What We Learned from Our 30TH ANNIVERSARY CELEBRATION

As we come to the end of our 30th year, and we think about the planning that started in 2015 with brainstorming by a gathering of East Tennessee Foundation (ETF) staff and close friends, the task force introduction and logo unveiling (by staff member Anna Wiggins coming out of a cake) at our annual meeting, to the choice of family philanthropy and the “Generous Genes Roadshow” as the focus of our year, it has been a terrific learning experience.

The family philanthropy theme struck a positive chord in each of the three communities our roadshow visited (Athens, Knoxville, and Johnson City), and the response was gratifying. We learned that East Tennessee is thankful for our work, the impact we have had, and the nearly limitless potential for future growth and giving that exists. Knowing this motivates our ETF team to do as much as possible with our time and resources to make communities stronger and lives better in East Tennessee.

And, we learned what we already knew: our “team” is our most valuable asset – passionate, talented, committed, resilient, and bright. We learned that our board is willing to lead and support us every step of the way and nimble enough to change course, as they demonstrated in choosing to celebrate with a roadshow by boarding a bus and taking the family philanthropy message out to the region in lieu of a party.

We learned that our East Tennessee region is united by our roots – whether ancient/old or recent/new, and by our HOPES for making lives better. We learned that our donors are generous for the right reasons – changing lives for the better is more important to them than tax savings. We learned that our grantees are resourceful, entrepreneurial, hardworking, and capable.

By traveling out into the region we learned that philanthropy that is closest to the people is the most effective, most efficient, and the best value because it has the most accountability “built-in.” We learned that our work is impactful and important enough to deserve our effort for 30 more years!

Michael McClamroch, ETF President & CEO

We are grateful to our 30th Anniversary Task Force Members:
- S.M. Atchley
- Jeff Becker
- Howard Blum
- Amy Cathey
- Bobbie Congleton
- Ellen Fowler
- Rick Fox
- Paige Preston
- Avice Reid
- Mary Beth West, Chair
- Stuart Worden

Staff: Samantha Amick
Susan Blair
Trudy Hughes
Jackie Lane
Mike McClamroch
Patrick Wade

Go to: www.easttennesseefoundation.org,

click “GIVE NOW”

choose a fund, let us honor your friend or family member, and change a life forever!
In Judaism, charity is a mandate. “The main concept is called Tzedekah. It translates as ‘justice’ with charity being a part of the equation. Maimonides taught that there are multiple levels of Tzedekah. The thought process creates both opportunities and responsibilities, it is highly nuanced, and a significant part of our family’s work,” said Stephen Rosen.

1st Generation – In 1999, Stephen’s grandparents, Esther and Samuel Rosen were among the first to have funds at the Knoxville Jewish Community Family of Funds (KJCFF), an East Tennessee Foundation supporting organization. They created designated funds to support the Heska Amuna Synagogue, the Arnstein Jewish Community Center, and the Knoxville Jewish Alliance.

2nd Generation - Alexandra and Allen Rosen, Stephen’s parents, were involved with giving as long as he can remember. His mother, Alexandra Rosen, currently sits on the KJCFF board of directors. One of his family’s more recent funds is the Alice, George and Kenneth Palmer Fund for Arts and Sciences named for her parents and brother. Stephen’s family also helps to advise the Allen Rosen Fund of KJCFF, named for his father.

3rd Generation – Kim and Stephen Rosen have a donor advised fund at KJCFF that they opened with a stock transfer following the public sale of the Dollar General stores. It offered them a highly convenient tax advantage and has become an important part of their money management and philanthropic strategy. Kim’s parents, Allen and Lea Orwitz, have also been significant supporters of many Knoxville projects.

4th Generation - Kim and Stephen’s children, Nathan, Arielle, and Tifannie, are all active participants in B’nai Tzedek, the Jewish community’s youth philanthropy program. They have engaged in research, service learning, and investment management conversations. The most important part is being actual decision-makers in allocating money to causes they choose themselves. Recently, their grandmother (Alexandra Rosen) increased their donor advised fund levels, so they will continue to serve as fund advisors.

B’nai Tzedek Teen Philanthropy Program - To show that the Bar or Bat Mitzvah ceremony and celebration is the beginning (not the end) of living as a responsible, educated, concerned, interested, active, engaged Jew and human being, the B’nai Tzedek Teen Philanthropy Program of the KJCFF offers an engaging solution. By giving kids the opportunity to be philanthropists, they receive a most valuable gift—they learn how to give. The B’nai Tzedek Fund parents and their B’nai Mitzvah teens create a philanthropic fund in the teen’s name. The teen’s congregation and KJCFF’s Jeff and Nancy Becker Community Enrichment Fund match the child’s contribution to help initially establish the fund. During the year, teens learn about what it means to be a philanthropist and that one does not need to be rich to make a difference. Joining with other teens, they start to identify areas of particular concern and start to develop their own unique way of getting involved in the work of tikkun olam (repairing the world). For nearly ten years, the Jewish community, through the Jeff and Nancy Becker Community Enrichment Fund of the Knoxville Jewish Community Family of Funds (KJCFF), Temple Beth-El, and Heska Amuna Synagogue have joined in providing matching funds for teens to create their own philanthropic funds in concert with other teens and the KJCFF.

“I hope that my children are as generous as my great-grandparents and parents have been. They are being given these B’nai Tzedek funds in the hope that through the program’s process of giving they will learn the intangible benefits of generosity. It is important to Kim and me that one day our children will demonstrate philanthropic intentions by making their own contributions and grow the funds so it won’t be just the inherited funds,” said Stephen Rosen.
The Pat Summit Foundation
Announces New Medical Director

On September 22nd, The Pat Summit Foundation held a press conference at The University of Tennessee Medical Center to announce the hiring of the medical director who will lead The Pat Summit Clinic. Roberto Fernandez, MD, MPH, Ph.D., is a physician scientist and board-certified neurologist, with a subspecialty in behavioral neurology. Since 2012, he has served as an assistant professor of neurology at University of Virginia Health and has worked with the Memory and Aging Care Clinic. At the clinic he works closely with a multidisciplinary group of neuropsychologists, nurses, care coordinators, and social workers to provide care and support to patients suffering from dementia. He is also actively involved in clinical trials of new treatments for Alzheimer’s disease. He is an accomplished and published researcher who served as either principal investigator or sub-investigator on numerous Alzheimer’s research projects and clinical trials. A native of Costa Rica, he received his MD degree at the Universidad Autónoma de Centro America. He earned a Masters of Public Health degree and a Ph.D. in Neurobiology and Anatomy at the University of Rochester Medical Center in Rochester, New York, where he subsequently completed a residency in neurology and fellowship in behavioral neurology. The Pat Summit Clinic opens at the UT Medical Center this December. Dr. Fernandez will move here in January and begin his new position as Medical Director. Dr. Fernandez’s wife, Dr. Denia Ramirez, is a pediatric neurologist who will be working in the Knoxville community as well.

Pre-order your specialty Pat Summit Foundation Tennessee license plate

at www.patsummitt.org/license. A portion of the sale of each plate benefits The Pat Summit Foundation’s mission to defeat Alzheimer’s disease.

We are so pleased to welcome Deanene Catani as our new Director of Communications. With her marketing and fundraising experience at US Cellular, News Sentinel Charities, University of Tennessee Medical Center, and Diocese of Knoxville, ETF is indeed fortunate to have her to lead our communications efforts. She has a General Business and Marketing degree from Carson-Newman University and has attended Indiana University-Purdue University, Lilly Family School of Philanthropy. Her community involvement includes participation in Leadership Knoxville - Class of 2010, Knoxville American Marketing Association Past President and Locander Award Recipient, Carson-Newman University Alumni Board Secretary. Deanene and her husband, Tom Catani, have five adult children (three daughters and two sons).

The Pat Summit Foundation (PSF) is excited to announce the hiring of a new staff member. In November, Sunny Biden, Director of Public Relations, joined PSF team members Adam Waller, Director of Community Relations, and Patrick Wade, Executive Director. Sunny has a wealth of experience in event coordination, communications, fundraising, and working with volunteers. She also has a depth of experience working in the Knoxville Alzheimer’s community, having served the last three years as Outreach Specialist for the Alzheimer’s Association East Tennessee chapter. “We are absolutely thrilled to have Sunny on our team,” said Patrick Wade. “She has the qualifications, the experience, and the passion for Pat Summit’s mission to defeat Alzheimer’s disease.” Sunny has undergraduate and graduate degrees from The University of Tennessee. She and her husband, Josh, live in Knoxville with their daughters, Ellie (4) and Juliet (8).
East Tennessee Foundation Grants

Field-of-Interest Grants Programs

**Boyd Youth Education Fund** supports projects that support youth education, with a primary focus on Boy Scouts and Junior Achievement.
- Boy Scouts – Great Smoky Mountain Council: ScoutReach and STEM Scouts
- Boy Scouts – Sequoyah Council: ScoutReach
- Junior Achievement East Tennessee: JA’s Miss Business Experience
- Junior Achievement Tri-Cities – Junior Achievement Programs

Total Funding Awarded: $40,230

**Economic Development Fund** supports charitable and economic programs aimed at fostering regional economic development.
- City of Sweetwater – Sweetwater Tourism Signage
- Coal Creek Miners Museum – Community Development and Tourism
- Johnson County Farmers Market (JCFM) – Increasing Capacity of JCFM for Vendors and Customers

Total Funding Awarded: $7,900

**Leadership Education Fund** supports excellence in public education.
- Johnson County Middle School – Robotics Team

Total Funding Awarded: $1,500

Continued on page 5

**Sowing Seeds of Success and Sustainability (SOS)**

SOS is a project aimed at enhancing and improving the life-literacy skills of Washington County youth, connecting them with local food sources, and training teens in urban food and agriculture work.

Pictured at the $100,000 check presentation from the Washington County Community Foundation for the SOS collaborative initiative:
L to R: Elaine Evans, ETSU Medical Library; Wenny Elrod, Mountain Empire Literacy Outreach; Preston McKee, WCCF Adv. Bd. Chair; Emily Bidgood, ED, Appalachian RC&D; Jean Conger, WCCF Adv. Bd.; Lexy Close, Build It Up; Sheri Cooper, Science Hill High School Alternative Center; Dr. Randy Wykoff, WCCF Adv. Bd.; Raven Harmon, Science Hill Alternative Center; Mike McClamroch, ETF President & CEO; Anne Darden, WCCF Adv. Bd.
**Field-of-Interest Grants Programs - Continued**

**Affiliate Fund Grants**

**Fund for Greene County** was established in 1993 by a group of local donors who wanted to make a lasting commitment to the people of Greene County, by developing a resource to achieve community goals and promote Greene County. The Fund is a permanent endowment that has been created to support opportunities to advance and improve the quality of life for the residents of Greene County. A list of funded organizations and project names follows:

- Appalachian RC&D Council – History and Story through the Greene County Quilting Arts Tradition
- Boys & Girls Club of Greeneville & Greene County – Maintaining and Growing Goals for Growth Program
- Capitol Theatre of Greeneville – Capitol Bluegrass Revival Concert Series
- Greene County Imagination Library – Imagination Library Books for Greene County
- Greeneville Greene County History Museum – Traveling Trunk Show
- Greeneville-Greene County Community Ministries – Wings of Angels Ministry
- Tusculum College – Academic Workshops at Tusculum College’s Old Oak Festival

Total Funding Awarded: $4,500

**Respiratory Disease Fund** supports the diagnosis, research, treatment, education, prevention, and cure of respiratory diseases in Knox County.

- East Tennessee Children’s Hospital – Respiratory Disease Education Program
- InterFaith Health Clinic – Smoking Cessation Program for the low-income, uninsured, and underserved

Total Funding Awarded: $24,000

**Literacy Endowment Fund** supports literacy projects in East Tennessee.

- Knoxville Writers’ Guild – Bee and Beyond: Community Literacy Projects

Total Funding Awarded: $2,700

**Wildlife Preservation Fund** supports projects that foster the natural beauty of the Knox County community and conserve certain areas of land in a natural state as a scenic area, a sanctuary for plants, trees, animals, birds and other wildlife, and a protected watershed.

- Governor John Sevier Memorial Association – Pollinator Project
- Ijams Nature Center – Ijams Homesite Meadow Restoration Project

Total Funding Awarded: $4,500

**Respiratory Disease Education Program**
Affiliate Fund Grants

McMinn Community Fund was established in 1991 by a local donor who wanted to make a lasting commitment to the people of McMinn County by developing a resource to achieve community goals and promote McMinn County. The advisory board’s funding priorities (health issues; homelessness; senior citizens; education services; and child welfare) are reflected in the following list of funded organizations and project names:

- Athens-McMinn Family YMCA – Summer Learning Loss Prevention
- CASA Corridor of East Tennessee – New Training Curriculum
- Etowah Area Senior Citizens Center – Etowah Senior Enrichment Program
- Grace & Mercy Ministries – Emergency Family Food Aid
- Habitat for Humanity of McMinn County Home for a Veteran-in-Need
- Helen Ross McNabb Center – School Based Clinical Services
- Keith United Methodist Church – Nourish One Child, Nourish 50 More
- McMinn County Community and Educational Foundation – Dolly Parton Imagination Library
- McMinn County Senior Citizens, Inc. – Senior Citizen Nutrition Program
- Starr Mountain Quilts of Valor Quilters – Quilts of Valor
- Tennessee College of Applied Technology Athens – Community Access to Healthcare
- Tennessee Wesleyan University – Tennessee Wesleyan Health Clinic
- Wesley Memorial United Methodist Church – Wesley After-School Program

Total Funding Awarded: $64,325

Great gathering of our Past Chairs!
Six of our first eight attended our Fall Luncheon

L to R Standing - Jeff Becker, Keith Goodwin, Larry Mauldin, David Martin, Fred Womack, David White, Seated - Joan Allen, Natalie Haslam, Bobbie Congleton, Alice Mercer

L to R: Marilyn Miller, Paul Willson, Mike McClamroch, Trudy Hughes, Rob Preston, Randy Cockrell, Durant Tullock
WHERE HAS THE TIME GONE?

“Better three hours too soon than a minute too late.” William Shakespeare

Wow! 2016 has flown by and here we are, quickly approaching 2017. The end of the year always provides tax planning opportunities with a December 31 deadline. As you work with your advisors, please remember that your tax planning can help you achieve philanthropic goals in ways you may not have considered. Here are some ways East Tennessee Foundation might assist you with executing charitable gifts as part of a tax strategy.

**Gifts of appreciated stock can be a win-win-win.** The tax code currently allows donors to take a charitable deduction for the value of the stock, calculated by averaging the high and low price as of the date of contribution. At the same time, a gift of stock to charity avoids the capital gains tax that the donor would have to pay if he or she sold the stock. Finally, the donor specifies how the gift is used. These gifts can be used to contribute to one of ETF’s endowed funds that benefit any number of local communities, charities or charitable causes, or, a donor advised fund from which the donor initiates grants from time to time.

If you have an IRA, perhaps a **charitable IRA Rollover would help your tax situation.** If you are over 70 1/2 years old, you are required to take a minimum distribution from your IRA by the end of this calendar year. If that distribution is paid to you, it will be counted in your adjusted gross income, which may increase your income tax, but could also subject you to additional taxes or limit your deductions due to a “high income.” Instead, if you direct your IRA custodian to send that amount to East Tennessee Foundation, that payment will count as having satisfied your Required Minimum Distribution (“RMD”) requirement, but not increase your adjusted gross income. While this tactic cannot be used to fund any donor advised fund or supporting organization, ETF can help you use this strategy to build an endowment for your favorite charity, to strengthen a particular community in East Tennessee, or to benefit a charitable cause that is close to your heart.

**Of course, ETF also accepts cash, checks and credit cards. The deadline for any charitable deduction to reduce tax on 2016 income is December 31, 2016.** ETF has helped many individuals and couples get the biggest bang for their year-end buck through its donor advised funds. A donor advised fund can be established and receive a contribution by the end of the year, thereby creating a tax deduction for the donor, yet allowing the donor to thoughtfully consider and research, over the next year or several years, how the money in the fund should be granted to various charities. Under current law, the donor can even “bank” contributions over many years and then grant the money out in one or a few very large grants that tremendously impact the programs they fund. These ideas are just a few of the most common ways ETF assists professional advisors and their clients as they plan their year-end tax strategies. The variations are many and we strive to find the best option for each donor based on the donor’s passion, whether for a specific charity, a special cause, or a certain community. If you or a client is contemplating a gift to East Tennessee Foundation, please let me know so ETF can be sure to put that gift to its intended charitable use. You can contact me at 877-524-1223 or sdalley@etf.org.
New Staff continued from page 3

Daniel T. Crisp, our ETF intern, has served others in his work for most of his life, through customer service or time in the US Navy. He was raised in East Tennessee by a hardworking, blue collar family. He is a junior at UT Knoxville where he is studying sociology. He has a passion for people who help others, and working with East Tennessee Foundation connects him with those in our region who have dedicated their lives to doing just that.

ETF Staff

Sheri Alley, Vice President for Advancement
Samantha Amick, Advancement Assistant
Sunny Biden, Pat Summitt Foundation, Director for Public Relations
Susan Blair, Board Liaison
Julie Brasfield, Fundholder Relationship Associate
Deane Catani, Director of Communications
Jan Elston, Vice President for Competitive Grant Programs
Dan Foltz-Gray, Coffey Memorial Scholarship Fund, Coordinator
Beth Heller, Director of Scholarship Programs
Trudy Hughes, Director of Regional Development
John Johnson, Financial & Administrative Associate
Jeanette Kelleher, Vice President for Operations
Jackie Lane, Vice President for Communications
Michael McClamroch, President & CEO
Deborah Phillips, Executive Asst. to the President & Office Mgr
Carolyn Schwenn, Executive Vice President & Secretary
Prey Sturgeon, Financial & Administrative Officer
Patrick Wade, Pat Summitt Foundation, Executive Director
Adam Waller, Pat Summitt Foundation, Director for Community Relations
Anna Wiggins, Financial & Administrative Officer

East Tennessee Foundation respects, celebrates, and encourages diversity that positively contributes to our healthy and caring community.