



ETSU President's Circle	
Responsible Official: Vice President for University Advancement	Responsible Office: University Advancement

Policy Purpose

This policy provides direction regarding how ETSU Advancement will work with private donors to recognize their efforts to support ETSU and our students.

The purpose of the ETSU President's Circle is to recognize significant donors in a given year and to help encourage these donors to increase giving to the university.

Policy Statement

University Advancement will ensure donors understand the ways in which they are recognized for supporting ETSU and we will work to ensure consistency across campus.

Definitions

N/A

History

Effective Date: 6/20/2018

Revision Date: 10/4/2022

Revision Notes: This revision adds detail regarding how gifts are counted for President's Circle membership and how Advancement will manage the cohort groups; changes the minimum amount to qualify for President's Circle to \$1,000; and changes the gift period to the most recently completed fiscal year.

Procedure (s)

Attachments:

I. Responsibilities:

- a. The Vice President for Advancement is responsible for this program and for planning and conducting events designed to enhance relationships between donors and the university.
- b. The Office Manager will serve as the primary point of contact for President's Circle.
- c. Annual Giving will provide communications support for President's Circle.

- d. Advancement Services will provide data and analysis, to include mail lists.
 - e. Annual Giving will send out reminders to members, as described below.
- II. **President's Circle Members.** Historically, this group has been known as members and/or directors of the ETSU Foundation. This changed with the 2016 revision to the Foundation bylaws.
- a. Advancement Services will use giving records in Banner to develop a list of all donors (using combined household giving) who have given \$1,000 or more in the most recently completed fiscal year.
Notes:
 - 1. In FY23, we began applying the \$1,000 amount, while still recognizing \$500 donors from FY22.
 - 2. Totals include all tax-deductible gifts, and non-taxable gifts (IRA distributions), and soft credits with the following caveats:
 - i. Donors with \$1,000 or more in gifts to WETS are also eligible for President's Circle.
 - ii. Athletics obligation gifts count at the 80% portion formerly deductible so as not to further penalize these donors
 - b. New President's Circle cohort groups are typically established in July of each year, looking at the prior 12 months as described above.
 - c. Annual Giving will send "welcome" letters to the new cohort.
- III. **Events.** These activities are considered to be stewardship, however, we will ask attendees to pay a nominal cost for attendance. These are examples and can change from time-to-time:
- a. President's Circle Tailgates, held before each home football game.
 - b. President's Circle Academy, held in the fall and offering the opportunity for supporters and friends to experience what it's like to be a student again.
- IV. **Reminders.** Annual Giving will provide payment reminders, as necessary, to President's Circle members. Reminders will include the amount needed remain part of the current cohort. Reminders will follow this schedule:
- a. Late-July direct mail (welcome).
 - b. Late-January direct mail.
 - c. Day of Giving appeal (direct mail).
 - d. E-mails in June (include a link to online giving).
 - e. Foundation Quarterly Reports (September, December, March, and June)

Related Form(s)

N/A

Scope and Applicability

	Governance	
	Academic	
	Students	
	Employment	
	Information Technology	
	Health and Safety	
	Business and Finance	
	Operations and Facilities	
	Communications & Marketing	
X	Advancement	