



FOUNDATION

EAST TENNESSEE STATE UNIVERSITY



Quarterly Report
3rd Quarter, period ending
March 31, 2021

Dear Loyal ETSU Supporters,

I would like to take this opportunity to express my deep appreciation for each and every one of you for your continued dedication to the university. As always, I want to especially thank our Foundation Board of Directors and President's Circle members for the commitment you have made to ensure our university is the best in the region!

- **Campaign Update:** We are currently at \$101.2M or 84% toward the goal of \$120M by June 30, 2022. However, we still need help in the areas of Faculty and Facility Support. For updates and more information, visit [Join the Campaign for ETSU](#).
- **ETSU Day of Giving:** I want to give a special shout-out to Annual Giving and the Day of Giving Committee as well as Advancement Services. They ALL worked tirelessly to make this year a huge success! At the official end of Day of Giving, we received 875-plus gifts, totaling more than \$307K. We exceeded our goal for number of gifts by 10% and the total amount received was up 36% over 2019 figured. Gifts continue to come in, so we'll provide an update in the next quarterly report.

Again, thank you for all your advice, leadership, and support!

Sincerely,



Pamela S. Ritter
Vice President for University Advancement
President/CEO of ETSU Foundation

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



• Major Giving

- ◇ As of May 15, ETSU employees will once again be cleared for domestic travel. Our team of fundraisers are eager to get back on the road to visit all of the alumni and friends of the university they have been communicating with via Zoom and telephone over the last 15 months. Fundraising trips are already being planned and we look forward to having a full schedule of visits by this fall.

• Advancement Services

- ◇ Worked closely with athletics and accounting to convert athletic ticket payments into gifts and process ticket refunds for basketball and football.
- ◇ Supported preparations for Day of Giving with groups of segmentation reports.
- ◇ Participated in campus database RFP and began work on Advancement software selection.

• Annual Giving

- ◇ Prepared and sent direct-mail letters to the President's Circle and to constituents of Student Life & Enrollment, Sherrod Library, and the Honors College.
- ◇ Designed and sent Valentine's Card to alum couples.
- ◇ Delivered save-the-date postcards to past donors, in advance of Day of Giving. Also sent introductory letters to potential new donors.

• Alumni Association — please see page 4 for Alumni updates.

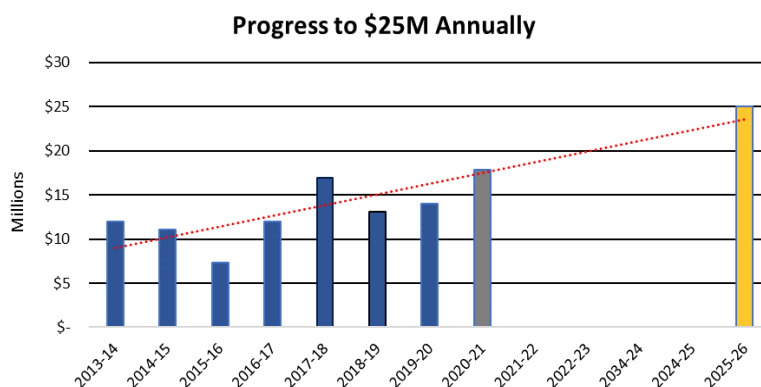
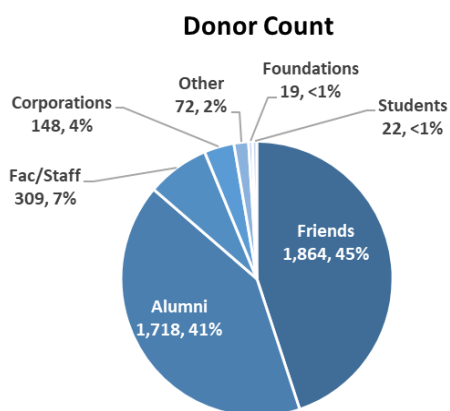
• Planned Giving

- ◇ Required Minimum Distributions (RMD) - what you need to know:
 - * The new RMD age is 72.
 - * If you are still contributing to an IRA after 70 1/2 and plan to make a Qualified Charitable Distribution (QCD), you will be taxed on the amount you have contributed.
 - * Beginning in 2022, the RMD percentage will decrease by approximately .25-.50%.
 - * Consider investigating tax-efficient methods to leave retirement assets to your children. There may be better alternatives for you than naming them as direct beneficiaries.

ETSU Foundation Balance

The total fund balance as of March 31, 2021 is \$125,229,880.

NOTES: Balance is based on market value as of date indicated; balance will fluctuate with market conditions; charts below reflect activity from July 1, 2020 to March 31, 2021.



Funds Raised			
	Net Production	Philanthropic Cash	Annual Fund
2020-21	17,823,366	8,397,055	1,178,139
2019-20	7,567,929	5,301,779	886,656
Change	10,255,438	3,095,276	291,483
% Chg	136%	58%	33%

Staff Activity						
	Campus Visits	Visits	Email	Events	Letters	Calls
2020-21	31	288	4,328	196	2,179	1,248
2019-20	69	486	2,799	278	983	1,266
Change	(38)	(198)	1,529	(82)	1,196	(18)
% Change	-123%	-69%	35%	-42%	55%	-1%

Unit Reports

(see complete schedule below)

Alumni Association

- In January, the ETSU Alumni Board unanimously elected a new slate of Executive Committee Officers. Mr. Bryan Daniels, President; Mr. Tom Tull, President-Elect; Dr. Virginia Bieber, Secretary/Treasurer; and Mr. Lawrence Counts, Past President.
- The Alumni Board also welcomed three new members: Dr. Dorsha James, Dr. Gaurav Bharti, and Mr. Paul Bashea Williams.
- We thank Mr. Roger Kennedy, Ms. Ellen Wilhoit, and Mr. Andy Whetsel for their dedication and service to our Board, as they completed their Board service.
- The Alumni Association staff relocated to our new office on the first floor of the Model Mill. We look forward to welcoming Alumni and friends to our new space later this year.

Athletics

- During Spring 2021, ETSU Athletics participated in competition for all sports at the same time for the first time in history.
- ETSU Athletics recently hired Simon Harris as Women's Basketball Head Coach and Desmond Oliver as Men's Basketball Head Coach.
- ETSU Athletics generated approximately \$60K on ETSU's Day of Giving through the philanthropy of 160 donors.
- ETSU has won SoCon championships in men's tennis, men's golf, and women's golf during the Spring 2021 semester. Additional championship opportunities exist this spring.
- Lindsey Stallworth earned All-American honors at the 2021 NCAA Cross Country Championship. Stallworth finished 38th overall and was ETSU's first cross country All-American in program history.

Student Life & Enrollment

- A new scholarship fund was formed to benefit ETSU students active in programs at the Langston Centre in memory of Michael Young, the last graduate of Langston High School.
- A new foundation fund was formed for the Dr. Patricia Robertson Pride Center to raise funds for programming for our LGBTQI+ community and allies.
- \$117,121 has been awarded to 223 ETSU students in need from the Buccaneer Student Crisis Fund since May 1, 2020.
- Over \$20K was raised to support Student Life and Enrollment foundation accounts during ETSU Day of Giving.

University Programs

- During Day of Giving 2021, the Honors College received gifts from 23 donors totaling \$3,230.
- The Library received gifts from 16 donors totaling \$995.
- Graduate and Continuing Studies received gifts from 8 donors totaling \$410.

WETS-FM

- We held our spring fundraiser March 20-26. We did so using staff to work the phones instead of volunteers. This "socially distanced" fundraiser (hopefully our last of these) raised more than \$44K in eight days and contributed to nearly \$83K in total for the third quarter. Make donations or get more information at www.wets.org.

Report Schedule:

- ◆ **1st Quarter — Arts & Sciences, Business & Technology, Clemmer College, and Medicine**
- ◆ **2nd Quarter — Clinical & Rehabilitative Health Sciences, Nursing, Pharmacy, and Public Health**
- ◆ **3rd Quarter — Athletics, Student Life & Enrollment, University Programs, and WETS-FM**
- ◆ **4th Quarter — Annual Report**