



EAST TENNESSEE FOUNDATION 2009 Annual Record



Our Mission:

East Tennessee Foundation is a public, nonprofit, community foundation created for the purpose of building charitable resources to make communities stronger and lives better through thoughtful giving.



2009 Board of Directors

Left to Right - Front Row: Sherri P. Lee, Cheryl Massingale, Marie F. Alcorn, Betsey R. Bush, Patricia I. Robledo, Ellen B. Fowler, A. David Martin *Back Row:* Larry B. Martin, Charles M. Peccolo, Jr., Richard H. Roberts, J. Kenneth Porter, Frank H. Rothermel, E. Riley Anderson, Frank M. Addicks, Peyton T. Hairston, Jr., Paul G. Willson, Fred D. Womack, Richard A. Davies, Keith H. Burroughs, Mark Cate, Wm. Gregory Hall, Jr., Sam F. Fowler, Jr.

Not Pictured: Williams E. Arant, Jr., Joseph K. Ayres, J. Kay Clayton, Bobbie Y. Congleton, Edwena L. Crowe, Joseph M. Dawson, Natalie L. Haslam, Christine G. Hayworth, Jenny L. Hines, Mark A. Jackson, David P. Jones, Alice A. Mercer, Cynthia M. Moxley, Marian E. Oates, B. Fielding Rolston, Mitchell D. Steenrod, Carol G. Transou, David V. White, Bill G. Williams, Stuart R. Worden

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EAST TENNESSEE FOUNDATION 2009 SUMMARY

Serving as a vehicle for philanthropy, East Tennessee Foundation is a collection of hundreds of individual charitable funds and supporting organizations established by individuals, families, businesses, and other nonprofits and foundations. A wide variety of assets can be accepted to serve almost any charitable purpose. The Foundation is governed by a volunteer Board of Directors composed of leaders from throughout the region and managed by a professional staff. Under the watchful eye of the Board and staff, assets are wisely invested to provide a valuable source of grantmaking dollars for important projects and programs in our region, as well as elsewhere in the nation and the world.

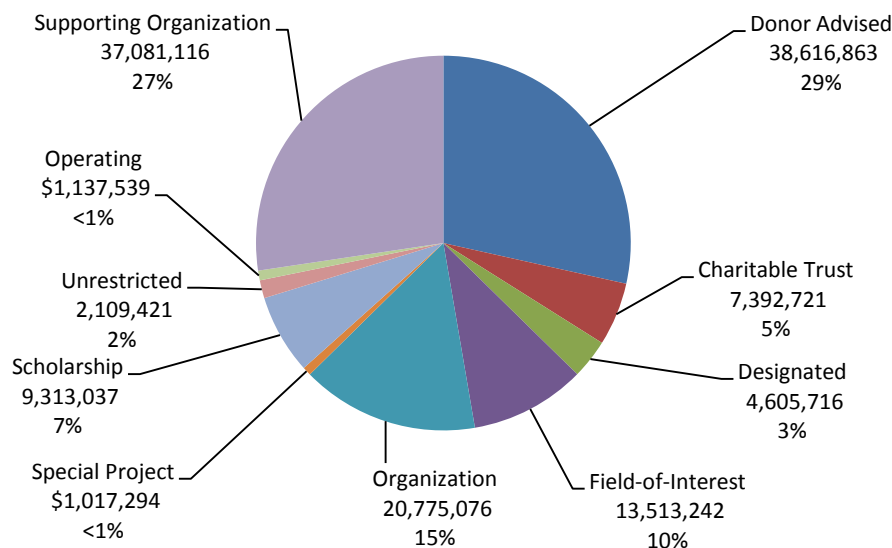
ASSETS:

TOTAL ASSETS	
East Tennessee Foundation and 9 supporting organizations	\$135,562,025
East Tennessee Foundation only (excluding supporting organizations)	\$98,480,909
Supporting organizations: Blalock Family Foundation, Chapman Family Foundation, Clayton Foundation, Cornerstone Foundation of Knoxville, East Tennessee Supporting Foundation, Education Consumers Foundation, Knoxville Jewish Community Family of Funds, Public School Forum of East Tennessee, Shults Family Foundation	\$37,081,116
Change in Total Assets from December 31, 2008	+ 8.75%

FUNDS:

EAST TENNESSEE FOUNDATION FUNDS (excluding supporting organizations)					
Fund Type	#	Amount	Fund Type	#	Amount
Donor Advised	135	\$38,616,863	Unrestricted	6	\$2,109,421
Designated	42	\$4,605,716	Special Project	7	\$1,017,294
Field-of-Interest	35	\$13,513,242	Charitable Trusts	9	\$7,392,721
Scholarship	38	\$9,313,037	Operating	3	\$1,137,539
Organization	70	\$20,775,076	TOTAL	345	\$98,480,909

Assets by Fund Type Total \$135,562,025



GIFTS:

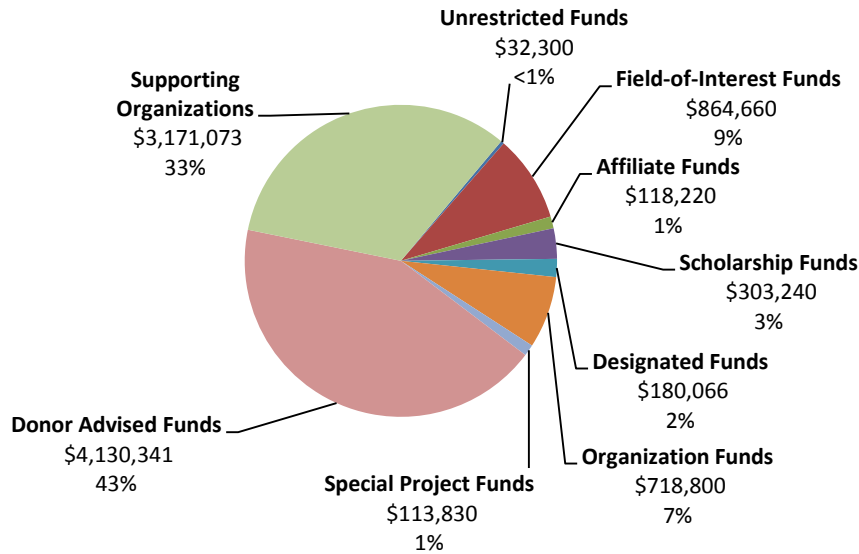
2009 gifts to East Tennessee Foundation and supporting organizations	\$11,729,968
Cumulative gifts from 1986 – 2009 to East Tennessee Foundation	\$260,875,484

GRANTS:

2009 grants from East Tennessee Foundation and supporting organizations	\$9,632,530
2009 grants from East Tennessee Foundation only (excluding supporting organizations)	\$6,461,457
Cumulative grants from 1986 – 2009 from East Tennessee Foundation and supporting organizations	\$169,387,098

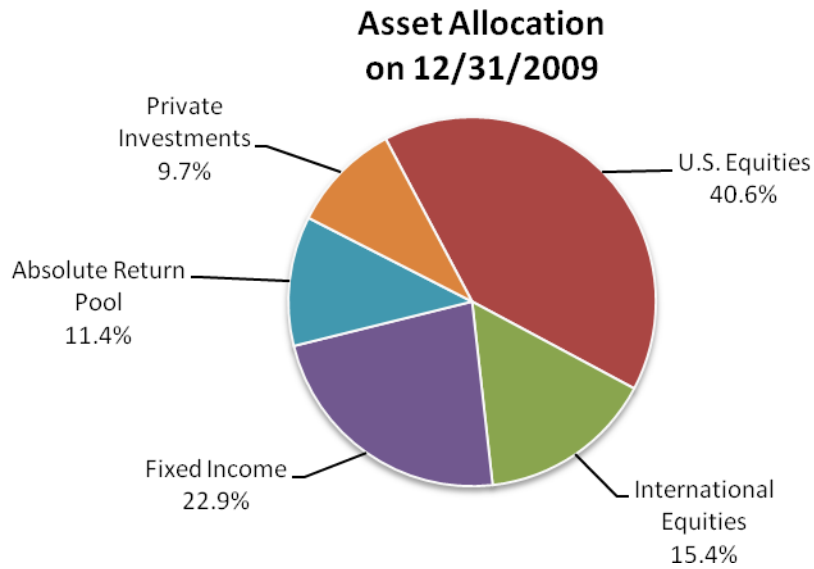
2009 GRANTS BY FUND TYPE	Amount		Amount
Non-Competitive:		Competitive:	
Designated	\$180,066	Field-of-Interest	\$864,660
Organization	\$718,800	County Affiliate	\$118,220
Special Project	\$113,830	Scholarship	\$303,240
Donor Advised	\$4,130,341	TOTAL	\$1,286,120
Unrestricted/Opportunity	\$32,300	Supporting Organization	\$3,171,073
TOTAL	\$5,175,337	TOTAL ALL	\$9,632,530

2009 Grants by Fund Type
Total \$9,632,530



INVESTMENT PERFORMANCE:

EAST TENNESSEE FOUNDATION'S LONG TERM COMMINGLED FUND					
2009	3YR	5YR	10YR	15YR	Since 1 st Qtr. 1987
20.05%	0.68%	4.84%	4.71%	8.54%	8.11%



GOVERNANCE

East Tennessee Foundation 2009 Board of Directors

Officers:

Larry B. Martin - *Chair*

Peyton T. Hairston, Jr. – *Vice Chair*

Jenny L. Hines - *Treasurer*

Michael T. McClamroch - *President (ex-officio)*

Carolyn Schwenn - *Secretary (ex-officio)*

Frank M. Addicks

E. Riley Anderson

Joseph K. Ayres

Betsey R. Bush

Janice K. Clayton

Richard A. Davies

Ellen B. Fowler

Christine G. Hayworth

David P. Jones

Cheryl Massingale

Cynthia M. Moxley

Charles M. Peccolo, Jr.

Richard H. Roberts

B. Fielding Rolston

Mitchell D. Steenrod

Bill G. Williams

Fred D. Womack

Honorary Lifetime Members

Bobbie Y. Congleton

Sam F. Fowler, Jr.

Natalie L. Haslam

A. David Martin

Marie F. Alcorn

Williams E. Arant, Jr.

Keith H. Burroughs

Mark Cate

Edwena L. Crowe

Joseph M. Dawson

Wm. Gregory Hall, Jr.

Mark A. Jackson

Sherri P. Lee

Alice A. Mercer

Marian E. Oates (deceased 7/12/2009)

J. Kenneth Porter

Patricia I. Robledo

Frank H. Rothermel

Carol G. Transou

Paul G. Willson

David V. White

Stuart R. Worden

East Tennessee Foundation Board of Directors' Committees

Executive Committee

Larry B. Martin – *Chair*

Peyton T. Hairston, Jr. – *Vice Chair*

Jenny L. Hines - *Treasurer*

Frank M. Addicks

Marie F. Alcorn

Cheryl Massingale

Charles M. Peccolo, Jr.

B. Fielding Rolston

Investment Committee

Charles M. Peccolo, Jr. – *Chair*
Joseph K. Ayres
Michael C. Crabtree
A. David Martin

Audit Committee

Frank M. Addicks – *Chair*
Williams E. Arant, Jr.
Keith H. Burroughs
Alice A. Mercer

Board Development Committee

Cheryl Massingale – *Chair*
Williams E. Arant, Jr.
Betsey R. Bush
Richard A. Davies
Peyton T. Hairston, Jr.
Jenny L. Hines
A. David Martin
Larry B. Martin
J. Kenneth Porter

Management and Budget Committee

Jenny L. Hines - *Chair*
Joseph M. Dawson
Ellen B. Fowler
B. Fielding Rolston
Mitchell D. Steenrod
Paul G. Willson

Advancement Committee

Peyton T. Hairston, Jr., *Chair*
Keith H. Burroughs
Mark Cate
Natalie L. Haslam
Sherri P. Lee
Larry B. Martin

Past Chairs Advisory Group (in order of service)

David V. White
Natalie L. Haslam
John R. Cooper
Bobbie Y. Congleton
Gregg K. Jones
Larry D. Mauldin
A. David Martin
Joan D. Allen
Lloyd L. Montgomery
James A. Begalla
Ann H. Hansen
J. Daniel Pressley
Mark K. Williams

Communications Advisors

Bill G. Williams – *Chair*
Cynthia M. Moxley
J. Kenneth Porter

FUNDS OF THE FOUNDATION

Donors establish funds at East Tennessee Foundation to serve a wide variety of charitable purposes. These funds are managed separately for accounting, grantmaking, and reporting purposes; however, fund assets are commingled in investments to achieve economies of scale and wide diversification. In 2009, the Foundation held 345 funds.

UNRESTRICTED FUNDS

Unrestricted Funds are "opportunity" funds, allowing the Foundation board and staff to make strategic grants when an opportunity arises. Most Foundation funds are restricted to a particular county, cause, or nonprofit. Unrestricted funds allow the Foundation to support worthwhile requests when an initiative, special need, or community project is identified.

The following is a listing of all Unrestricted Funds during 2009:

Paul O. Dore, Jr., and Betty B. Dore Unrestricted Fund
Marilyn L. Frank Opportunity Fund
Natalie Leach Haslam Fund
Ira O. Johnson Memorial Fund
Opportunity Endowment Fund
Anna G. Schmidt and Barbara M. Landauer Endowment Fund

FIELD-OF-INTEREST FUNDS

Field-of-Interest Funds support a competitive grantmaking process in broad charitable areas such as arts and culture, community development, women and children, education or youth-at-risk. These funds allow the Foundation flexibility in serving a particular need that matches donors' interest.

The following is a listing of all Field-of-Interest Funds during 2009:

Affordable Housing Trust Fund
Arts Fund for East Tennessee
Boyd Youth Education Fund
Butterfly Fund
Frederic and Dorothea King Cady Memorial Trust
Community Investment Fund
Economic Development Fund for East Tennessee
Leadership Education Fund
Literacy Endowment for East Tennessee
Miles for a Child Fund
Oakley and Bruce Moody Fund
Mount Rest Fund
Neighborhoods Small Grants Program
John D. Ogle Cerebral Palsy Research Fund
Respiratory Disease Fund
Rural Communities Initiative Fund
Lydia Seilez Memorial Fund
Ten Year Plan to End Chronic Homelessness Fund
Wildlife Preservation Endowment
Youth Endowment
Youth Endowment Foster Care Scholarship Fund

AFFILIATE FUNDS

Affiliate Funds are field-of-interest funds designated for the benefit of a specific county or geographic area within East Tennessee Foundation's service area. The Foundation's existing affiliate funds range in scope from asset-building or grantmaking programs to full-service, county community foundations. With local advisory boards and a local presence,

affiliate funds may engage in independent endowment building, fundraising activities, grantmaking, and other types of activities to promote local philanthropic giving and community building.

The following is a listing of all County Affiliate Funds during 2009:

Fund for Campbell County
Clinch-Powell Community Fund
Fund for Cocke County
Elizabethton/Carter County Community Foundation Fund
Fund for Etowah and McMinn County
Fund for Greene County
Fund for Greene County Operating Endowment
John D. Grubb and Louise G. Sumner Fund for Monroe County
Harris Fund for Washington County
Johnson County Community Foundation Fund
Kingsport Community Foundation
Rogersville/Hawkins County Education Fund
Fund for Unicoi County
Margaret M. Wachs Youth Leadership Fund

SCHOLARSHIP AND AWARD FUNDS

Scholarship Funds provide competitive scholarship programs for students to obtain postsecondary education. These funds can memorialize a family member, commemorate a graduating class, assist with a particular field of study, benefit students from disadvantaged areas, support students from a particular county, and more. In 2009, \$302,541 was disbursed in scholarship awards for 96 students attending 30 different institutions of higher education.

The following is a listing of all Scholarship and Award Funds during 2009:

B & W Y-12 Scholarship Fund
Coach Jack Blair Scholarship Fund
Ruby A. Brown Memorial Scholarship Fund
Vera and Lawrence Carson Scholarship Fund
Karolyn King Carter Scholarship Fund
Gail Clay Scholarship Fund
Gordon W. and Agnes P. Cobb Scholarship Fund
Steven L. Coffey Memorial Scholarship Fund
Craighead Limestone Scholarship Fund
R. G. and Ruth Crossno Scholarship Fund
Michael Curtin Renaissance Student Memorial Scholarship Fund
Marilyn Davis Music Scholarship Fund
Mickey Forrester Memorial Scholarship Fund
James K. Goldston INFOSEC Scholarship Fund
Greene County Scholarship Program Fund

Michael David Greene Scholarship Fund
 Angie Grubb Scholarship Fund
 John D. Grubb and Louise G. Sumner Fund for Monroe County Scholarship Program
 Jack F. and Edith Updyke Harmon Scholarship Fund
 John Hogin Scholarship Fund
 Mary C. & Joe A. Hollingsworth, Sr. Scholarship Fund
 Johnson County Education Growth Scholarship Fund
 Johnson County Scholarship Fund
 KBA (Knoxville Business Association) Scholarship Fund
 Dr. Richard Forrest and Ella Dudney Kelsey Memorial Scholarship Fund
 Dorsey and Betty King Scholarship Fund
 Knox Central High Class of '50 Alumni Association Scholarship Fund
 Brandy Maples Memorial Scholarship Fund
 McMinn County High School Alumni Fund
 Miller/Vicars Scholarship Fund
 Reuben Louise Cates Mount and Junior Service League of Blount County Memorial
 Scholarship Fund
 Nucleus Knoxville Leadership Scholarship Fund
 Ollie and Floyd Sloan Scholarship Fund
 Stepping-Stone Scholarship Fund
 Teen Town "Pride of the Hill" Scholarship Fund
 Tennessee Judicial Conference Fund
 Debbie Van Cleave Scholarship Fund
 James L. and Brilla Mallicoat Young Scholarship Fund

DESIGNATED ENDOWMENT FUNDS

Designated Funds are endowments established by donors for the benefit of their favorite charities. Designated endowments supply an ongoing source of support for East Tennessee's many nonprofit organizations and provide security and stability to enhance the good work of these organizations.

The following is a listing of all Designated Endowment Funds during 2009:

Agape House Endowment Fund
 Thomas M. and Murray (Midge) Ayres Knox Area Rescue Ministries Fund
 Thomas M. and Murray (Midge) Ayres United Way of Greater Knoxville Fund
 Thomas M. and Murray (Midge) Ayres Webb School of Knoxville Fund
 Howard Baker Portrait Project Fund for the benefit of University of Tennessee Howard H.
 Baker, Jr. Center for Public Policy
 Bonnie P. Blackburn Joni and Friends Knoxville Fund
 Mary H. Bogart Endowment Fund for the benefit of Erwin Presbyterian Church and Care &
 Share Ministry in Erwin, TN (*future interest from charitable remainder trust*)
 John and Elizabeth Bowen Fund for the benefit of Cumberland College in Williamsburg,
 Kentucky (*future interest from charitable remainder trust*)
 CAC Office on Aging Endowment Fund
 CAC Office on Aging - Mobile Meals Fund

Community Health of East Tennessee Foundation Fund
 Community Health of East Tennessee Foundation Fund #2 (nonendowed)
 Community School of the Arts Endowment Fund
 Joseph Delaney Memorial Endowment Fund for the benefit of Volunteers of America
 James A. Dick Endowment Fund for the benefit of Joy of Music, Historic Tennessee
 Theatre Foundation, and Knoxville Symphony (*future interest from charitable remainder trust*)
 Marilyn Dick Endowment Fund (anonymous nonprofit beneficiaries) (*future interest from
 charitable remainder trust*)
 Dobyns-Bennett Baseball Foundation of Kingsport Fund
 Dobyns-Bennett Baseball Foundation of Kingsport Fund #2 (nonendowed)
 Paul O. Dore, Jr., and Betty B. Dore Community Benefit Fund for the benefit of the United
 Way of Greater Knoxville, Westminster Presbyterian Church, Venice Presbyterian
 Church, and Plantation Community Foundation
 Paul O. Dore, Jr., and Betty B. Dore Scholarship Fund for the benefit of Christian Academy
 of Knoxville
 East Tennessee Technology Access Center, Inc. Endowment Fund
 John H. and Carol R. Evans Fund for Choral Music for the benefit of University of
 Tennessee School of Music Choral Activities Fund
 Florence Crittenton Agency Endowment Fund/Julia Anspach
 Russell O. and Fannye Ford Memorial Fund for the benefit of Gloria Dei Lutheran Church
 and New Prospect Presbyterian Church
 Fulton High School Foundation Endowment Fund
 Fulton High School Foundation Fund
 Betty C. Hinton Fund for the benefit of Ramsey House Endowment Fund, Knox Area
 Rescue Ministries, and Webb School Library
 Humane Society Fund for the benefit of the Humane Society of the Tennessee Valley
 Interfaith Health Clinic Fund
 Johnson City Public Library Foundation Fund
 Byrd and King Jones Memorial Fund #1 for the benefit of Bachman Memorial Home and
 the Sweetwater Hospital Association
 Byrd and King Jones Memorial Fund #2 for the benefit of the Sweetwater Hospital
 Association and Hiwassee College
 Hayley Kerr Memorial Fund for the benefit of Halls High School
 David Meriwether Lovett Fund for the benefit of the Arts Fund for East Tennessee and the
 Church of the Ascension
 Maryville College Scholarship Fund
 Mitchel Family Charitable Fund for the benefit of Holston United Methodist Home for
 Children and Free Will Baptist Family Ministries in Greeneville, TN (*future interest from
 charitable remainder trust*)
 Nativity Pageant of Knoxville Endowment Fund
 Sharon Olson Social Ministry Fund for the benefit of the social outreach ministry program
 at Messiah Lutheran Church
 Recording for the Blind and Dyslexic Endowment Fund
 South Doyle High School Foundation Fund for the Future
 Stokely Special Arts Endowment Fund for the benefit of the Stokely Gallery of the
 Knoxville Museum of Art

Tennessee Homeless Animal Care Fund for the benefit of Friends of the Animal Shelter,
Newport, TN

ORGANIZATION/AGENCY ENDOWMENT FUNDS

Organization/Agency Endowments are established by nonprofit organizations for their own benefit, supplying them with an ongoing source of support, security and stability.

The following is a listing of all Organization/Agency Endowment Funds during 2009:

Arrowmont School of Arts and Crafts Agency Endowment Fund
Arrowmont Settlement School of Arts and Crafts Endowment Fund
Boys and Girls Club of the Smoky Mountains Fund
Children's Center of the Cumberlands Fund
Children's Museum of Oak Ridge Agency Endowment Fund
Clinch-Powell Resource, Conservation and Development Council Agency Endowment Fund
Community Health of East Tennessee Endowment Fund
Contact of Oak Ridge Endowment Fund
Dream Connection Fund
East Tennessee Area Agency on Aging Fund
East Tennessee Community Design Center Endowment Fund
East Tennessee Economic Development Agency Fund
East Tennessee Historical Society Endowment Fund
East Tennessee Veterinary Medical Association Fund
Emerald Youth Foundation Fund
Facilities Foundation Fund for the benefit of Baptist Collegiate Ministries
Foothills Land Conservancy Inc. Fund
Fort Kid Playground Endowment Fund
Foundation of Missions Fund for the benefit of Baptist Collegiate Ministries
Friends of Great Smoky Mountains National Park Endowment Fund
Friends of the Knox County Library Fund
Nathanael Greene Museum Agency Endowment Fund
Greeneville Arts Council Endowment Fund
James A. Haslam, II/Leadership Knoxville, Inc. Scholarship Fund
Headmaster's Scholarship Fund for the benefit of Episcopal School of Knoxville
Alvin Herborg and Jane Ann Evans Nielson Endowment Fund for the benefit of Friends of
Knox County Library
Ijams Nature Center Grounds and Garden Endowment Fund
Interfaith Health Clinic Foundation Fund
Junior Achievement - Tri-Cities TN/VA Fund
King College Fund
KCARC (Knox County Association for Retarded Citizens) Endowment Fund
Knox Heritage Preservation Fund
KAMA (Knoxville Academy of Medicine Auxiliary) Health Discovery Fund
Knoxville Area Urban League Fund
Knoxville Chapter of the American Marketing Association Eagle Endowment Fund

Knoxville Community Recreation Band Advancement Group Fund
Knoxville Habitat for Humanity Fund
Knoxville Museum of Art Agency Endowment Fund
Knoxville Museum of Art Endowment Fund
Knoxville Zoo Fund
Legal Aid of East Tennessee Endowment Fund
Little Theatre of Greeneville Memorial Endowment Fund
Martin Trust for the benefit of Historic Rugby
Maryville City Schools Foundation, Inc. Endowment Fund
Ronald McDonald House Endowment Fund
Ronald McDonald House Endowment Fund #2
Historic Middlebrook Preservation Trust Fund
Newport Theatre Guild Endowment Fund
Old Gray Cemetery Endowment Fund
Dr. Alyene Reese Memorial Endowment Fund for the benefit of Mountain Hope Good Shepherd Clinic
Rocky Mount Museum Agency Endowment Fund
Rose Center and Council for the Arts Endowment Fund
Rotary Club of Knoxville Foundation Scholarship Fund
Historic Rugby Endowment Fund
Safe Haven Center Endowment Fund
Second Harvest Food Bank Fund
Sequoyah School PTA Endowment Fund
Shangri-La Therapeutic Academy of Riding ("STAR") Endowment Fund
SOCM Justice Fund for the benefit of Statewide Organizing for Community eMpowerment Resource Project
United Way of Greene County Endowment Fund
United Way of Greater Kingsport, Inc. Endowment Fund
United Way of Greater Knoxville, Inc. Endowment Fund
Webb School of Knoxville Fund
Weekend Academy Chattanooga Agency Endowment Fund
Weekend Academy Knoxville Agency Endowment Fund
Weekend Academy Memphis Agency Endowment Fund
Wellness Community, Knoxville, Inc. Endowment Fund
James White Fort Endowment Fund
YMCA of East Tennessee Endowment Fund
YMCA of Greene County Agency Endowment Fund

DONOR ADVISED FUNDS

Donor Advised Funds offer donors the most flexibility and involvement in their giving by permitting them to make recommendations for grants to qualified nonprofit organizations. Many donors choose a donor advised fund over a family foundation because of the administrative ease and lower cost. Donor advisors enjoy the opportunity to teach philanthropy to their children, both by example and by involving the family in grantmaking. Donor advisors also benefit from the Foundation staff's knowledge of the needs and opportunities for giving in East Tennessee.

The following is a listing of all Donor Advised Funds during 2009:

Advised Fund #2
Advised Fund #5
Advised Fund #6
Advised Fund #8
Advised Fund #9
Advised Fund #11
Advised Fund #12
Advised Fund #14
Akins & Tombras Fund
Albers Family Charitable Fund
Albers Family Perpetual Endowment Fund
Joan D. Allen Fund
Anderson Family Fund
Chase Anderson Fund
Anonymous Fund
Asante Fund
AVRI Fund
David E. Avriett Fund
Ayers Advised Fund
BB&T Fund
Beall Family Fund
Begalla Family Fund
Fred D. Benton Advised Fund
Fred D. Benton Reading Fund
Tom Benton Donor Advised Fund
Bryan and Wilma Jo Blalock Fund
James and Kati Blalock Fund
Sidney A. and JoNelda Williams Blalock Fund
Bonnaroo Works Fund
Boyd Family Fund
Joyce and William Bricker Fund
Burkhart & Company Charitable Fund
Condon S. and Betsey R. Bush Fund
Campbell Family Charitable Fund
C. Howard Capito Donor Advised Fund
Cardiovascular Research of Knoxville Fund
Carey Fund
ChoiceDATA Charitable Fund
Civitan Club Fund
Clayton Family Foundation Fund
Cleverdon Animal Welfare Fund
Community Projects Trust Fund
Conner Family Fund
Consoli Family Foundation Fund

Jean and John Cooper Fund
Craig Foundation Fund
Katherine R. Cunningham Family Fund
Paul O. Dore, Jr., and Betty B. Dore Donor Advised Fund
Driver Family Fund
East Tennessee AIDS Fund
East Tennessee Rural/Medically Underserved and Knoxville Underprivileged Inner-City Youth Fund
Family Investment Fund
John J. Faris and Sondra B. Faris Fund
Marilyn L. Frank Donor Advised Fund
Freshour-McNabb Children's Fund
Harry W. Galbraith & Carolyn W. Galbraith Fund
Bruce and Diane Gibson Christian Ministry Fund
GKTA Donor Advised Fund
Frank and Anna Gray Family Endowment Fund
Frank and Anna Gray Family Fund
Grimes Family Fund
Harris Family Fund
Haslam Family Fund
James A. Haslam III & Susan B. Haslam Donor Advised Fund
Natalie and Jim Haslam Charitable Fund
Michael L. & Leilah M. Hatcher Fund
Dr. Ray M. and Mrs. Christine G. Hayworth Charitable Fund
Health, Education, and Wellness Fund
Hodges Family Charitable Fund
Audrine Honey Donor Advised Fund
Humphreys Barlow Fund
Hundred Year Fund
Hunter Hills Alumni Fund
Igawaga Fund
Samuel and Katherine Jones Fund for Youth
KBA Endowment for the Youth Fund
Kelleher-Sohn Family Fund
Imogene A. King Fund
Knox County Government Foundation Fund for the benefit of Education Summit, First Day Festival, Imagination Library, Read With Me, and Senior Summit
Knoxville High School Alumni Association Fund
Grace Sharp Leech Donor Advised Fund
Lodge Donor Advised Fund
A. David Martin Charitable Fund
A. David Martin Endowment Fund
Martin Charitable Fund
A. C. Masingill, Jr. Fund
Cheryl and Lynn Massingale Family Fund
McElligott Family Foundation Fund

Charles and Alice Mercer Family Fund
Morton Foundation Fund
Scott M. Niswonger Fund
Randall Keith Nutt Fund
Oates Family Trust Fund
Ben F. and Mary L. Oliver Donor Advised Fund
Thomas and Susan Overton Fund
Packard Fund
Donald H. and Carol A. Parnell Charitable Fund
Pferrer-Liles Fund
Richard B. and Jane M. Ray Fund
Reeder Fund
Harry B. Roberts Fund for Education
Louise H. Roberts Fund for Children
Richard H. Roberts Fund
John-David W. Roddy Family Fund
Katherine Collins Roddy and J. P. Roddy, Sr. Fund
Fielding and Joyce Rolston Foundation Fund
Emily and Morton Rose Fund
Greg and Susan Roth Fund
Schroeder Foundation Fund
Evelyn W. and Arthur G. Seymour Fund
Shelby Family Charitable Fund
Edward and Donna Spray Fund
Stewardship Fund
Substance Abuse Fund for Education
Summers Family Fund
Sustainable Future Fund
Swain Family Fund
Dr. Donald and Carole Tarr Fund
THOM Fund
Tweed Fund
TYG Fund
Valentine-Hart Fund for Cocke County
Blanche P. & Emmet P. Vaughn Fund
W. J. M. Family Fund
WALMAC Fund
David Paine Waters FLP Fund
John B. and Patsy Waters Fund
Charlotte S. Watson Charitable Fund
Welch Family Charitable Fund
WHAS Fund
White Fund
Mr. and Mrs. Kent C. Withers Fund
Betsy Worden Memorial Arts Fund
Zellweger Uster, Inc. Fund
Courtney and Kevin Zirkle Family Fund

OPERATING FUNDS

These funds provide an ongoing source of support for the operations of the Foundation.

Fowler Operating Endowment Fund
Operating Fund
Unrestricted Cash Reserves

CHARITABLE TRUSTS AND GIFT ANNUITIES

Charitable Remainder Trusts provide an income for the donor or a family member while providing an up-front tax deduction for the remainder that will be left to the Foundation. Charitable Lead Trusts provide an immediate gift to the Foundation for a period of years with the remainder going back to the donor or family members. Trusts are drawn up by donors' attorneys, but Foundation staff can assist in determining tax savings and the amount of income available to donors. As with other types of gifts, trust assets can establish any type of fund within the Foundation and can be used to benefit the causes that most touch the donor's heart.

The following is a listing of all Charitable Trusts, for which the Foundation is Trustee, and one Gift Annuity during 2009:

Elyse Adamson Charitable Remainder Unitrust
Beall Charitable Trust
Samuel E. Beall, Jr. Charitable Lead Unitrust
Anne P. Church Charitable Remainder Unitrust
Credit Bureau of Knoxville, Inc. Charitable Remainder Unitrust
John Compton French, Sr. Charitable Remainder Annuity Trust
John M. Jones Charitable Remainder Unitrust
W. H. Swain Charitable Remainder Unitrust
Ned Stevenson Williams Gift Annuity

SPECIAL PROJECT FUNDS

The following is a listing of all Special Project Funds during 2009:

75th Suffrage Anniversary Coalition Fund
James Agee Park Fund
Anderson News Co. Literacy Project Fund
Clothesline of Quilts Across Appalachia Project Fund
Handmade in America Model Special Project
knoxAchieves Fund
Museum of American Presidents Fund

GRANTS OF THE FOUNDATION

The primary way East Tennessee Foundation fulfills its mission is through its grantmaking programs. Grants are made on both a competitive and noncompetitive basis, depending on the type of funds from which the grants are made. Competitive grant awards are made to organizations in response to broadly disseminated guidelines and requests for proposals and are awarded according to objective criteria by an experienced grants panels of individuals. Competitive scholarship awards are made to individuals who are deemed the most qualified by scholarship selection committees according to each program's guidelines and application. Noncompetitive grants are made from organization endowment funds or in response to recommendations from fund donor advisors, the Board of Directors, or staff. Grants from the Foundation's supporting organizations are made according to each organization's established policies and criteria for grantmaking. In 2009, the Foundation and its supporting organizations awarded \$9,632,530 in grants or scholarships to nonprofit organizations, primarily in the 25-county region.

GRANTS FROM UNRESTRICTED/OPPORTUNITY FUNDS

Arts and Culture Alliance of Greater Knoxville	\$ 100
Beck Cultural Exchange Center, Inc.	\$ 100
Children's Center of the Cumberland	\$ 500
Coker Creek Economic Development Group, Inc.	\$ 5,250
Community Health of East Tennessee	\$ 5,000
Crutcher Memorial Youth Enrichment Center	\$ 500
Discover Life in America	\$ 1,250
Dollywood Foundation	\$ 100
Family Promise of Blount County, Inc.	\$ 500
Friends of Young-Williams Animal Center	\$ 500
Great Smoky Mountains Institute, Inc.	\$ 100
Helen Ross McNabb Center, Inc.	\$ 100
Heska Amuna Synagogue	\$ 100
Ijams Nature Center	\$ 250
Knoxville-Knox County Community Action Committee	\$ 500
Ladies of Charity	\$ 250
Legal Aid of East Tennessee	\$ 250
Mountain Hope Good Shepherd Clinic, Inc.	\$ 100
Roane County Heritage Commission	\$ 1,500
Rural Resources	\$ 5,250
SafeSpace	\$ 250
Science Hill High School Band Boosters, Inc.	\$ 200
Second Harvest Food Bank of East Tennessee	\$ 250
Southeastern Council of Foundations, Inc.	\$ 5,000
St. Jude Children's Research Hospital	\$ 100
Tribe One	\$ 3,000
University of Tennessee	\$ 1,000

Wellness Community of East Tennessee	\$ 200
Young-Williams Animal Center	\$ 100
Total	\$ 32,300

GRANTS FROM FIELD-OF-INTEREST FUNDS

Affordable Housing Trust Fund

2009 Advisory Board

Craig Griffith - <i>Chair</i>	Jan Evridge - <i>Vice Chair</i>
Marie Alcorn	Mark Brown
Henrietta Grant	Patricia Robledo
Frank Rothermel	Ray Snyder
Becky Wade	Erik Wilson
Annette Winston	

Knox Housing Partnership, Inc.	\$ 2,500
Knoxville Area Urban League	\$112,500
Knoxville Habitat for Humanity	\$100,000
Knoxville-Knox County Community Action Committee	\$175,000
Neighborhood Housing, Inc.	\$ 55,200
Total	\$445,200

Arts Fund for East Tennessee

Two-year continuation grants were awarded in 2008 to support projects occurring through May 1, 2010.

Leadership Education Fund

Mooreland Heights Elementary School	\$ 1,000
Total	\$ 1,000

Mount Rest Fund

2009 Grants Panel

Howard Blum - <i>Chair</i>	Mary Ann Beall
Diane Bremseth	Catherine Brunson
Amy Cathey	Jenny Hines
Christopher Woodhull	Anne Woodle

Big Brothers Big Sisters of East Tennessee	\$ 10,000
Catholic Charities of East Tennessee	\$ 10,000
Crutcher Memorial Youth Enrichment Center	\$ 4,000
East Tennessee Children's Hospital	\$ 2,000
Florence Crittenton Agency	\$ 10,000
Hearing and Speech Foundation	\$ 5,000
InterFaith Health Clinic	\$ 10,000
Knoxville-Knox County Council on Aging	\$ 10,000

Lisa Ross Birth and Women's Center	\$ 10,000
The Ladies of Charity	\$ 10,000
Tribe One	\$ 6,000
Wellness Community of East Tennessee	\$ 3,000
YWCA of Knoxville	\$ 10,000
Total	\$100,000

Neighborhoods Small Grants Program

2009 Grants Panel

Peyton Hairston - <i>Chair</i>	Joe Brandenburg
Randall DeFord	Henrietta Grant
Margo Miller	Bill Murrah
Patricia Robledo	Ragan Schriver
Bill Williams	

Council of Involved Neighborhoods	\$ 2,000
East Tennessee Community Design Center	\$ 3,000
East Tennessee Community Design Center, fiscal sponsor for:	
Burlington Homeowners and Residents Association	\$ 500
Dandridge Avenue Neighborhood Watch	\$ 3,000
Edgewood Park Neighborhood Association	\$ 500
Fountain City Town Hall	\$ 360
Isabella Towers Resident Association	\$ 2,400
Lake Forest Neighborhood Association	\$ 1,300
Lyons View Community Club	\$ 3,000
Mechanicsville Community Association	\$ 3,000
Northgate Terrace Resident Association	\$ 3,000
Old Sevier Community Group	\$ 1,400
Pond Gap Neighborhood Association	\$ 500
Prospect Place Neighborhood Watch	\$ 500
Legacy Parks Foundation	\$ 2,000
Oakwood-Lincoln Park Neighborhood Association	\$ 1,500
Old North Knoxville, Inc	\$ 1,500
Parkridge Community Organization	\$ 1,500
Total	\$ 30,960

Ten Year Plan to End Chronic Homelessness Fund

2009 Advisory Board

Jon Lawler, <i>Coordinator</i>	Roger Nooe
Mintha Roach	Frank Rothermel
Laurens Tullock	

Compassion Coalition	\$ 60,000
University of Tennessee	\$100,000

Volunteer Ministry Center	\$102,500
Total	\$262,500

Youth Endowment

Two-year continuation grants were awarded in 2008 to support projects occurring through June 1, 2010.

Blount County Children's Advocacy Center	\$ 25,000
Total	\$ 25,000

Total Field-Of-Interest Fund Grants **\$864,660**

GRANTS FROM COUNTY AFFILIATE FUNDS

Elizabethton/Carter County Community Foundation

2009 Advisory Board

Helen Wilson - <i>Chair</i>	Terry Holley - <i>Ex Officio</i>
Thom Burleson	Evelyn Ellis Elder
Pat Green	Pam Huber
Sam LaPorte	Norma Tetrick
Charles Voncannon	Donna Whittamore
Jim Wilson	

No grant awards made from the Elizabethton/Carter County Community Foundation in 2009.

Fund for Greene County

2009 Advisory Board

Kidwell King, Jr. - <i>Chair</i>	Terry Holley - <i>Ex Officio</i>
Carla Bewley	Benjamin Brooks
Susan Holzschuh	Gregg Jones

Only scholarship awards made in 2009 (included in Grants from Scholarship Funds).

John D. Grubb & Louise G. Sumner Fund for Monroe County

2009 Advisory Board

Barbara Arwood - <i>Chair</i>	Patsy Carson
Julianne Diehl	Terry Holley
Wanda Littreal	Sue Orr

American Red Cross - Monroe County Chapter	\$	3,500
Boys and Girls Club of the Monroe Area	\$	4,000

City of Sweetwater	\$	500
Cleveland State Community College Foundation	\$	3,500
Coker Creek Economic Development Group, Inc.	\$	4,000
Douglas-Cherokee Economic Authority, Inc.	\$	8,000
Florence Crittenton Agency	\$	1,000
Fort Loudon Association	\$	2,600
Girl Scout Council of the Southern Appalachians	\$	4,000
Good Shepherd Center	\$	4,000
Monroe Area Council for the Arts	\$	2,000
Monroe Area School for the Performing Arts, Inc.	\$	1,900
Monroe County Beautiful, Inc.	\$	2,200
Monroe County Community Health Access Committee	\$	2,000
Rural Vale Elementary School	\$	600
Senior Citizens Home Assistance Service, Inc.	\$	4,000
Sequoyah Birthplace Museum	\$	4,000
Spay/Neuter Assistance for Pets, Inc.	\$	4,000
Sweetwater Valley Citizens for the Arts	\$	3,500
Women's Wellness and Maternity Center	\$	2,400
Total	\$	61,700

Harris Fund for Washington County

2009 Advisory Board

Carol Transou - <i>Chair</i>	Phillip Carriger
Carol Ferguson	Terry Holley
Allan Spritzer	

Academy of Strings	\$	2,000
CASA of Northeast Tennessee	\$	1,500
Coalition for Kids, Inc.	\$	1,500
David Crockett High School	\$	3,000
East Tennessee Regional Symphony	\$	2,000
Fairmont Elementary School	\$	2,000
First Tennessee Human Resource Agency	\$	1,000
Frontier Health	\$	1,000
Girls Incorporated of Johnson City/Washington County	\$	4,000
Good Samaritan Ministries, Inc.	\$	2,500
Hands On! Regional Museum	\$	2,500
Johnson City Area Arts Council	\$	500
Keystone Dental Care, Inc.	\$	1,000
Mountain View Elementary School	\$	700
Neighborhood Reconciliation Services, Inc.	\$	1,500
Rocky Mount Historical Association	\$	2,000
Science Hill High School Band Boosters, Inc.	\$	1,800
Second Harvest Food Bank of Northeast Tennessee	\$	1,500

Small Miracles Therapeutic Horseback Riding Center, Inc.	\$	2,000
Total	\$	34,000

Johnson County Community Foundation

2009 Advisory Board

Minnie Miller - <i>Chair</i>	Betty Brown - <i>Vice Chair</i>
Barbara Seals - <i>Secretary</i>	Terry Holley - <i>Ex Officio</i>
Cloyce Eller	Joe Herman
Debbie Humphrey	Sam Icenhour
Ollie Phipps	Donald Tarr
Peter Wachs	

Grants from the Johnson County Education Growth Scholarship Fund included in Grants from Scholarship Funds.

Appalachia Service Project, Inc.	\$	500
Heritage Hall, Inc.	\$	1,000
Johnson County High School (from Margaret M. Wachs Youth Leadership Fund)	\$	1,350
Johnson County Humane Society, Inc.	\$	1,000
Johnson County School System	\$	500
Johnson County Senior Center	\$	1,000
Mountain City Elementary School	\$	680
Roan Creek Elementary School	\$	990
Shady Valley Cranberry Festival, Inc.	\$	500
Total	\$	7,520

Kingsport Community Foundation

2009 Advisory Board

Fielding Rolston - <i>Chair</i>	Jeff Byrd - <i>Vice Chair</i>
Teresa Estep - <i>Secretary</i>	Terry Holley - <i>Ex Officio</i>
Julie Bennett	Wallace M. Boyd, Jr.
John Cahill	Shelbourne Ferguson
Tony Hewitt	Patrick Kane
Cee Gee McCord	Mr. Olan Jones
Paul Montgomery	Mr. Michael D. Stice
Mr. Frederick E. Wallin	Al Wargo

Grants from Dobyys-Bennett Baseball Foundation Fund and Kingsport Renewal: The Spirit Campaign Funds included in Grants from Designated Funds.

Arts Council of Greater Kingsport, fiscal sponsor for KingsportARTS	\$	1,000
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Big Brothers Big Sisters of East Tennessee	\$	700
Boys and Girls Club of Greater Kingsport, Inc	\$	1,000
Friends In Need Health Center, Inc.	\$	1,500
Frontier Health	\$	2,000
Girl Scouts of the Appalachian Council, Inc.	\$	2,000
Girls Incorporated of Kingsport	\$	2,000
Literacy Council of Kingsport	\$	1,200
Small Miracles Therapeutic Horseback Riding Center, Inc.	\$	1,500
South Central Kingsport Community Development	\$	1,100
Teen Center Coalition, Inc.	\$	1,000
Total	\$	15,000

Total Affiliate Fund Grants **\$ 118,220**

GRANTS FROM SCHOLARSHIP FUNDS

Art Institute of Chicago	\$	1,500
Austin Peay State University	\$	8,500
Boston University	\$	7,500
Carson-Newman College	\$	5,500
Cleveland State Community College	\$	2,000
East Tennessee State University	\$	30,473
Freed-Hardeman University	\$	10,000
Indiana University	\$	1,500
King College	\$	12,500
Lee University	\$	2,750
Maryville College	\$	20,000
Middle Tennessee State University Foundation	\$	8,000
Central High School	\$	500
Milligan College	\$	3,000
Nashville School of Law	\$	2,000
The Ohio State University	\$	1,000
Pellissippi State Community College	\$	8,300
Rhodes College	\$	3,000
Roane State Community College	\$	13,567
Sewanee - The University of the South	\$	10,000
Tennessee Technological University	\$	6,900
Tennessee Wesleyan College	\$	4,750
Tusculum College	\$	7,500
University of Florida-Gainesville	\$	7,500
University of Memphis School of Law	\$	2,000
University of Tennessee, Chattanooga	\$	4,750
UT College of Law	\$	1,000
University of Tennessee	\$	90,500
Vanderbilt University	\$	7,500
Vanderbilt University Law School	\$	1,000

Virginia-Intermont College	\$ 7,500
Walters State Community College	\$ 3,250
Yale University	\$ 7,500
Total	\$ 303,240

New Scholarship Recipients for 2009 by Scholarship Fund

B & W Y-12 Scholarship

Megan Carroll, Anderson County, *Roane State Community College (RSCC)*

Coach Jack Blair Scholarship

Connor Hall, Greene County, *University of Tennessee-Chattanooga (UTC)*
 Jeana Medlin, Greene County, *University of Tennessee-Knoxville (UTK)*

Ruby A. Brown Memorial Scholarship

Lena Thompson, Grainger County, *Walters State Community College*

Vera and Lawrence Carson Scholarship

Merita Pierce, Scott County, *Tennessee Technological University*

Karolyn King Carter Scholarship

Blake Hebert, Greene County, *Art Institute of Chicago*

Gail Clay Scholarship

Jeminaka Norton, Knox County, *Pellissippi State Community College (PSCC)*

Gordon W. and Agnes P. Cobb Scholarship

Molly Hunt, Blount County, *UTK*
 Adam Patterson, Blount County, *Maryville College*
 Joseph Hunter Tipton, Blount County, *UTK*

Steven L. Coffey Memorial Scholarship

Rachel Bullock, Anderson County, *PSCC*
 Megan Davis, Anderson County, *RSCC*
 Kayla Sewell, Anderson County, *PSCC*
 Sarah Walker, Anderson County, *PSCC*
 Tracie Meares, Anderson County, *PSCC*

Craighead Limestone Scholarship

Dylan Moser, Monroe County, *UTK*

R. G. Crossno Memorial Scholarship

Wesley Vines, Anderson County, *PSCC*
 Samantha Yellen, Anderson County, *RSCC*

Michael Curtin Renaissance Student Memorial Scholarship

Brad Shear, Anderson County, *Ohio State University*

Marilyn Davis Music Scholarship

Matthew Brickney, Sullivan County, *East Tennessee State University*

Greene County Scholarship Program

Lacy-Jay Bowman, Greene County, *UTK*

Michael David Greene Memorial Scholarship

James Marcus Jeter, Knox County, *UTK*
Steven Lawhon, Knox County, *Indiana University*
Brianna White, Knox County, *UTK*

Jack F. and Edith Updyke Harmon Scholarship

Patrick Jones, Tennessee Bristol High School, *King College*

Mary C. and Joe A. Hollingsworth, Sr. Scholarship

Megan Carroll, Anderson County, *RSCC*
Elliott Cooper, Anderson County, *UTK*

Johnson County Education Growth Scholarship

Molly Henson, Johnson County, *Milligan College*
Jordan Kinser, Johnson County, *Milligan College*

Johnson County Scholarship

Hannah Alleman, Johnson County, *Boston University*
Billie Jennings, Johnson County, *Tusculum College*
Tara Mahan, Johnson County, *Virginia-Intermont College*
Christina Maurice, Johnson County, *University of Florida-Gainesville*

Dr. Richard Forrest and Ella Dudney Kelsey Memorial Scholarship

Angie Tsay, Shelby County, *UTC*

Dorsey and Betty King Scholarship

Rebekah Evans, Campbell County, *Carson-Newman College*

Knox Central High Class of '50 Alumni Association Scholarship

Amanda Fields, Knox County, *UTK*
Jessica Newman, Knox County, *Rhodes College*
Jon Miller, H.G. Loy Teacher Award

Knoxville Business Association Scholarship

Dino Muftic, Knox County, *UTK*

Brandy Maples Memorial Scholarship

Kathryn Clift, Knox County, *Carson-Newman College*

Miller/Vicars Scholarship

William Godsey, Hawkins County, Virginia, *UTC*

John D. Grubb and Louise G. Sumner Fund for Monroe County Scholarship

Lynn Alexandria Brown, Monroe County, *Carson-Newman College*
Christopher Gibson, Monroe County, *Tennessee Wesleyan College*
Christina Hawk, Monroe County, *UTK*
Anthony Raper, Monore County, *UTK*

Reuben Louise Cates Mount and the Junior Service League of Blount County Memorial Scholarship

Katelyn Howard, Blount County, *UTK*

Teen Town "Pride of the Hill" Scholarship

Morgan Buchanan, Washington County, *UTC*
Andrew Kerr, Washington County, *Austin Peay State University*

Tennessee Judicial Conference Foundation Scholarship

Nashville School of Law, Judge Joseph S. Daniel Award: Joshua Hankins, Davidson County
Nashville School of Law, Suzanne G. Keith Award: Sheila Freeze, Coffee County
University of Memphis School Of Law, Judge William H. Williams Award: Omar Malik, Shelby County
University of Memphis School of Law, Dr. Benajmin Hooks Award: Anne Davis, Shelby County
UTK College of Law, Judge Houston M. Goddard Award: Heather Graves, Knox County
UTK College of Law, Robert W. Ritchie Award: Bryan Hathorn, Knox County
Vanderbilt Univeristy Law School, Justice Frank F. Drowota, III Award: Tyler Hagenbuch, Davidson County

GRANTS FROM DESIGNATED FUNDS

Agape, Inc.	\$ 16,019
Association for the Preservation of Tennessee	
Antiquities for the benefit of Ramsey House	\$ 2,785
Bachman Academy	\$ 3,715
Christian Academy of Knoxville	\$ 1,905
Community School of the Arts	\$ 2,034
Dobyns-Bennett High School	\$ 4,182
East Tennessee Technology Access Center	\$ 2,283
Episcopal Church of the Ascension	\$ 286
Florence Crittenton Agency	\$ 498
Fulton High School	\$ 39,446
Gloria Dei Lutheran Church	\$ 1,637
Halls High School	\$ 601
Hiwassee College	\$ 2,152
Humane Society of the Tennessee Valley	\$ 2,506
InterFaith Health Clinic	\$ 4,795
Joni and Friends Knoxville	\$ 6,305
Knox Area Rescue Ministries	\$ 4,454
Knoxville Museum of Art	\$ 7,557
Knoxville-Knox County	
Community Action Committee	\$ 713
Maryville College	\$ 29,247
Messiah Lutheran Church	\$ 5,046
New Prospect Presbyterian Church	\$ 546
Plantation Community Foundation, Inc.	\$ 475
Recording for the Blind and Dyslexic	\$ 2,284
South Doyle High School Foundation	\$ 16,396
Sweetwater Hospital Association	\$ 5,867
United Way of Greater Knoxville	\$ 4,754
Venice Presbyterian Church	\$ 1,901
Volunteers of America of Tennessee	\$ 4,515
Webb School of Knoxville	\$ 2,785
Westminster Presbyterian Church	\$ 2,377
Total	\$ 180,066

GRANTS FROM ORGANIZATION FUNDS

Baptist Collegiate Ministry	\$ 150,000
Children's Museum of Oak Ridge	\$ 1,877
East Tennessee Historical Society	\$ 6,159
Emerald Youth Foundation	\$ 4,972
Foothills Land Conservancy, Inc.	\$ 1,057
Greeneville Arts Council, Inc.	\$ 1,715
Historic Rugby, Inc.	\$ 13,100
Ijams Nature Center	\$ 5,474
James White's Fort Association	\$ 434
Junior Achievement - Tri-Cities TN/VA	\$ 48,329
Knox County Association for Retarded Citizens	\$ 250,000
Knoxville Chapter of the American Marketing Association	\$ 4,000
Knoxville Habitat for Humanity	\$ 4,665
Knoxville Museum of Art	\$ 5,654
Leadership Knoxville, Inc.	\$ 2,150
Maryville City Schools Foundation, Inc.	\$ 39,214
Ronald McDonald House Charities of Knoxville	\$ 80,000
Wellness Community of East Tennessee	\$ 100,000
Total	\$ 718,800

GRANTS FROM SPECIAL PROJECT FUNDS

Pellissippi State Community College	\$ 83,254
Roane State Community College	\$ 18,269
Walters State Community College	\$ 12,307
Total	\$ 113,830

GRANTS FROM DONOR ADVISED FUNDS

The following organizations received \$4,130,341 in grants from donor advised funds:

4 Market Square	A Voice for the Children
The Access Fund	The Actors Fund of America
Alive Hospice	Alzheimer's Association, Eastern TN Chapter
The American Alpine Club	American Cancer Society-Knoxville
American Heart Association, Inc.	American Junior Golf Association
American Red Cross	American Rivers, Inc.
Appalachian Voices	Appalshop, Inc.
Arrowmont School of Arts and Crafts	Arthritis Foundation, East Tennessee Branch
Arthritis Foundation of Tennessee	Association for Research and Enlightenment, Inc.
Attorneys for the Rights of the Child	Barter Foundation Incorporated State Theatre
The Baylor School	Big Brothers Big Sisters of East Tennessee
Bijou Theatre Center	Birmingham-Southern College
Black Mountain Center for the Arts	Blount Mansion Association
Blount Memorial Foundation for Medical Care, Inc.	Boy Scouts of America/Great Smoky Mtn. Council #557
Boy Scouts of America/Sequoyah Council	Boys and Girls Club of Greeneville & Greene County
Boys and Girls Clubs of the Tennessee Valley	Cable Center
Campus Crusade for Christ	CARE
Carilion Hospice Services of New River Valley	Carson-Newman College
Casa de Sara	Catholic Charities of East Tennessee

Central Baptist Church of Bearden
 Children's Center of Knoxville, Inc.
 Church of the Savior - United Church of Christ
 Coalition for Kids, Inc.
 Colorado Criminal Justice Reform Coalition
 Community Shares
 Counseling and Consultation Services, Inc.
 Cross Point Ministries, Inc.
 Cumberland Communities Communications Corporation
 Roman Catholic Diocese of Knoxville
 Duke University
 Earth Island Institute
 East Tennessee Historical Society
 East Tennessee State University Foundation
 Emerald Youth Foundation
 Feeding America
 First Baptist Church of Sevierville
 First Cumberland Presbyterian Church, Knoxville
 Florida Keys Wild Bird Rehabilitation Center, Inc.
 Foothills Land Conservancy, Inc.
 Fort Sanders Foundation
 Free Medical Clinic of America
 Friends of the Knox County Library
 Friends of Young-Williams Animal Center
 Girls Incorporated of Kingsport
 Great Smoky Mountains Institute, Inc.
 Greeneville Arts Council, Inc.
 Greeneville Cumberland Presbyterian Church
 Harrison-Chilhowee Baptist Academy
 Heifer Project International
 Helen Ross McNabb Foundation
 Historic Tennessee Theatre Foundation
 Holy Ghost Catholic Church
 Hope Resource Center
 Hotchkiss School
 Humane Society of the Tennessee Valley
 Institute for Environmental Innovation
 International Republican Institute
 Jenny Wiley Theatre
 John C. Campbell Folk School
 Joni and Friends Knoxville
 Junior Achievement of East Tennessee, Inc.
 Kentucky Coalition, Inc.
 King College
 Knox County Government
 Knox Youth Sports, Inc.
 Knoxville Catholic High School
 Knoxville-Knox County Office on Aging
 Knoxville Museum of Art
 Knoxville Symphony Society
 Kosciuszko Foundation
 Leave No Trace, Inc.
 Legal Aid of East Tennessee
 Lincoln Memorial University
 Loudon County Habitat for Humanity
 Lyons Creek Baptist Church

Child Advocacy Center of the Third Judicial District
 Christian Leadership Concepts (CLC)
 Church Street United Methodist Church
 Cokesbury United Methodist Church
 Common Ground Relief
 Cornerstone Schools Association
 The Cross (Greek Christian Ministries)
 Crutcher Memorial Youth Enrichment Center
 Cure Finders, Inc.
 Dogwood Arts Festival, Inc.
 Eagle Ranch
 East Tennessee Children's Hospital
 East Tennessee Public Communications Corporation
 Eastern Kentucky University Foundation
 Episcopal School of Knoxville
 First Baptist Church of Knoxville
 First Christian Church, Cumming, GA
 Florence Crittenton Agency
 Focus on the Family
 Fort Loudon Lake Association
 Foundation for Evangelism
 Friends of Great Smoky Mountains National Park
 Friends of Literacy, Inc.
 George West Mental Health Foundation
 Global Water Challenge
 Great Smoky Mountain Heritage Center, Inc.
 Greeneville City Schools Foundation
 Greeneville Soccer Association
 HeadCount
 Helen Ross McNabb Center, Inc.
 Hickory Valley Christian School, Inc.
 Holly Grove Baptist Church
 Hope Community Church of Knoxville, Inc.
 Hospitality Pantries, Inc.
 Humane Society of Jefferson County
 Ijams Nature Center
 InterFaith Health Clinic
 Intersarsity Christian Fellowship USA
 John Austin Cheley Foundation
 Jonesville United Methodist Church
 Joy of Music Youth Music School
 Junior League of Knoxville, Inc.
 Kentucky Waterways Alliance
 Knox Area Rescue Ministries
 Knox Heritage, Inc.
 Knoxville Botanical Gardens and Arboretum
 Knoxville Habitat for Humanity
 Knoxville Leadership Foundation
 Knoxville Opera Company
 Knoxville-Knox County Community Action Committee
 Leadership Sevier, Inc.
 Legacy Parks Foundation
 Lesbian and Gay Community Services Center, Inc.
 Little Kids Rock, Inc.
 Love Kitchen, Inc.
 Maryville College

Mayo Clinic
The Medical Foundation of North Carolina, Inc.
Methodist Medical Center Foundation
Michigan State University
Mission of Hope
Mountain Comprehensive Care Center
Museum of Appalachia
National Christian Foundation
National Recreation and Park Foundation
Nativity Pageant of Knoxville
Nature Conservancy, Tennessee Chapter
New Hope Academy
NOAH'S ARC, Inc.
Operation Inasmuch, Inc.
Pace Academy, Inc.
Paulist Fathers
Philadelphians, Inc.
Pikeville Area Family YMCA
Project GRAD Knoxville, Inc.
Remote Area Medical Foundation
The Rotary Foundation of Rotary International
The Royal Oak Foundation
Safe Haven Center
Samaritan's Purse
Senior Citizens Home Assistance Service, Inc.
Second Presbyterian Church
Sequoyah Hills Presbyterian Church
Sevier County Youth Center, Inc.
Sigma Alpha Epsilon Foundation
Sisters of Notre Dame
Southern Appalachian Highlands Conservancy
Southern Foodways Alliance
St. James Episcopal Church
St. John's Episcopal Church, Johnson City
St. Jude Children's Research Hospital
Students Taking A Right Stand (STARS)
Sustainable South Bronx
Tennessee FFA Foundation, Inc.
Tennessee Wesleyan College
Thompson Cancer Survival Center Foundation
Times Up, Inc.
Trinity Classical School, Inc.
United Nations Foundation
United Way of Greater Knoxville
United Way of Roane County
United Way of Washington County
University of Chicago
University of Michigan UCLL
University of Notre Dame
University of Tennessee
Volunteer Ministry Center
Walker County Department of Education
Webb School of Knoxville
West Greene High School
Whitney Museum of American Art
World Vision, Inc.

McMinn County Living Heritage Museum
Mercy Health Partners Foundation
Metropolitan Drug Commission
Middlebrook Pike United Methodist Church
Morehead-Cain Scholars Program
Murray State University Foundation
National Alliance of the Mentally Ill of Knoxville
National Kidney Foundation Serving East Tennessee
National Trust for Historic Preservation
Nature Conservancy, North Carolina Chapter
Naval Order of the United States Foundation
Niswonger Performing Arts Center
Oneida Special School District
Orbit Village Project
Partners In Health
Pellissippi State Foundation
Piedmont Orthopedic Foundation
Plateau Home School Learning Center
Rachel's Lament
Rock the Earth
Rotary Foundation of Knoxville
Safe Harbor Child Advocacy Center, Inc.
Salvation Army
Sandy Valley Habitat for Humanity
Second Harvest Food Bank of East Tennessee
Sequoyah Elementary Foundation
Sevier County Humane Society
Shangri-La Therapeutic Academy of Riding (STAR)
Siskin Children's Institute
Smile Train, Inc.
Southern Environmental Law Center
Spay/Neuter Assistance for Pets, Inc.
St. John's Cathedral
St. John's Lutheran Church
St. Thomas the Apostle Parish
Susan G. Komen Breast Cancer Foundation (Knoxville)
Tennessee Clean Water Network
Tennessee Stage Company
Theatre Knoxville Downtown
Timber Ridge Presbyterian Church
Trinity Children, Inc.
Union Theological Seminary
United Way of Blount County
United Way of Greene County, Inc.
United Way of Sevier County
University Health System, Inc.
Univerisity of Michigan
University of Mississippi Medical Center
University of Texas Foundation, Inc.
Vida Verde Nature Education
VSA arts Tennessee
Walters State Community College Foundation
Wellness Community of East Tennessee
Westover School
Winrock International
WorldTeam

Worldwide Discipleship Association, Inc.
 Yale University
 YMCA of East Tennessee
 Young Life of Asheville and Buncombe County
 Young Life of Murfreesboro
 Young-Williams Animal Center

Wycliffe Bible Translators, Inc.
 Yellowstone Park Foundation
 Young Life (Headquarters)
 Young Life of Greater Knoxville
 Young Life of Williamson County
 YWCA of Knoxville

**TOTAL GRANTS FROM COMPONENT FUNDS
 OF THE FOUNDATION** **\$ 6,461,457**

**TOTAL GRANTS FROM SUPPORTING
 ORGANIZATIONS** (see pages 29-32) **\$ 3,171,073**

TOTAL GRANTS – ALL ENTITIES **\$ 9,632,530**

SUPPORTING ORGANIZATIONS

East Tennessee Foundation’s supporting organizations are separate 501(c)(3) entities, established by trust or charter, that qualify as public charities because they have a close relationship with the Foundation (the supported organization). To be categorized as a public charity, supporting organizations are described in internal revenue code section 509(a)(3), and must have a particular type of structural relationship with the supported organization. East Tennessee Foundation’s supporting organizations, as below listed, are classified as Type 1 supporting organizations, whereby the Foundation’s Board of Directors appoints a majority of the board members of each of the supporting organizations. The Foundation has the following supporting organizations:

BLALOCK FAMILY FOUNDATION was established as a supporting organization in 1999 for educational, religious, literary and charitable purposes and will primarily benefit citizens of Sevier County and the East Tennessee region.

2009 Board of Directors

Sidney Blalock - <i>Chair</i>	Douglas Blalock
James Blalock	R. W. Brooks
Charles Kidd	George Pelfrey
Wes Stowers	

Total Assets on 12/31/2009 = \$ 315,027 Total grants awarded in 2009 = \$ 2,600

CHAPMAN FAMILY FOUNDATION was created in 2003 through a testamentary gift from Robert G. Chapman for educational, religious, literary, and charitable purposes in accordance with the purposes, goals, objectives and priorities of East Tennessee Foundation.

2009 Board of Managers

Jefferson Chapman - <i>Chair</i>	Catherine Chapman Biggs
Dan Holbrook	Jennie Chapman Linthorst
James Martin	Sharon Miller Pryse
Elisabeth Rukeyser	

Total Assets on 12/31/2009 = \$ 1,592,432 Total grants made in 2009 = \$92,500

CLAYTON FOUNDATION was created in 2003 for educational, religious, and charitable purposes in accordance with the purposes, goals, objectives and priorities of East Tennessee Foundation. In this connection, the Clayton Foundation intends: (a) to benefit the public through programs and activities that encourage community-building, leadership, personal development, and individual responsibility; (b) to encourage community and economic development in and around Knoxville, Tennessee and other communities in the State of Tennessee; and, (c) to promote consensus and encourage broad based charitable giving by increasing cooperation between charitable foundations, state, local and federal governments, private businesses and individuals.

2009 Board of Directors

James Clayton - *President*
Hallerin Hill
Larry Martin

Kevin Clayton
Raja Jubran

Total assets on 12/31/2009 = \$ 20,468,260 Total grants made in 2009 = \$ 50,000

CORNERSTONE FOUNDATION OF KNOXVILLE was established with the purpose of serving as a catalyst for Knoxville to reach its God-given potential as a community. It is proactive in seeking out programs, projects, and partners that further its current strategic priorities, including long-term investment in children, community oriented leadership development and support, and partnership initiatives. It also manages Two Rivers Pavilion, a facility available for use by nonprofit organizations, churches, youth groups, and community organizations and owns 4MS, LLC, a multi-faceted economic development initiative in downtown Knoxville.

2009 Board of Directors

Dell Lawler - *Chair*
Renda Burkhart
David Martin

Rodney Lawler – *Secretary*
William Haslam

Total assets on 12/31/2009 = \$9,861,647 Total grants made in 2009 = \$ 2,878,789

EAST TENNESSEE SUPPORTING FOUNDATION was created in 1994 to accept gifts of real estate for East Tennessee Foundation.

2009 Board of Directors

Lloyd Montgomery - *Chair*
Michael McClamroch - *President, (Ex officio)*
Maribel Koella
David Martin
Kenneth Porter

Daniel Pressley –*Treasurer*
Carolyn Schwenn - *Secretary, (Ex officio)*
Rodney Lawler
Marian Oates (deceased, July 2009)

Total assets on 12/31/2009 = \$1,036,192 Total grants made in 2009 = \$ 0

EDUCATION CONSUMERS FOUNDATION was created in 2005 to advance the interests of parent groups, school boards, college trustees, legislative committees, and civic organizations by gathering and disseminating information about education policy and practice.

Board of Directors

J.E. Stone - <i>President</i>	George Cunningham
Henrietta Grant	Mark Herring
Ann Mactier	Marilyn Reed
Robert Spangler	

Total assets on 12/31/2009 = \$1,456,040 Total grants made in 2009 = \$ 36,000

KNOXVILLE JEWISH COMMUNITY FAMILY OF FUNDS was created as a supporting organization in 1999 and will support and enhance the aims and goals of the Jewish community in East Tennessee and contribute to the quality of life and culture in the U.S.

Board of Directors

Richard Jacobstein - <i>President</i>	Bernard Rosenblatt - <i>Vice President</i>
Scott Hahn - <i>Secretary/Treasurer</i>	Jeff Gubitz - <i>Ex Officio</i>
Jeffrey Becker	Bernard Bernstein
Arnold Cohen	Robert Goodfriend
Herbert Jacobs	Harold Markman
Pace Robinson	Alexandra Rosen
Mary Linda Schwarzbart	Melvin Sturm

Total assets on 12/31/2009 = \$1,902,526 Total grants made in 2009 = \$98,684

PUBLIC SCHOOL FORUM OF EAST TENNESSEE was created in 2002 to support public education in a multi-county area in Middle East Tennessee, including but not limited to Anderson, Blount, Grainger, Jefferson, Knox, Loudon, Roane, Sevier and Union counties. It will support initiatives that: 1) create passion for excellence, community support and positive change within the school systems; 2) build strong school leadership; 3) are supported by measurable data and the attainment of critical results based on improved student achievement; and, 4) support development of excellent teachers.

Board of Directors

Gordon G. Fee - <i>Co-Chair</i>	Oliver Thomas - <i>Co-Chair</i>
Pearl Coffey - <i>Secretary</i>	Lynn Cagle
Hardy DeYoung	David Dotson
Mike Edwards	James Haslam, II
William Locke	Paul Montgomery
Richard Ray	Billy Stair
Laurens Tullock	

Total assets on 12/31/2009 = \$59,219 Total grants made in 2009 = \$ 12,500

SHULTS FAMILY FOUNDATION was created in 1998 with the future remainder interest from a charitable remainder unitrust and will provide for the education, health and religious needs of citizens of Cocke County, Tennessee.

Board of Trustees

- | | |
|-------------------|--------------------|
| Roy Campbell, Jr. | Mary Ann Clark |
| Ellen Koutsky | Charlotte Leibrock |
| James Overholt | Glen Shults, Jr. |
| William Shults | |

Future Interest in Charitable Remainder Trust on 12/31/2009 = \$389,773

NOTE: LEGACY PARKS FOUNDATION, formerly a supporting organization of East Tennessee Foundation in its formative years, became an independent entity, effective January 1, 2009. To effect the transfer of assets from the Legacy Parks Foundation supporting organization, a grant in the amount of \$2,815,633 to the newly-independent organization was recorded. This grant is not included in the totals of grants reflected elsewhere in this Annual Record.

EAST TENNESSEE FOUNDATION

CONSOLIDATED STATEMENT OF FINANCIAL POSITION
December 31, 2009

	Unrestricted	Temporarily Restricted	Total
Assets:			
Cash and cash equivalents	\$ 3,078,922	\$ 769	\$ 3,079,691
Accounts receivable	141,539	-	141,539
Interest and dividends receivable	96,726	-	96,726
Prepaid expenses	2,713	-	2,713
Unconditional promises to give	191,380	4,260,683	4,452,063
Short-term investments	7,422,112	-	7,422,112
Loans/note receivable	268,548	-	268,548
Long-term investments	103,363,128	7,391,951	110,755,079
Other assets	37,749	-	37,749
Property and equipment	9,305,805	-	9,305,805
Total assets	<u>\$ 123,908,622</u>	<u>\$ 11,653,403</u>	<u>\$ 135,562,025</u>
Liabilities and net assets:			
Liabilities -			
Accounts payable	\$ 13,102	\$ -	\$ 13,102
Compensated absences payable	43,957	-	43,957
Grants payable	3,306,113	-	3,306,113
Notes payable	4,877,000	-	4,877,000
Annuity/unitrust liability	-	4,596,325	4,596,325
Liability for amounts held for others	21,766,375	282,468	22,048,843
Total liabilities	<u>30,006,547</u>	<u>4,878,793</u>	<u>34,885,340</u>
Net assets -			
Unrestricted	93,902,075	-	93,902,075
Temporarily restricted	-	6,774,610	6,774,610
Total net assets	<u>93,902,075</u>	<u>6,774,610</u>	<u>100,676,685</u>
Total liabilities and net assets	<u>\$ 123,908,622</u>	<u>\$ 11,653,403</u>	<u>\$ 135,562,025</u>

CONSOLIDATED STATEMENT OF ACTIVITIES
Year Ended December 31, 2009

Revenues, gains, (losses) and other support:			
Contributions and grants	\$ 11,504,016	\$ 225,952	\$ 11,729,968
Investment income	2,066,642	-	2,066,642
Net realized and unrealized loss on investments	11,078,489	-	11,078,489
Change in value of split-interest agreements	-	(944,925)	(944,925)
Other revenue	334,830	-	334,830
Net assets released from restrictions during the period	287,610	(287,610)	-
Total revenues, gains, (losses) and	<u>25,271,587</u>	<u>(1,006,583)</u>	<u>24,265,004</u>
Expenses:			
Program services -			
Grants and contributions	11,360,071	-	11,360,071
Other program services	1,512,372	-	1,512,372
Supporting services -			
Management and general	854,977	-	854,977
Fund-raising expenses	525,391	-	525,391
Total expenses	<u>14,252,811</u>	<u>-</u>	<u>14,252,811</u>
Change in net assets	11,018,776	(1,006,583)	10,012,193
Net assets at beginning of year, as previously stated	<u>82,883,299</u>	<u>7,781,193</u>	<u>90,664,492</u>
Net assets at end of year	<u>\$ 93,902,075</u>	<u>\$ 6,774,610</u>	<u>\$ 100,676,685</u>

The accompanying notes are an integral part of these financial statements. The Foundation will make available upon request the last three years of its tax documents (990 and 990T) and audited financial statements.

East Tennessee Foundation Staff



Left to Right - Front Row: Jackie Lane, Bob Calloway, Carolyn Schwenn, Terry Holley, Mike Mc Clamroch Back Row: Amanda Gillooly, Julie Goodfellow, Jan Elston, Beth Heller, Jeanette Kelleher, Leanna Brackett, Precy Sturgeon

- Leanna Brackett, *Financial & Administrative Officer*.....lbrackett@etf.org
 Bob Calloway, *Vice President for Advancement*.....bcalloway@etf.org
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 Dan Foltz-Gray, *Coordinator, Coffey Memorial Scholarship Fund*
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*Thoughtful giving
for stronger communities,
better lives*

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Confirmed in Compliance with National Standards for U.S. Community Foundations