	41	290,567	28	42,121	46%	590%
Foundations and Organizations	16	350,924	13	740,526	23%	-53%
Friends	360	58,421	388	67,993	-7%	-14%
SUBTOTAL CASH RECEIPTS	830	\$836,669	822	\$923,807	1%	-9%
Gifts-in-kind	1	21	5	523	-80%	-96%
TOTAL ALL RECEIPTS	831	\$836,690	827	\$924,330	0%	-9%

FISCAL-YEAR-TO-DATE

GIFT SOURCE	FY2019		FY2018		PCT. CHANGE	
	DONORS	DOLLARS	DONORS	DOLLARS	DONORS	DOLLARS
Alumni	1,144	\$368,502	1,150	\$325,923	-1%	13%
Corporations	121	963,595	126	872,375	-4%	10%
Foundations and Organizations	34	517,136	43	916,697	-21%	-44%
Friends	781	370,046	896	359,462	-13%	3%
SUBTOTAL CASH RECEIPTS	2,080	\$2,219,279	2,215	\$2,474,457	-6%	-10%
Gifts-in-kind	7	44,397	15	29,117	-53%	52%
TOTAL ALL RECEIPTS	2,087	\$2,263,676	2,230	\$2,503,574	-6%	-10%

**Advancement Committee Report
Development Report
January 2019**

Planned Giving Update

FY2019 Planned Gift Report:

- Seven planned gift commitments with a stated gift value of \$3,405,000 have been recorded thus far in FY19.
- Four planned gifts distributions from realized estates have been received during this fiscal year. The combined total of these estate distributions total \$82,695. We anticipate another distribution to be made from one of these estates with an additional expected value of \$70,000.
- We also have distributions pending from seven other estates at some point in time as these estates are liquidated. The total of these six estates is anticipated to be over \$4,300,000.
- There are currently eight additional planned gifts in discussion with an estimated projected value exceeding \$10,400,000. We also have forty potential planned gifts in the early stage of discussion.
- We continue to market the planned giving program through a variety of means including face-to-face discussions, a monthly e-newsletter that goes out each month to over 20,000 individuals, bi-annual promotional mailing, and an e-blast. Our January e-newsletter focused on wills and trusts and received above average interest from potential donors seeking information to help them set up a will or trust.

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

30 day results FY19	\$39,825	201 gifts
30 day results FY18	\$31,819	272 gifts
30 day results FY17	\$36,560	248 gifts
30 day results FY16	\$24,147	220 gifts

#GivingTuesday – Tuesday, November 27th

GivingTuesday is a global day of giving fueled by the power of social media and a collaboration that started in 2012. Wright State participated for the sixth year in a row in 2018.

A collaboration between the Wright State Foundation Offices of Alumni Relations and Annual Giving to promote philanthropy at Wright State. This year, our campaign focused on three Raise Wright Crowdfunding projects and the Boonshoft School of Medicine day of giving. BSOM participated 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 27th.

#GivingTuesday Results

2018 (CY)	\$11,634, 115 donors
2017 (CY)	\$11,465, 86 donors
2016 (CY)	\$10,717, 129 donors
2015 (CY)	\$7,800, 75 donors

2018 CSIC – Campus Scholarship and Innovation Campaign

2018 CSIC results will be calculated through December 31, 2018. Results are pending.

Advancement Committee Report
Discover Your Story: Archives Campaign Report
January 2019

Project Update:

- The Archives Team is working with Facilities on a new phased-in approach to the project so that the collections will begin to be moved to 2455 Presidential Drive in stages as funding permits.
- The Archives staff is planning for a partial move in the summer of 2019.
- The relocation will move the collections currently housed on the fourth floor of the Dunbar Library to the first floor of 2455 Presidential Drive.

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. Most recently, we received a major gift from the Kettering Fund. We've submitted additional proposals that are currently being evaluated by local foundations and are preparing to make a major national ask.

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 nearly \$875,000 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.