ETSU Annual Giving Operating Plan 2021-22 July 21, 2021

Executive Summary

This document establishes the plan and schedule for annual giving activities at East Tennessee State University. University Advancement developed this plan with the cooperation of the academic units.

Annual Giving Vision, Mission, Values, and Goals:

Vision – the Annual Giving Office will build and sustain a significant base of supporters, ensuring a continuing source of annual, expendable, and unrestricted funding for the University.



Annual Giving Goals:

- 1. Develop, Document, and Communicate Consistent Practices:
 - a. Benchmark with colleagues and aspirational peers
 - b. Review/document procedures
 - c. Develop methods to analyze data and target specific opportunities
- 2. Increase Annual Giving to \$2.5M by 2026 (FY22 goal is to raise ~\$2M)
- 3. Increase Donor Participation:
 - a. Analyze historical data and patterns
 - b. Segment donor populations to prioritize and maximize effectiveness
 - c. Reach out to constituents on a regular basis to build giving habits and provide stewardship
 - d. Develop themed giving communities to promote passion, belonging, and teamwork
 - e. Plan and conduct ETSU Day of Giving (DoG), including a faculty and staff giving campaign
 - f. Start to include students in Day of Giving
- 4. Improve the awareness/importance of student philanthropy and heighten the visibility of Annual Giving among students (Gold Cord Circle; Leadership Annual Giving).
- 5. Increase Social Media activities continue to enhance Facebook, Instagram, and Twitter activity.

Plans and Activities

Unit-Specific Solicitation Activities:

- **Major Gift Officers** annual giving will work closely with all advancement officers to ensure the close collaboration needed to provide consistent solicitations to prospects.
- **Targeted Direct Mail and E-mail Appeals** we will prepare and send one direct mail letter per year per schedule in Appendix 1, targeted to alumni of each major ETSU unit, with follow-up via e-mail.
 - In the case of alumni who have more than one degree (which is true for a large number of our alumni), they will receive a mailing from the unit they have chosen to be their "preferred."
 Lacking a preferred unit, they will receive the mailing from which they graduated first.
 - Letters are prepared to be generally consistent with other annual fund letters for that fiscal year, but customized to include content, branding, and/or signatures from the unit in particular.
 - Letters will include a customized reply slip recommending designations specific to the unit.
 - For Graduate and Continuing Studies, Honors College, Libraries, Roan Scholars, Student Life & Enrollment, and other units as determined, Annual Giving will work closely with Advancement Services and assigned directors of development to establish and maintain constituent lists. These lists may include past donors of the unit/program, past student interns, past employees, those with a personal passion, and others. Annual Giving will use these constituent lists to solicit annually on behalf of these programs in spring of each year (see Appendix 1).
 - Annual Giving will prepare and distribute a letter for Gatton College of Pharmacy in July of each year and will work with Library, Honors, and SLE on letters each spring.
 - Unit heads will approve letters and Annual Giving will distribute as shown in Appendix 1.
 - Units may send direct emails to constituents using software solutions they may have access to.
 Units without access to a current email marketing program can contact Annual Giving or Alumni Association to get access to Anthology/Encompass (formerly called iModules).
- Phonathon after a two-year "pause" (2018 2020) the ETSU Phonathon was eliminated. While a systematic phonathon program will not take place, Annual Giving may call or otherwise communicate with households who have consistently given via the phone channel in past years. The College of Medicine Phonathon will "pause" for 2021-22 and the future is TBD. If it continues, Annual Giving will provide support for credit card acceptance and pledge follow-up.

Central Activities:

- End-of-Year Message and Calendar one letter per year, mailed around the first part of December, targeting all donors of the past ~six years. This letter/calendar stewards loyal donors and serves as a reminder to make tax-deductible contributions before the end of the year. Letter will include content regarding current events on campus, but will not be customized by unit. Letter will include a pocket calendar, reply slip, and link to online giving. Annual Giving provides about 500 copies of the calendars to the National Alumni Association.
- **Events** we will attend select events to help attendees better understand philanthropy in general, and the purpose of the Annual Fund, in specific. In addition, we want students to understand there is a gap between the amount paid for tuition and the total cost of higher education. Examples of student events include community showcase, graduation celebration, graduation rehearsals, etc.
- Day of Giving:
 - Fall we will continue to participate in GivingTuesday (1st Tuesday after Thanksgiving), but we
 will do so primarily as a means of saying thank you to our donors. Annual Giving will manage
 this program with the advice and guidance of unit directors of development.
 - Spring we will plan a separate giving day (around mid-April each year). This will include solicitation activities and will emphasize a faculty/staff/retiree campaign, student philanthropy,

- and outreach to partners and friends. Starting in 2022, we will begin to solicit students. Annual Giving will form a cross-campus committee (to include representatives from units) to plan and conduct giving day activities and to recruit ETSU advocates to help spread the word.
- Simple Simon Appeal once per year, mailed to coincide with Day of Giving, targeting non-recent giver alumni. Work to track recipients of past appears and draw down the number of solicitations sent to non-donors.
- Website, and Social Media Annual Giving will prepare content for use on our own website and in social media and other similar media channels. Content will always include an invitation to engage and/or to give. Stories will be from the general viewpoint of ETSU and won't be customized by unit, although we may use examples of students, programs, or curriculum. Stories will always include the link to online giving and Annual Giving contact info.
- Pledge Confirmation/Reminders Annual Giving will follow up on pledges made through the College of Medicine Phonathon, through personal calls to phone givers, and through WETS-FM drives. Reminder process will be:
 - Pledge Confirmation Letter sent approximately 2 weeks from date pledge is made
 - o Reminder 1 sent ~60 days after the date of the original pledge
 - Reminder 2 (e-mail) sent ~90 days after the date of the original pledge, if not already paid
 - Reminder 3 sent ~120 days after the date of the original pledge, if not already paid.
 - Approximately 150 days after the date of the original pledge, outstanding pledges will be marked as unhonored.
- Failed Credit Cards we follow up on failed transactions whether one-time or recurring. Work with Foundation Accounting (for TouchNet), WETS-FM, iModules, and donors to get accepted transactions for all credit card gifts.
- **No-contact Confirmation** once per year, Annual Giving will reach out to alumni and friends who have indicated more than 5 years previous, they do not want to be solicited. The letter will provide updated information regarding ETSU and ask them to either renew or retract their request that we not contact them.
- Last Year but Unfortunately Not This (LYBUNT) Letters the December edition of this letter will be combined with the Pocket Calendar mailing and will include a reminder of the upcoming deadline to make tax-deductible donations. Throughout the year, we will send Anniversary Cards to donors one year from the date of their last gift. We'll also send a combined LYBUNT mailing in June of each year. See Appendix 4. We are working to transition the anniversary cards to renewal letters. Annual Giving will keep the AVP for Advancement and DoDs in the loop on these communications, to include sending them a list of the current LYBUNTs. Major Gift Officers may reach out personally (in person or by phone, letters, or e-mail) in an effort to remind people to give. Appendix 4 includes information DoDs can use to contact constituents.
- President's Circle Solicitations & Reminders Annual Giving will reach out periodically to remind President's Circle members of the commitment to donate \$500 per fiscal year. Refer to the President's Circle Policy. PC members will also receive a special Day of Giving letter.
- Scholarship Funding we will monitor unspent scholarship funding. Specifically, we will work with DoDs to ensure award criteria/documentation is appropriate and that funds are being awarded. When we identify endowments needing modification, the unit DoD will take the lead role to do so, contacting the donor as appropriate.
- Matching Giving Annual Giving will promote, monitor, and help administer the corporate matching giving program.
 - Links and information will be added to all communications, including the acknowledgement people receive when they make a gift online.

- We have subscribed to the HEP Matching Giving database and have incorporated the link in our website and into our online giving form.
- We are working to proactively remind annual gift donors to prepare/send matching forms after they donate.
- **Leadership Annual Giving** we are developing a program focusing on consistent givers, encouraging them to aspire to major gift-level support. We will work closely with advancement officers to ensure consistency and to make sure we don't duplicate efforts.

- Reply Slips:

- We will review reply slips and other reply devices annually, the results of which will be published in this document (see examples in Appendix 3).
- Solicitations on behalf of each College/Unit will include the designations they request (must be active Foundation accounts) PLUS Top University Priorities, Alumni Legacy Scholarships, Martin Center for the Arts, and Other, with a line to write in the designation.
- University-wide solicitations (pocket calendars, Day of Giving, President's Circle, etc.) will include the list shown in Appendix 3, Example B.

Stewardship Activities:

- Thank You Notes from Students placed in the envelope with the gift acknowledgement to <u>all</u> donors, except WETS-FM, Athletics, and Quillen College of Medicine.
- Giving Levels, Clubs, and Societies these are still under development, but will be utilized to help
 encourage donors to renew and to "move" to higher levels of giving. Refer to the figure below for
 general giving levels.
 - O First-time Donors because donors are difficult to engage and because they are more likely to give next year if they gave this year.

 Annual Gifts

 Leadership Annual Gifts

 Major Gifts

 Major Gifts

 \$10,000
 \$10,000
 - Consecutive Year Donors annual recognition for people who donate for 5 years or more consecutively.
 - Gap or Returning Donors annual recognition for people who have donated again after not donating for 3 years or more.
 - Graduation to Higher Giving Levels –a process to provide recognition for people who have attained one or more giving levels.
- Tax Statements no later than January 31 of each year, **Advancement Services** will provide recurring givers (credit card, EFT, payroll, and those sending monthly checks [bill pay]) with a summary of their donations for the year. This summary will give the total amount donated through all means.
- Endowment Reports Annual Giving will prepare reports for endowments, providing financial status of accounts. Reports, (completed ~early November of each year), will be delivered to donors, with courtesy copy to DoDs so they can perform outreach, as necessary.
- Holidays Annual Giving will periodically recognize holidays and other events that may tie in with giving activities. Recognition may take place via electronic means or through cards/letters/calls.

Calendar of Activities – see Appendix 1

Themes and Branding

- The Annual Giving portfolio is referred to generally as the ETSU Annual Fund. All materials generated will be similarly branded, including ETSU and/or college markings, as appropriate. Content will be developed to convey a consistent message/theme. Specifically, it will reflect our

- efforts to sustain ETSU and that even though this is an "annual" fund, the nature of our work is perpetual and continuing, without regard to specific campaign objectives.
- All print communications will be coordinated with University Relations.
- See Appendix 2 for a sample solicitation.

Evaluation and Reporting

The Annual Giving Office will review this plan each year, make updates, recommend changes, and solicit feedback from all Advancement staff. DoDs should share with their deans and/or department heads. We will post the final plan, including the communications calendar, to the Policies section of our website. To evaluate effectiveness of our programs, we use the metrics and process shown in the Annual Fund Metrics Pyramid (below).



Appendix 1 – Calendar of Annual Fund Activities

ETSU Annual Giving Activity Calendar

	Direct-Mail	E-Mails	Day of Giving	Social	Events/Other
			24,000		
July, 2021	Prepare Draft Annual Ltr Coordinate with Units President's Circle Pharmacy Ltr (1.4K)				
August, 2021				Welcome Back	25 - Community Showcase
September, 2021	7 - Alum Donors (16K) 15 - Alumni Couples (2.7K) 21 - Friend Donors (3K)	21 - Donors		Student Features	TBD-PreviewEXPO
October, 2021	1 - QCOM Ltr (4K)	Cords		Student Features Tailgates & Fball	Grad. Celeb. CANX
November, 2021	15 - Pocket Cal (11K)	Cords 30 - Giving Tues		6 - Homecoming Thanksgiving	6 - Homecoming
December, 2021	5 - Holiday Cards (1.5K)	Cords 15 - Holiday	ID Volunteers & Unit Champions Committee Mtg	GivingTuesday EOCY Giving Holidays	10 - Grad. Rehearsal
January, 2022	New Donor Letter (1000) President's Circle (500)	Football Schedule	Unit Toolkits Committee Mtg	Welcome Back Spring Semester	
February, 2022	5 - Val. Cards (4,700) 15 - SLE (2.5K), Honors (1.4K), and Lib (1.25K)		Advance Mssging Committee Mtg Promo Items	Student Features Holidays	
March, 2022	2 - DoG Pre (11K) 5 - Alumni Non-Donors (67.2K) 15 - Class of 72 (1K)	Cords DoG	Advance Mssging Committee Mtg	DoG Info Video	TBD - Grad. Celeb.
April, 2022	Frd/Ptnr Non-donors (4.3K); TBD - Day of Giving (see DoG Schedule)	DoG Cords	Committee Mtg Day of Giving	Faculty/Staff Retiree Posts Student Giving	
May, 2022	Unsubs	Cords	Stewardship TY to Volunteers	Graduation Student Giving	6th - Grad Rehearsal
June, 2022	LYBUNTs and Lapsed Donors (3,500) \$1K+ LYBUNTS (~200) Upgrades and 2nd Asks	Final Push	Lessons Learned Committee Mtg	EOFY Giving	

Thank You Notes from students = prepared daily, while school is in session

Anniversary Cards/Renewal Letters = prepared monthly

LYBUNT = Last Year But Not Yet This Year

Simon = No Frills Appeal Typically Sent to Alumni Who Haven't Given to ETSU Before



[Date]

[Barcode] [Combined Salutation Name] Address Line 1 Address Line 2 [City], [State] [Zip Code]

Dear [Combined Salutation Name],

The Bucs are back! In person! On campus!

If we learned anything from the challenges of the past year or so, it's to appreciate the value – and the joy - in routine interactions with people. It is wonderful to see so much purposeful activity again on campus and you can't help but feel energized and excited for the future. There is something truly special about seeing our students, faculty, staff, alumni, friends, and visitors simply smile.

The extended ETSU family continued to move mountains; albeit remotely. Now that we're back working face-to-face, there are no limits to what we can do. In addition to awarding over over two-and-a-half million dollars in scholarship funding to high quality students in 2020-21, here are some things we either recently completed or are planning for the near future:

- [Unit Bullet 1]
- [Unit Bullet 2]
- [Unit Bullet 3]
- [Unit Bullet 4]

Your continued support today is not only an investment in our region and our future; it's a sign of confidence in what we have been able to accomplish together. And it sends a strong signal to prospective students and parents, ensuring ETSU remains strong. If you have questions or need more info, contact [DoD Name], Director of Development, [Phone] or [e-mail].

Sincerely,

[Graphic with Dean signature and text]

P.S. [Unit PS (up to 2 lines)]

(cut here)

Gift to ETSU

to support ETSU as shown on the reverse. I am enclosing \$_



[E-number]

[Combined Salutation Name] [Address Line 1] [Address Line 2] [City], [State] [Zip Code]

Payment Methods

(to ETSU Foundation) Check: #

Online: etsu.edu/give

We are compliant with the Payment Card Industry Data Security Standard (PCI DSS) and we work to ensure your data is protected. If you are not comfortable donating online (or by check) you are welcome to call our office at (423) 439-6141.



John is from Morganton, NC and is pursuing a doctorate of pharmacy degree. The hiring manager at his pharmacy strongly recommended Gatton over other pharmacy schools in the area, but he was undecided until the day of his interview, when he had the opportunity to meet Dean Byrd and many other faculty and staff. While some schools talk about "family;" he experienced it that day.

"From the first time I walked into Gatton, I felt a sense of belonging and knew this was the place for me. I truly enjoy the clinics and opportunities I have to work in the community and give back. The community rallied to help create Gatton and provide the opportunity for me to become a pharmacist. I believe it is really important for our students to show the community how much we appreciate that."

John participates in many outreach projects through Kappa Psi Pharmaceutical Fraternity and the Student National Pharmaceutical Association, for which he currently serves as president. "I really have a strong desire to impact the health of my patients and I look forward to learning to be a proficient practitioner and Gatton alum!"

Over \$39.6 million in Institutional Scholarships Awarded 15:1 Student-to-Faculty Ratio Gatton ranked 1st in TN for Year 1 residency match More than 133,000 **Student Community** \$47.5 million in Research Awarded are for FY2020 Over 2.7 million Database Searches at Sherrod

Designate my gift to the area(s) below. Gifts with no boxes checked will be directed to University Top Priorities.

[Graphic with Unit Designations]

$\hfill \square$. I (or my spouse) work for a matching gift company. Find out	if your employer matches at <u>www.matchin</u>	nggifts.com/etsu.
Please send me information about:	Office Use	AN22[XX]
☐ How to create a scholarship/professorship		
☐ How to include ETSU in my estate plans		
☐ How to make a stock or securities transfer	ETSU is an AA/EEO Employer	

Appendix 3 – Solicitation Reply Devices

Example A. College/Unit Letters will include the designations requested by the college/unit, PLUS Top University Priorities and Other, with a line to write in a specific designation. For example:

Designate my gift to the area(s) below. Gifts with no boxes checked will be directed to University Top Priorities.

Student Life & Enforment (Dean's Fund) Buccaneer Crisis Fund Bucky's Food Pantry Buc\$ for Books ETSU Counseling Center Disability Services Veterans Affairs	Residence Life & Leadership Mary V. Jordan Multicultural Center Roan Scholars Leadership Program First-year Experience Greek Life Education Fund University Top Priorities (greatest need) Other (describe)				
☐ I (or my spouse) work for a matching gift company. Find out if your employer matches at www.matchinqqifts.com/etsu .					
Please send me information about: How to create a scholarship/professorship. How to include ETSU in my estate plans. How to make a stock or securities transfer.	For Office Use Only ANXX ETSU is an AA/EEO E mployer				
Example B. University-wide solicitations (pocket calendars, Day of Giving, President's Circle, LYBUNTs, etc.) will use the designations shown here: Designate my gift to the area(s) below. Gifts with no boxes checked will be directed to University Top Priorities.					
□ University Top Priorities (greatest need) □ Alumni Legacy Scholarships □ College of Arts and Sciences □ College of Business & Technology □ College of Clinical & Rehabilitative Health Sciences □ Clemmer College (formerly Education) □ College of Graduate & Continuing Studies □ Honors College □ Quillen College of Medicine □ College of Nursing	□ Gatton College of Pharmacy □ College of Public Health □ Sherrod Library □ Student Life & Enrollment □ Roan Scholars Leadership Program □ Martin Center for the Arts □ University Athletics □ WETS-FM Radio □ Other (describe)				
☐ I (or my spouse) work for a matching gift company. Find out i	f your employer matches at <u>www.matchinqqifts.com/etsu</u> .				
Please send me information about: ☐ How to create a scholarship/professorship. ☐ How to include ETSU in my estate plans. ☐ How to make a stock or securities transfer.	For Office Use Only ANXX ETSU is an AA/EEO Employer				
□ How to make a stock or securities transfer.					

Example C. On certain solicitations, it may be appropriate to include the following designations. This will be done with the approval of the VP for Advancement.

- Buccaneer Student Crisis Fund
- Employee Assistance Fund
- Bucky's Food Pantry
- ETSU Counseling Center

Appendix 4 – Contacting LYBUNTs (those who donated last year but not yet this)

Background:

Retaining donors we have worked so hard to acquire is critical to growing production and increasing alumni participation.

The Goals and Expectations Policy asks prospect managers to conduct or orchestrate a minimum of two substantive face-to-face contacts per year with each managed prospect. Ideally, at least one of these contacts will include a discussion about making an annual gift.

DoDs can use the sample "invoice" letter (Appendix 5) as a starting point, as needed.

Schedule:

July Fiscal year begins

August – June Anniversary Cards to donors on anniversary of their last gift (central)

November LYBUNT message added to calendar appeal (*central*)

November Calls to people on the DPT "bubble"

LYBUNT appeal, as determined by directors of development (units)

April Day of Giving LYBUNT appeal June LYBUNT and Lapsed appeal

Sample Anniversary Card (central):



Happy Anniversary

Happy Anniversary!

Nearly a year ago, you made a gift to East Tennessee State University. Thank you so much for your support and for creating opportunities for ETSU students.

When you give to ETSU, you join a community of supporters who truly make a difference every day. Renew your support by visiting etsu.edu/give or by sending a check in the enclosed envelope.

Sincerely

Assistant Director, Annual Giving

and I'm the (title) at East Tennessee State University. We're coming to the end of the fiscal/calendar year on [Date], and we are reaching out to our past donors to see if they will renew a gift to the University this year. [For end-of-CV.] If we receive your gift postmarked by December 30th, your gift qualifies as a tax-free charitable donation for the 20XX tax year "I already received a call; I said I'd think about it." Okay, thanks for your consideration. In the event you decide to make a gift before [Date], is it ok if I send you a postage paid return envelope in the mail? If yes, Is <address> the correct place to send? Also note that you can make an online gift at any time by visiting: www.etsu.edu/give "I don't think I can do anything this year." I understand. We realize that it's not always feasible to support ETSU; however; at this point in the year, we are emphasizing alumni participationso, really, even a gift of \$ would be more than generous. If not, perhaps \$20.22 for 2022? "Yes and/or what did I give last year?" Last year you made a gift of \$ to Do you think you could do \$ this year? (Upgrade giving level; work fom last year's amount) "Sure. Just send me something in the mail." Great. I will be more than happy to send you some more information. Is there anything in particular you would like to know more about? I just want to remind you that our giving year ends on June 30th. We would be so appreciative if you could make your gift by that date. Do you think you are able to do a gift of \$?" (Upgrade; if that's no good, perhaps another amount or \$20.22 for 2022. No reply There are a lot of great things happening right now on campus [talk about your area(s). Last year you made a gift of \$? (Upgrade; if that's no good, perhaps another amount or \$20.22 for 2022. No reply There are a lot of great things happening right now on campus [talk about your area(s). Last year you made a gift of \$ to Do you think you area for your support in the fu</address>	Appendix 4 – Contacting LYBUNIS (Sample Scripts)
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 Thank again for gift Verify contact info – emphasize e-mail and employer name Make sure to provide/remind online giving link: www.etsu.edu/give Thank again and tell donor to have a great night/afternoon Rejection closure "Thanks for taking some time to talk with me." "We hope we can count on your support in the future." Thank again, and tell donor to have a great night/afternoon. Voicemail Script: Hello, I'm calling to speak with Dr./Mr./Mrs./Ms, My name is and I'm the (title) at East Tennessee State University. We're coming to the end of our fiscal year on June 30th, and I am calling to see if you'd consider making a renewal gift to the University 	No reply There are a lot of great things happening right now on campus [talk about your area(s). Last year you made a gift of \$ to Do you think you could do \$ this year (Upgrade giving level)
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line, you can visit www.etsu.edu/give . Thanks very much for your time and have a great day! Make checks payable to ETSU Foundation, PO Box 70721, Johnson City, TN 37614	and I'm the (title) at East Tennessee State University. We're coming to the end of our fiscal year on June 30th, and I am calling to see if you'd consider making a renewal gift to the University this year. You can give me a call back at or, if you'd like to make a donation online, you can visit www.etsu.edu/give . Thanks very much for your time and have a great day!



July 1, 2021

Elizabeth Doe 123 W Main St Jonesborough, TN 37659

Dear Elizabeth,

Thank you so much for taking the time to speak with me about ETSU. We appreciate your consistent support, especially to the College of XXXXXXXX. Your donation will immediately go to work, helping our most critical assets: our students.

To complete your gift, fill in the form below and return in the envelope provided or visit our website at etsu.edu/give. If you have questions or need more information, do not hesitate to reach out to me at (423) 439-6141 or seejs1@etsu.edu.

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