



Distinguished President's Trust - Cumulative Giving Recognition Societies	
Responsible Official: Vice President for University Advancement	Responsible Office: University Advancement

Policy Purpose

This policy serves to define the structure, dollar amounts and lists samples of perquisites for the Distinguished President's Trust (DPT) cumulative giving recognition levels. It also provides information to other ETSU stakeholders regarding ETSU's cumulative giving societies.

Policy Statement

Stewardship (of which the Distinguished President's Trust is one part) recognizes donors to the institution, helping ensure satisfaction of current donors and helping to motivate new ones. This policy provides guidance and procedures for the coordinated management and recognition of DPT members.

History

Effective Date: 07/24/2017

Revision Date: 10/16/2019

Revision Notes: This revision clarifies handling of DPT members who have been "grandfathered;" includes reference to letters sent to new/rising DPT members; and includes a name for the \$10,000 DPT level (Carillon Society).

Procedure (s)

Attachment:

Listing of DPT Cumulative Giving Recognition Societies w/Dollar Amounts

- 1. Background.** The Distinguished President's Trust began as a way to honor ongoing support for ETSU. An annual DPT awards banquet was established to recognize lifetime cumulative support to the university through the ETSU Foundation. In the early 1990's the DPT was restructured to encompass increased levels of cumulative giving with a series of plaques and wall recognitions. Significant cumulative giving with a \$10,000 minimum is recognized at an annual award banquet – the Distinguished President's Trust Banquet. The DPT Banquet generally features the awarding of plaques and other commemorative items, coupled with entertainment featuring ETSU's premier programs and students, accompanied by a high-end meal.

2. Eligibility: Individuals and corporate entities are eligible for inclusion in these lifetime recognition levels. Eligible gifts include cash received, gifts-in-kind received, soft credit awarded, and (in some cases) services received. Underwriting through WETS is included. Pledges are ineligible for DPT recognition, beyond 2016.

Examples for handling grandfathered pledges:

- When a \$50,000 bequest pledge has qualified a donor for Bronze level, if he/she makes an additional outright gift of \$50,000, ETSU will consider the criteria for Silver as having been met.
- If a \$50,000 regular pledge which has qualified a donor for Bronze level is not being actively satisfied and the same donor make another \$50,000 outright gift to another purpose, ETSU will count gifts made against the initial pledge toward future DPT levels. If a grandfathered pledge is being actively satisfied, it may continue to be counted toward higher levels.

3. Tracking Eligible Candidates: Through Advancement Services, University Advancement takes the initiative in tracking the levels of cumulative giving throughout the entire university. Advancement Services prepares and delivers reports approximately in November of each year, detailing donors who have either achieved or who are within a specific dollar amount of achieving a new DPT giving society level. These reports will be delivered to the VP for Advancement and will include all pertinent information necessary to contact donors regarding their having attained, or their close proximity to, reaching new cumulative giving society levels.

- a. Advancement staff will make every attempt to contact those eligible to move up in level.
- b. DoDs will use these cumulative giving levels as cultivation tools whenever possible.

4. Stewarding and Benefits of Giving Society Levels: Advancement staff ensure that cumulative giving levels are tracked, marketed and consistently stewarded. Upon achieving each new level of DPT status – the donor is notified via letter and they and their guest(s) are invited to be the ETSU Foundation’s guest with complimentary tickets to the annual Distinguished President’s Trust Recognition Banquet. Although invitations will be sent to all donors who have reached recognition levels in previous years, only those who have attained new cumulative giving recognition society levels are offered complimentary attendance for the DPT event.

5. Dates of Receipt/Recognition. To be awarded at the next DPT event, gifts should be received by December 31 of the previous year. Exceptions will be considered.

6. Hall of Honor. Plaques recognizing DPT levels Bronze and above will be managed according to the attachment and based on assigned credit in Banner. Donor wishes will be accommodated to the degree possible.

Scope and Applicability

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Attachment A – DPT Cumulative Giving Recognition Societies

These giving levels recognize the cumulative giving of individuals, businesses, and corporations to the ETSU Foundation. They represent significant contributions to the advancement of the university and are thus accorded the following recognitions.

Primary Distinguished President's Trust

Carillon Society #	\$10,000
Bronze Society *	\$50,000
Silver Society *	\$100,000
Gold Society *	\$500,000

Platinum Societies

Platinum Society *	\$1million
Platinum Society – II *	\$2million
Platinum Society – III *	\$3million
Platinum Society – IV *	\$4million

Diamond Societies

President's Diamond Society *	\$5million
President's Diamond Society VI *	\$6million
President's Diamond Society VII *	\$7million
President's Diamond Society VIII *	\$8million
President's Diamond Society IX *	\$9million

Pinnacle Societies

Pinnacle Society *	\$10million +
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= Honorees receive plaque recognition

* = Honorees receive a personal "book" recognition and are added to our "Hall of Honor"

All honorees are invited to be guests at the DPT Awards Banquet