



FOUNDATION

EAST TENNESSEE STATE UNIVERSITY



Quarterly Report
4th Quarter, period ending
June 30, 2017

Dear Loyal ETSU Supporters,

Academic and fiscal year 2016-17 has been a “Season of Change” for the ETSU Foundation and University Advancement and it has truly been a team effort. Among many other accomplishments during the year, we:

- Completed hiring to increase fundraisers from two to 11 and made key additions to central advancement to support and enhance fundraising efforts.
- Established new bylaws for the ETSU Foundation (www.etsu.edu/alumni/foundation).
- Welcomed a new Foundation Board of Directors (www.etsu.edu/alumni/foundation/directors.aspx).
- After lengthy review, the Board of Directors selected two investment firms to manage the endowment: Goldman Sachs and AGC of Atlanta. We are in the process of converting the funds now.
- Developed a new program of events and activities for ETSU supporters: the “President’s Circle.” You become a member of the circle by giving at least \$500 to ETSU during the calendar year. We are planning the following President’s Circle events:
 - o The Academy for the President’s Circle. October 27, 2017 we will conduct an event to give the President’s Circle members an opportunity to become students again. You will be able to select three courses held on campus to reacquaint yourself with fellow students and faculty. Please look for your invitation soon.
 - o Football Pre-Game Activities – held at the Wayne G. Basler Center of Physical Activity Courtyard near the stadium, to gather with President’s Circle members. Meals catered by Firehouse restaurant will cost \$15 for adults and \$8 for children under 10. Foundation directors will also be on hand to help cheer the Bucs to victory! Home games are 9/2, 9/16, 9/23, 10/7, 10/28, and 11/4. Activities begin two hours before game time.



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

Pamela Ritter
President/CEO & Vice President for ETSU Advancement

P.S. We have also made *significant* progress toward our strategic goals of raising \$25M per year – every year – and increasing alumni participation. The last two pages of this report provide detail showing how we achieved \$17.2M for 2016-17. We will prepare similar reports quarterly. Go Bucs!

For questions or more information, President’s Circle members can contact Mitzi Martin at 423-439-5714 or martinm@etsu.edu. Learn more about your Board of Directors at <http://www.etsu.edu/alumni/foundation/directors.aspx>.

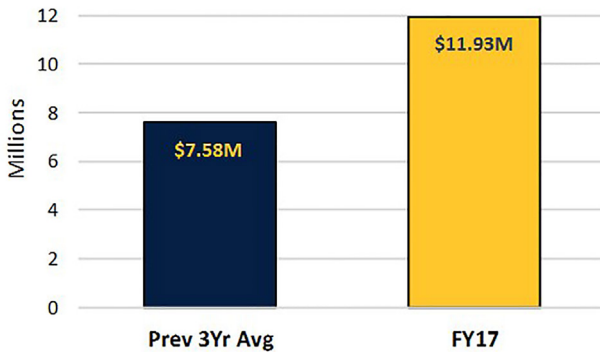
NOTES FROM THE PRESIDENT/CEO OF THE ETSU FOUNDATION:

- **Major Giving** – staff will attend “Developing Major Gifts” course, conducted on the ETSU campus August 15-17, led by Indiana University’s Lilly Family School of Philanthropy.
- Andrew Amodei, Bus. & Tech., left the University in July; working to fill the position ASAP.
- **Advancement Services** hired a Technology Coordinator for report writing; Gift Processing position now open; contracted for campaign wealth screening and related services for FY18+; EFT donor numbers up significantly
- **WETS-FM** – excellent year in fundraising! Listener support increased 63.5% (\$371.2K total).
- Annual Giving donations up 34%; total donors are up; social media presence coming soon.
- **Planned Giving** booked \$2.8M+ in planned/deferred gifts and \$150K in major gifts; nearly 5K website visitors during 2016-17; conducted 11 presentations and/or Legacy Circle events.
- **Alumni Assoc.** presented 7 awards; welcomed ‘67 class to Golden 50s; working on new football events; regional Alumni-club organizing is ongoing, with more alumni/student activities.
- **Athletics** – excitement surrounding SoCon Champion men’s BB team and the new on-campus FB stadium has fueled great passion/anticipation for this year; this was the second highest fundraising total in history of ETSU Athletics; while activity for the Excellence Fund, 1911 Legacy Wall, Letterwinner Lockers, and Family Trees grows. We are very grateful to our donors, season ticket holders, alumni, and fans.

PERFORMANCE METRICS:

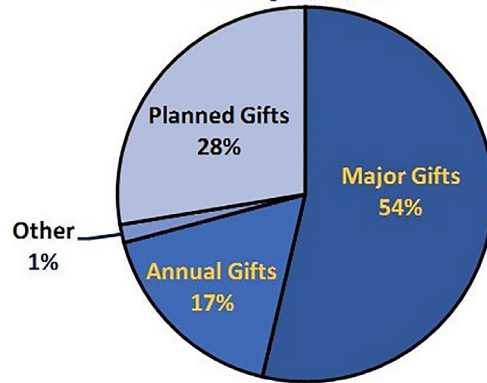
Total Advancement Production

Ending 06/30/2017



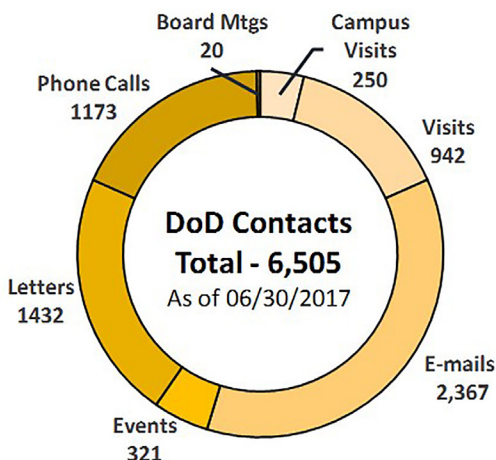
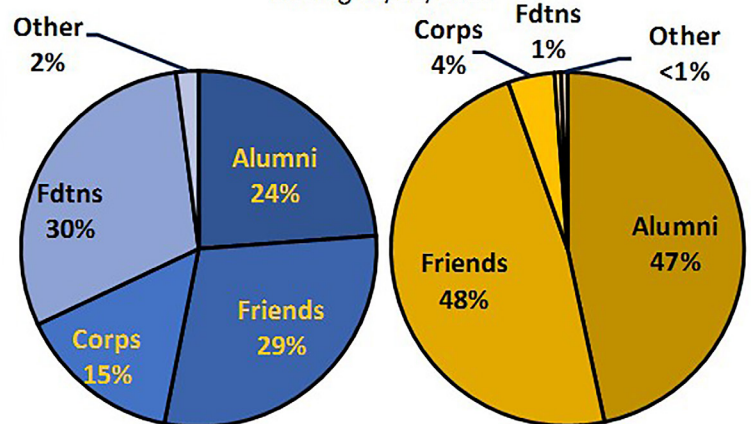
Type of Giving (Philanthropic Cash)

Ending 06/30/2017



Source of Giving (Philanthropic Cash)

Ending 06/30/2017



Amount of Gifts

Number of Gifts

Private Giving in the form of grants reached \$5.3M this year, matching the previous 3-year average. **This brings total recorded giving for 2016-17 to \$17.2M.** The chart below summarizes net production, philanthropic cash, and the Annual Fund but does not include grants.

		Net Production	Phil. Cash	Annual Fund			Net Production	Phil. Cash	Annual Fund
Arts & Sciences	2016-17	2,505,788	1,555,530	79,529	Pharmacy	2016-17	54,893	129,545	18,593
	2015-16	420,719	395,752	70,282		2015-16	98,068	211,773	6,530
	Change	2,085,069	1,159,778	9,247		Change	43,174	82,228	12,063
Bus & Tech	2016-17	2,729,027	1,168,439	102,975	Public Hlth	2016-17	1,047,521	84,593	22,654
	2015-16	361,585	264,656	76,840		2015-16	59,570	128,581	18,405
	Change	2,367,442	903,782	26,135		Change	987,951	43,988	4,249
Clin & Rehab	2016-17	71,692	64,588	22,367	Student Aff	2016-17	160,092	286,796	46,727
	2015-16	100,412	101,637	11,046		2015-16	85,478	165,007	22,522
	Change	28,720	37,049	11,321		Change	74,614	121,788	24,206
Continuing Stu	2016-17	3,930	3,525	3,525	Library	2016-17	40,241	22,531	12,981
	2015-16	1,155	1,135	1,155		2015-16	24,239	17,200	12,375
	Change	2,775	2,390	2,370		Change	16,002	5,331	606
Education	2016-17	80,785	75,635	27,899	Capital Proj	2016-17	1,796,627	2,216,838	N/A
	2015-16	81,231	79,019	24,773		2015-16	889,980	1,417,399	N/A
	Change	446	3,384	3,126		Change	906,647	799,439	N/A
Graduate Stu	2016-17	11,135	4,914	4,714	Athletics	2016-17	1,327,541	1,108,353	458,273
	2015-16	2,440	2,345	2,450		2015-16	767,803	733,839	342,639
	Change	8,695	2,569	2,264		Change	559,739	374,514	115,634
Honors	2016-17	6,955	16,845	1,635	WETS-FM	2016-17	545,849	464,413	360,917
	2015-16	106,362	26,472	2,353		2015-16	449,629	355,257	261,420
	Change	99,407	9,627	718		Change	96,220	109,156	99,497
Medicine	2016-17	233,119	244,513	59,614	Univ Wide	2016-17	1,230,553	155,178	78,720
	2015-16	448,196	464,354	48,462		2015-16	510,083	959,116	70,036
	Change	215,076	219,841	11,151		Change	720,470	803,938	8,685
Nursing	2016-17	86,392	54,402	22,502	GRAND TOTALS	2016-17	11,932,140	7,656,638	1,323,625
	2015-16	59,984	158,186	15,006		2015-16	4,460,019	5,481,730	986,293
	Change	26,408	103,784	7,496		Change	7,472,121	2,174,908	337,332

NET PRODUCTION = total gifts and pledges received; includes planned giving.

PHIL. CASH = Philanthropic Cash; total cash received, excluding payments on 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 & Rehab Hlth Sci, Nursing, Pharmacy, and Public Health; 3rd Quarter – Athletics, Student Affairs, University Programs, and WETS-FM; and 4th Quarter – Annual Report).