

TOGETHER WE GROW

THE CAMPAIGN FOR AGRICULTURE

ENDOWMENT STATUS & IMPACT REPORT

UTIA INSTITUTE OF
AGRICULTURE
THE UNIVERSITY OF TENNESSEE

THE UNIVERSITY OF TENNESSEE
UT FOUNDATION
INSTITUTE OF AGRICULTURE

together.tennessee.edu
Real. Life. Solutions.™

INVESTMENT OVERVIEW

The University of Tennessee invests most of its endowments through a diversified, professionally managed Consolidated Investment Pool (CIP). Utilizing economies of scale by combining all endowment gifts together allows UT to strengthen the impact of each gift. A modest return environment, driven by rising inflation and geopolitical tensions around the globe, led to CIP returns slightly lower than those of FY2017. For the twelve-month period ending June 30, 2018, the CIP return on investments was 8.1 percent.

Fiscal Year CIP Returns:
2014: 17.4 percent
2015: 1.0 percent
2016: -2.4 percent
2017: 9.9 percent
2018: 8.1 percent

Distributions from endowments invested through the CIP are made in accordance with the University's strategic spending plan, which allows for the continued funding of endowment priorities even when investment markets are down. In FY 2018, the amount of the endowment distributed for expenditure was 4.5 percent of the six-year market value average.



“Because of the Smith’s gift to fund the Smith Center for International Sustainable Agriculture, I have been able to expand my research program internationally. Agriculture is not just a Tennessee issue. It’s not even a US issue. We need to feed the world by 2050. **We need to globally think about agriculture.**”

-Phillip Myer, Herbert College of Agriculture Assistant Professor



“It is hard to overstate how much H.A.B.I.T. depends on the donations by the public. As they say, **we are dependent on the kindness of strangers.** In the past the money from the interest earned from endowments has been the difference between the ability to continue the program and shutting down.”

-Karen Armsey, H.A.B.I.T. Program Administrator



“If my gifts can help even one young person find a life of service and commitment to 4-H and an ag career, it will be worth it. If it helps many young people to dedicate their lives to building the knowledge base, the leadership, and service to the rural community, then **I will have succeeded beyond hope.**”

-Warren Gill, Herbert College of Agriculture '73, '75, and 4-H donor



“I’m incredibly appreciative of the fact that **somebody has chosen and is willing to invest in my education.** Because of them, I not only feel excited but prepared to start my future career.”

-Ally Clark, Herbert College of Agriculture '20

February 2, 2019

Dear ##first name##:

Thank you for investing in the land-grant mission at the University of Tennessee Institute of Agriculture. It is our pleasure to report to you, and other donors, how your endowment is performing financially and how it is impacting the lives of our students, faculty, staff, and programs. By investing in an endowment at the Institute of Agriculture, you have a lasting impact on not only our Institution but on communities in Tennessee and around the globe.

You will find enclosed the Endowment Status and Impact Report on the endowment you helped create, along with a summary of the UTIA endowment pool. The Institute of Agriculture Endowment has grown 36% in the last five years because of the generosity of donors like you. This growth expands our long-term ability to enrich the lives of our students and support faculty and staff in providing groundbreaking research and enhanced community outreach.

As you review the enclosed materials, please provide feedback and suggestions on the survey included. Your input is vital to our success, especially as we embark on the Institute's most ambitious campaign to date, Together We Grow.

Thank you for helping us create Real. Life. Solutions.

Sincerely,



Tim Cross
Chancellor, UT Institute of Agriculture



Keith Barber
Vice Chancellor, Institutional Advancement

TOGETHER WE GROW

##ACREE FAMILY CHAIR IN SMALL ANIMAL RESEARCH ENDOWMENT##

ENDOWMENT STATUS & ACTIVITY REPORT

FISCAL YEAR 2018
(July 1, 2017 - June 30, 2018)

GENERAL INFORMATION

NAME
ADDRESS
City, STATE ZIP

ENDOWMENT ACTIVITY

Book Value 6/30/2017	\$55,000
Book Value 6/30/2018	\$57,000
Market Value 6/30/2017	\$55,639
Market Value 6/30/2018	\$55,639
FY2017 Contributions	\$55,639
FY 2018 Contributions	\$55,639

Note: Contributions include endowed gifts as well as non-endowed gifts given to support current awards. Disbursements are made at departmental, collegiate or other unit levels and may include a variety of expenditures as specified in endowment agreements. Some disbursements may be supported by additional non-endowed gifts.

SCHOLARSHIP RECIPIENTS FOR 2017-2018

John Doe
John Doe
John Doe
John Doe
John Doe
John Doe

TOGETHER WE GROW

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Learn More about Endowments at UTIA

55% of Donors are Alumni

percentage only pertains to endowment donors

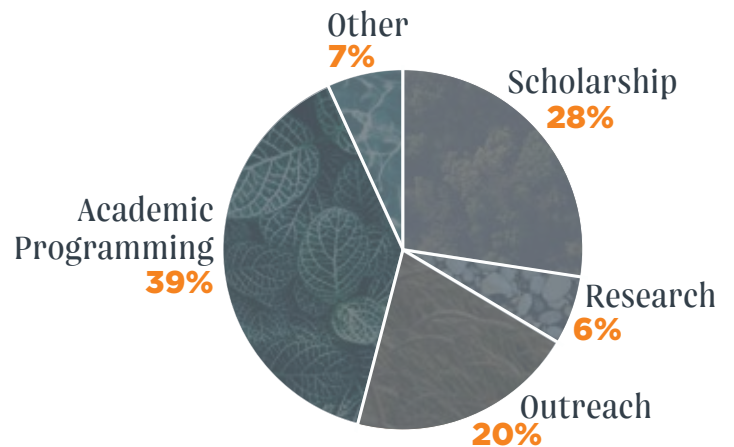
FY2018 Endowment Donations
\$13,152,570

26 New Endowments

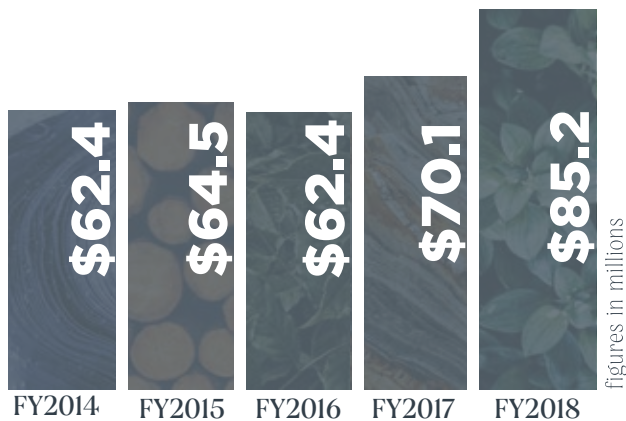
366 Total Endowments

338 Donors to Endowments

Percentage of Endowment Investment by Purpose



Market Value of Endowments



CONTACT US

We strive to be good stewards of the gifts that you have invested in UT. If you have questions about this report, please contact:

Lisa Ford
Manager of Strategic Research
UTIA Office of Advancement
865-974-7439
lford@utfi.org

all figures refer to FY2018 endowments unless otherwise noted.

TOGETHER WE GROW

Please take a few moments to complete the following survey. By sharing your thoughts, you can help us ensure endowment reports meet your expectations.

Online survey link: together.tennessee.edu/endowmentsurvey

1. Name: _____

2. Overall, how would you rate the value of your endowment report?

Very valuable Not very valuable Somewhat valuable Not at all valuable

3. Was the information provided easy to understand?

Yes No

If no, what elements were confusing? _____

4. Would you like to continue to receive this report?

Yes No

5. Is there anyone else who should receive the endowment report for this fund?

Yes No

(A staff member will be in touch with you soon to obtain contact information for the additional recipient.)

6. What suggestions do you have to improve the endowment report?

7. Additional Comments:

What inspired this endowment? If you are interested in sharing the story behind your endowment, please email the story to together@tennessee.edu or mark the box below, and an advancement team member will contact you.

Please contact me at: _____

Thank you for your comments.

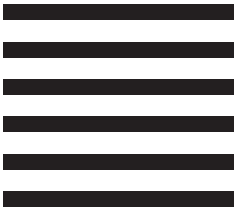
We appreciate your time and dedication to enhance UTIA's land-grant mission.



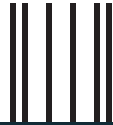
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OFFICE OF AGRICULTURAL DEVELOPMENT - 1027

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THE CAMPAIGN FOR AGRICULTURE

ENDOWMENT STATUS & IMPACT REPORT

FY2018 SURVEY

UTIA INSTITUTE OF AGRICULTURE
THE UNIVERSITY OF TENNESSEE