



FOUNDATION

EAST TENNESSEE STATE UNIVERSITY



Quarterly Report
4th Quarter, period ending
June 30, 2018

Dear Loyal ETSU Supporters,

Thank you to all of our alumni, friends, partners, and especially to our Foundation Board of Directors and President's Circle members. The entire ETSU family has come together to make this past year a tremendous success. **All** our production benchmarks are up and we are making tremendous progress toward our strategic goal of raising at least \$25M per year by 2026. This is a significant accomplishment and simply would not have happened without you! Here are some items of note from the past quarter:

- The December **2017 Tax Cuts and Jobs Act** repealed the deduction for charitable gifts made for the right to purchase preferred seating at college and university athletic events. Subsequent to this decision, the Council for Advancement and Support of Education (CASE) advised we could not consider these contributions as philanthropic giving. In July 2018, **CASE granted an exception** allowing us to count these contributions once again. This exception is in place until July 1, 2020. This means we are once again able to credit contributions made for athletic seating contributions toward President's Circle and DPT eligibility, but these payments are still not deductible for tax purposes.
- The **Distinguished President's Trust** dinner was held at Meadowview on April 13, 2018. During the event, we were proud to honor 30 people for their support to ETSU and the Foundation. View/download photos from the event [here](#). Portraits from the event are [here](#). Password is DPT2018.
- The **Foundation Annual Luncheon** was May 5, 2018. This was a great opportunity for all Foundation/President's Circle members to meet and socialize. Photos are [here](#). Password is PC59.
- The **New Foundation Board** took their positions on July 1, 2018, under the leadership of Ron Hite (chair) and Rick Storey (vice chair). A special thank you to outgoing chair Tom Krieger and all the directors and President's Circle members for their passion and involvement! You can view the new board [here](#).
- **University Advancement has a new home!** We are now settled in our new offices in Yoakley Hall, third floor. Parking can be a challenge in this area, especially with Culp renovation ongoing, but if you're on campus, feel free to visit us.



Thanks so much for all your advice, leadership, and support!

A handwritten signature in cursive script that reads "Pam Ritter".

Pamela Ritter

President/CEO & Vice President for ETSU Advancement

P.S. The President's Circle exists to recognize donors to the university! When you donate \$500 or more to the area(s) you choose, we will invite you to special events and send you information about our progress (like this report). As we have just begun the new fiscal year, I encourage you to make your gift **today** by visiting www.etsu.edu/give.



- Major Giving:

- A search is currently under way for a second director of development to raise money for the College of Arts and Sciences. Once on board, the total number of fundraisers embedded in the colleges will be nine.
- Fundraisers completed a total of 1,117 personal visits with donors and prospects last fiscal year, an increase of 267 over the previous fiscal year, which represents a 31.4% increase.

- Advancement Services - synthesized screening information to prepare consultants for prospect interviews.

- Implemented process to electronically prepare materials for DPT (people with >\$10K cumulative giving).
- Completed designation coding for campaign reporting and trained to develop more sophisticated reports.

- Annual Giving - surpassed last year's production (including Athletics & WETS-FM) by 18%; 7% over goal.

- We will suspend the Phonathon for at least two years. We plan to invest in other areas and then reevaluate.
- We are planning a more robust Day of Giving in the spring, with increased communications and publicity.

- Planned Giving - booked \$5.57M+ in planned/deferred gifts, exceeding the fiscal year goal by 86%.

- Implemented birthday recognition for the Legacy Circle; sent over 400k emails and 6k+ direct mail pieces on specific planned giving topics; hosted or presented a seminar at least once per quarter.
- Executive director was named a Fellow through the Charitable Estate Planning Institute.

- Alumni Association - presented seven awards at the Awards Banquet and Annual Meeting May 4.

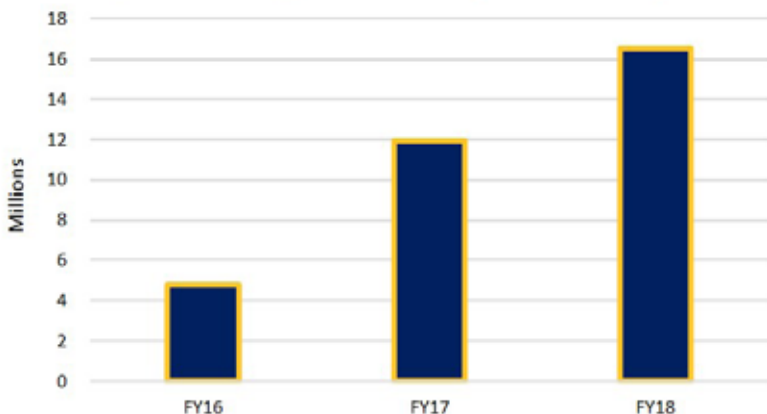
- Welcomed the Class of 1968 into the Golden 50s Club during Spring Weekend.
- Working on fall pregame athletic events; collaborating with Alumni Club leaders to plan events to engage alumni and students in their respective areas. Get involved or update your info at www.ETSUAlumni.org.

- Athletics - 2017-18 was the best fundraising year in program history! Total revenue of \$3.8M; ticket revenue over \$1.2M; total attendance of more than 148K; and marketing revenue of \$1.2M.

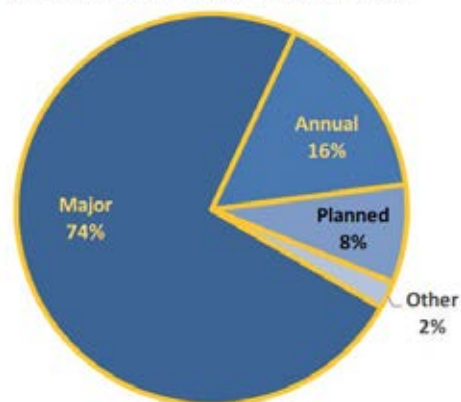
- Working on Greene Stadium field house; enhanced tennis/Brooks Gym seats; new Gordon Ball Court floor.
- Signed a 10-year deal with Van Wagner Sports/Entertainment, guaranteeing \$15M in revenue & savings.

PERFORMANCE METRICS (for 2017-18):

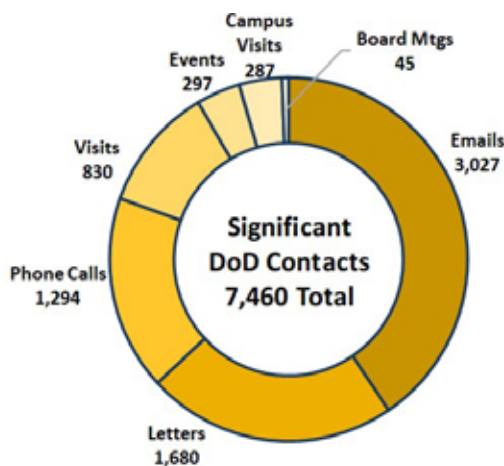
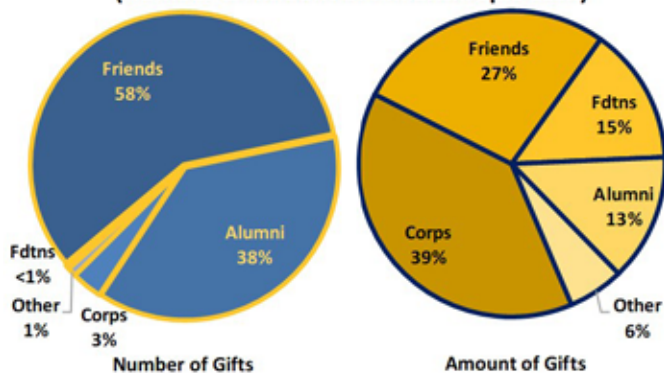
Total Advancement Production
(not including Private Giving from Grants)



Type of Giving
(Amount of Philanthropic Cash)



Source of Giving
(Number & Amount of Philanthropic Cash)



Private Giving in the form of grants reached \$12.2M this year, surpassing last year's total by more than 130%. **This brings total recorded giving for 2017-18 to \$29.2M.** The chart below summarizes net production, philanthropic cash, and the Annual Fund but does not include grants.

		<i>Net Production</i>	<i>Phil. Cash</i>	<i>Annual Fund</i>			<i>Net Production</i>	<i>Phil. Cash</i>	<i>Annual Fund</i>
Arts & Sciences	2017-18	4,897,305	1,187,317	110,023	Pharmacy	2017-18	228,672	159,864	20,690
	2016-17	2,500,795	1,555,530	79,529		2016-17	54,662	129,545	18,593
	Change	2,396,510	368,214	30,494		Change	174,010	30,319	2,097
Business & Technology	2017-18	1,043,765	493,802	165,943	Public Health	2017-18	105,844	155,168	21,911
	2016-17	2,728,777	1,168,439	102,975		2016-17	1,047,396	84,593	22,654
	Change	1,685,012	674,637	62,968		Change	941,552	70,574	744
Clinical & Rehab Health Sci	2017-18	342,762	85,035	26,381	Student Affairs	2017-18	245,222	262,068	74,565
	2016-17	71,692	64,588	22,367		2016-17	160,092	286,796	46,727
	Change	271,071	20,447	4,014		Change	85,130	24,728	27,838
Continuing Studies	2017-18	298,331	296,068	3,263	Sherrod Library	2017-18	15,735	15,735	12,585
	2016-17	3,930	3,525	3,525		2016-17	43,397	22,531	12,981
	Change	294,401	292,543	262		Change	27,662	6,796	396
Education	2017-18	96,908	98,968	43,420	Capital Projects	2017-18	206,986	1,021,183	N/A
	2016-17	78,185	73,035	27,899		2016-17	1,729,668	2,215,406	N/A
	Change	18,723	25,933	15,521		Change	1,522,681	1,194,223	N/A
Graduate Studies	2017-18	3,405	5,464	5,464	Athletics	2017-18	5,811,329	3,097,548	628,508
	2016-17	10,910	4,914	4,714		2016-17	1,441,833	1,109,290	458,210
	Change	7,505	550	750		Change	4,369,496	1,988,258	170,298
Honors College	2017-18	44,522	44,522	5,972	WETS-FM	2017-18	388,621	361,732	274,176
	2016-17	7,015	16,845	1,635		2016-17	556,297	464,413	360,917
	Change	37,507	27,677	4,337		Change	167,675	102,681	86,742
Medicine	2017-18	540,070	530,014	65,271	University Wide	2017-18	2,334,799	307,940	86,387
	2016-17	233,019	244,513	59,614		2016-17	1,230,903	155,178	78,720
	Change	307,050	285,501	5,658		Change	1,103,896	152,762	7,667
Nursing	2017-18	301,359	55,804	18,284	Total	2017-18	16,905,638	8,178,232	1,562,843
	2016-17	89,004	54,402	22,502		2016-17	11,984,419	7,653,543	1,323,562
	Change	212,354	1,403	4,217		Change	4,921,219	524,689	239,282

NET PRODUCTION = total gifts received and pledges recorded; includes Planned Giving.

PHIL. CASH = Philanthropic Cash; total cash received, excluding payments or prior-year pledges.

ANNUAL FUND = typically those gifts \$1K and below, excluding gifts to capital funds or endowments.

Report Schedule:

- 1st Quarter – Arts & Sciences, Business & Technology, Education, and Medicine.
- 2nd Quarter – Clinical & Rehabilitative Health Sciences, Nursing, Pharmacy, and Public Health.
- 3rd Quarter – Athletics, Student Affairs, University Programs, and WETS-FM.
- 4th Quarter – Annual Report.

ETSU is an AA/EEO employer. ETSU-046-15M.

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