

Agendum
Oakland University
Board of Trustees Formal Session
December 10, 2018

**ACCEPTANCE OF GIFTS AND PLEDGES TO
OAKLAND UNIVERSITY FOR THE PERIOD OF
SEPTEMBER 20, 2018 THROUGH NOVEMBER 19, 2018**

A Recommendation

1. **Division and Department:** University Advancement.
2. **Introduction:** Every gift makes a difference at Oakland University. Gifts strengthen the University's ability to deliver excellence to our students and our community, both now and in the future, and make strong programs extraordinary by supporting education and technological advancements, as well as current programs. Gifts also make a lasting impact on lives young and old, when they help fund the cost of a college education.

The Board of Trustees (Board) has authorized the President, or his or her designee, to receive and acknowledge gifts to the University, but such gifts must be reported to the Board not less often than quarterly for acceptance on behalf of the University.

At this time, we request that the Board accept the gifts and pledges reported on the attached Gifts and Pledges Report, Attachment A, on behalf of the University.

3. **Previous Board Action:** The Board accepts gifts to Oakland University on a regular basis at its Formal Sessions.
4. **Budget Implications:** Gifts to the University supplement budgets, whether the gift is restricted to a specific area, or unrestricted.
5. **Educational Implications:** Some gifts are designated to fund specific academic programs.
6. **Personnel Implications:** Some gifts may be used for salary or support.
7. **University Reviews/Approvals:** All gifts are processed by the Office of Advancement Information Services and are reviewed by the Vice President for University Advancement, prior to submission to the Board to ensure compliance with federal and state laws and regulations and University policies and procedures when applicable, with assistance from the Office of the Vice President for Legal Affairs when requested.

Acceptance of Gifts and Pledges to Oakland University
for the Period of SEPTEMBER 20, 2018 THROUGH NOVEMBER 19, 2018
Oakland University
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Page 2

8. Recommendation:

RESOLVED, that the Board of Trustees accept the gifts and pledges to Oakland University identified in the attached Gifts and Pledges Report, Attachment A, for the period of SEPTEMBER 20, 2018 THROUGH NOVEMBER 19, 2018.

9. Attachments: A. Gifts and Pledges Report.

Submitted to the President
on 11-28, 2018 by

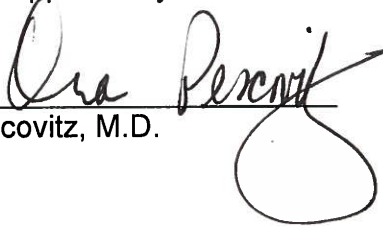


Michael Westfall
Vice President
University Advancement

Recommended on 12/5, 2018
to the Board for approval by



Ora Hirsch Pescovitz, M.D.
President



OAKLAND UNIVERSITY
GIFTS AND PLEDGES TOTALING \$2,500 OR MORE
September 20, 2018 - November 19, 2018

| | | |
|-------------------------------|---|-----------------------|
| Donor ID: 317816 | | \$2,075,500.00 |
| \$2,075,500.00 <u>Bequest</u> | for Meadow Brook Hall Gifts and Donations | |
| Donor ID: 598177 | | \$1,000,000.00 |
| \$836,000.00 <u>Pledge</u> | for Ted Lindsay Foundation Endowment for the Center for Autism-Outreach | |
| \$164,000.00 <u>Pledge</u> | for Ted Lindsay Foundation Endowment for the Center for Autism-Outreach | |
| Donor ID: 742162 | | \$1,000,000.00 |
| \$500,000.00 <u>Pledge</u> | for Cis Maisel Endowment for Judaic Studies & Community Engagement | |
| \$450,000.00 <u>Pledge</u> | for Cis Maisel Endowment for Judaic Studies & Community Engagement | |
| \$50,000.00 <u>Pledge</u> | for Cis Maisel Endowment for Judaic Studies & Community Engagement | |
| Donor ID: 426168 | | \$235,210.00 |
| \$232,710.00 <u>Gift</u> | for Alumni General Sponsorships | |
| \$2,500.00 <u>Gift</u> | for Deans Choice Awards | |
| Donor ID: 320001 | | \$225,000.00 |
| \$225,000.00 <u>Pledge</u> | for Undergraduate Education Gift Fund | |
| Donor ID: 234 | | \$100,000.00 |
| \$100,000.00 <u>Bequest</u> | for Men's Basketball Gifts | |
| Donor ID: 224559 | | \$82,200.00 |
| \$82,200.00 <u>Pledge</u> | for SBA Building Expansion Gift Fund | |
| Donor ID: 746225 | | \$70,000.00 |
| \$70,000.00 <u>Gift</u> | for Morgan Behen Memorial Scholarship for Elementary Education | |
| Donor ID: 719719 | | \$54,800.00 |
| \$50,000.00 <u>Pledge</u> | for University Advancement-Restricted Holding | |
| \$4,800.00 <u>Gift</u> | for Campaign Programs | |
| Donor ID: 370378 | | \$50,000.00 |
| \$25,000.00 <u>Gift</u> | for Men's Golf Gifts | |
| \$25,000.00 <u>Gift</u> | for Women's Golf Gifts | |

Does not include payments on previously approved pledges.

Includes payments on pledges made prior to 9/1/03 for pledges not previously presented to the Board due to reporting change.

OAKLAND UNIVERSITY
GIFTS AND PLEDGES TOTALING \$2,500 OR MORE
September 20, 2018 - November 19, 2018

| | | |
|---------------------------|--|--------------------|
| Donor ID: 410960 | | \$50,000.00 |
| \$50,000.00 <u>Pledge</u> | for Lynne and Lia McIntosh Scholarship | |
| Donor ID: 214583 | | \$40,000.00 |
| \$40,000.00 <u>Pledge</u> | for SBA Building Expansion Gift Fund | |
| Donor ID: 252938 | | \$30,000.00 |
| \$30,000.00 <u>Pledge</u> | for SBA Building Expansion Gift Fund | |
| Donor ID: 327033 | | \$27,130.58 |
| \$15,152.02 <u>Gift</u> | for Jan and Don O'Dowd Performing Arts Endowed Scholarship | |
| \$11,978.56 <u>Gift</u> | for Jan and Don O'Dowd Performing Arts Endowed Scholarship | |
| Donor ID: 185112 | | \$25,000.00 |
| \$25,000.00 <u>Gift</u> | for Bruce & Rose Austin Endowment for Women's Basketball Life Skills | |
| Donor ID: 205330 | | \$25,000.00 |
| \$25,000.00 <u>Gift</u> | for Marlene Gardner Scholarship for Teacher Education Students | |
| Donor ID: 524672 | | \$20,000.00 |
| \$20,000.00 <u>Gift</u> | for SBA Scholarships | |
| Donor ID: 663005 | | \$19,300.00 |
| \$14,300.00 <u>Gift</u> | for ERI-Pediatric Retinal Disorders Lab | |
| \$5,000.00 <u>Gift</u> | for ERI-Pediatric Retinal Disorders Lab | |
| Donor ID: 339719 | | \$18,000.00 |
| \$18,000.00 <u>Gift</u> | for Campaign Programs | |
| Donor ID: 404807 | | \$18,000.00 |
| \$18,000.00 <u>Gift</u> | for Campaign Programs | |
| Donor ID: 311733 | | \$15,000.00 |
| \$10,000.00 <u>Gift</u> | for SECS Scholarships | |
| \$2,500.00 <u>Gift</u> | for School of Engineering and Computer Science Gift Fund | |
| \$2,500.00 <u>Gift</u> | for SECS Project Gift Fund | |

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OAKLAND UNIVERSITY
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September 20, 2018 - November 19, 2018

| | | |
|---------------------------|--|--------------------|
| Donor ID: 691178 | | \$14,810.00 |
| \$14,810.00 <u>Gift</u> | for Paul Morath Memorial Scholarship for Education Endowment | |
| Donor ID: 427345 | | \$14,489.99 |
| \$14,489.99 <u>Gift</u> | for Cleary Memorial Scholarship | |
| Donor ID: 316850 | | \$14,000.00 |
| \$14,000.00 <u>Gift</u> | for Oakland University Scholarship Fund | |
| Donor ID: 327129 | | \$11,000.00 |
| \$5,500.00 <u>Gift</u> | for Women's Swimming Gifts | |
| \$5,500.00 <u>Gift</u> | for Men's Swimming Gifts | |
| Donor ID: 428616 | | \$10,000.00 |
| \$10,000.00 <u>Gift</u> | for OUCARES - Gift Fund | |
| Donor ID: 703976 | | \$10,000.00 |
| \$10,000.00 <u>Gift</u> | for Paul Morath Memorial Scholarship for Education Endowment | |
| Donor ID: 736286 | | \$10,000.00 |
| \$10,000.00 <u>Gift</u> | for Unmanned Ground Vehicle Competition | |
| Donor ID: 784585 | | \$10,000.00 |
| \$10,000.00 <u>Gift</u> | for Paul Morath Memorial Scholarship for Education Endowment | |
| Donor ID: 701903 | | \$6,560.00 |
| \$6,560.00 <u>Gift</u> | for OUCARES - Gift Fund | |
| Donor ID: 1075 | | \$6,000.00 |
| \$6,000.00 <u>Pledge</u> | for Michael and Alexis Iveson Endowed Scholarship | |
| Donor ID: 410106 | | \$6,000.00 |
| \$6,000.00 <u>Bequest</u> | for Donald C. Hildum Scholarship Endowment | |

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OAKLAND UNIVERSITY
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September 20, 2018 - November 19, 2018

| | | |
|--------------------------|---|-------------------|
| Donor ID: 603022 | | \$5,326.67 |
| \$4,978.67 <u>Gift</u> | for Bernard & Nina Kent Judaic Studies Endowed Israel Travel Fund | |
| \$120.00 <u>Gift</u> | for OU Fund | |
| \$120.00 <u>Gift</u> | for OU Fund | |
| \$34.00 <u>Gift</u> | for OU Fund | |
| \$34.00 <u>Gift</u> | for OU Fund | |
| \$20.00 <u>Gift</u> | for OU Fund | |
| \$20.00 <u>Gift</u> | for OU Fund | |
| Donor ID: 758858 | | \$5,250.00 |
| \$5,250.00 <u>Gift</u> | for SBA Gift Fund | |
| Donor ID: 453 | | \$5,000.00 |
| \$5,000.00 <u>Gift</u> | for Library Gifts-Unrestricted | |
| Donor ID: 53879 | | \$5,000.00 |
| \$5,000.00 <u>Pledge</u> | for Miron and Haija Stano Endowed Scholarship Fund | |
| Donor ID: 87631 | | \$5,000.00 |
| \$5,000.00 <u>Gift</u> | for OUWB School of Medicine Named Scholarships | |
| Donor ID: 190775 | | \$5,000.00 |
| \$5,000.00 <u>Gift</u> | for OU Fund | |
| Donor ID: 309697 | | \$5,000.00 |
| \$2,500.00 <u>Gift</u> | for R. Michael O'Brien Endowed Scholarship Fund | |
| \$2,500.00 <u>Gift</u> | for R. Michael O'Brien Endowed Scholarship Fund | |
| Donor ID: 332953 | | \$5,000.00 |
| \$5,000.00 <u>Gift</u> | for Bernard & Nina Kent Judaic Studies Endowed Israel Travel Fund | |
| Donor ID: 394288 | | \$5,000.00 |
| \$5,000.00 <u>Gift</u> | for OUPD Police Department Gift Fund | |
| Donor ID: 410687 | | \$5,000.00 |
| \$2,500.00 <u>Gift</u> | for Men's Swimming Gifts | |
| \$2,500.00 <u>Gift</u> | for Women's Swimming Gifts | |

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| | | |
|--------------------------|--|-------------------|
| Donor ID: 499335 | | \$5,000.00 |
| \$5,000.00 <u>Gift</u> | for John F Mills Memorial Scholarship for Music | |
| Donor ID: 584667 | | \$5,000.00 |
| \$5,000.00 <u>Gift</u> | for Brian Meer Endowed Business Education Fund | |
| Donor ID: 594653 | | \$5,000.00 |
| \$5,000.00 <u>Gift</u> | for SEHS Gift Fund | |
| Donor ID: 663538 | | \$5,000.00 |
| \$5,000.00 <u>Gift</u> | for Keeper of the Dream Named Scholarship Fund | |
| Donor ID: 681598 | | \$5,000.00 |
| \$5,000.00 <u>Pledge</u> | for SHS-Healthology HELPS | |
| Donor ID: 703683 | | \$5,000.00 |
| \$2,500.00 <u>Gift</u> | for CAS-Chaudry Research Support Gift Fund | |
| \$2,500.00 <u>Gift</u> | for CAS-Chaudry Research Support Gift Fund | |
| Donor ID: 776699 | | \$5,000.00 |
| \$5,000.00 <u>Gift</u> | for SECS-Deans Material Support Gifts | |
| Donor ID: 779122 | | \$5,000.00 |
| \$5,000.00 <u>Gift</u> | for Meadow Brook Hall Gifts and Donations | |
| Donor ID: 366912 | | \$4,712.00 |
| \$4,008.00 <u>Pledge</u> | for OUWB School of Medicine Faculty Sponsored Scholarships | |
| \$504.00 <u>Pledge</u> | for OUWB School of Medicine Global Health Scholarship | |
| \$200.00 <u>Gift</u> | for Student Athlete Services Gift Fund | |
| Donor ID: 85523 | | \$4,500.00 |
| \$2,250.00 <u>Pledge</u> | for Men's Cross Country Gifts | |
| \$2,250.00 <u>Pledge</u> | for Women's Cross Country Gifts | |
| Donor ID: 1059 | | \$4,351.20 |
| \$4,351.20 <u>Gift</u> | for Mathematics & Statistics Gift Fund | |

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| | | |
|-------------------------|--|-------------------|
| Donor ID: 232506 | | \$4,000.00 |
| | \$2,000.00 <u>Gift</u> for OU Fund | |
| | \$2,000.00 <u>Gift</u> for CAS-Actuarial Science Gifts | |
| Donor ID: 772020 | | \$4,000.00 |
| | \$4,000.00 <u>Gift in Kind</u> for Honors College Top Ten Fund | |
| Donor ID: 779657 | | \$4,000.00 |
| | \$4,000.00 <u>Gift in Kind</u> for Honors College Top Ten Fund | |
| Donor ID: 779658 | | \$4,000.00 |
| | \$4,000.00 <u>Gift in Kind</u> for Honors College Top Ten Fund | |
| Donor ID: 779659 | | \$4,000.00 |
| | \$4,000.00 <u>Gift in Kind</u> for Honors College Top Ten Fund | |
| Donor ID: 226109 | | \$3,995.00 |
| | \$1,500.00 <u>Gift</u> for Men's Basketball Gifts | |
| | \$1,495.00 <u>Gift</u> for Golden Grizzlies Champion Fund | |
| | \$1,000.00 <u>Gift</u> for Men's Basketball Gifts | |
| Donor ID: 172618 | | \$3,520.00 |
| | \$2,000.00 <u>Gift</u> for Lillie Marie Johnson Legacy Scholarship Endowment for MTD | |
| | \$1,020.00 <u>Pledge</u> for Lillie Marie Johnson Legacy Scholarship Endowment for MTD | |
| | \$500.00 <u>Gift</u> for Hubert Price Jr. Memorial Scholarship for Social Sciences | |
| Donor ID: 4252 | | \$3,000.00 |
| | \$1,000.08 <u>Pledge</u> for Athletics Scholarships | |
| | \$545.52 <u>Pledge</u> for Men's Track Gifts | |
| | \$545.52 <u>Pledge</u> for Men's Cross Country Gifts | |
| | \$363.36 <u>Pledge</u> for SHS-Healthology HELPS | |
| | \$272.76 <u>Pledge</u> for Women's Track Gifts | |
| | \$272.76 <u>Pledge</u> for Women's Cross Country Gifts | |
| Donor ID: 410138 | | \$3,000.00 |
| | \$3,000.00 <u>Pledge</u> for Men's Basketball Advancement Fund | |

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September 20, 2018 - November 19, 2018

| | | |
|-----------------------------|---|-------------------|
| Donor ID: 428907 | | \$3,000.00 |
| \$3,000.00 <u>Pledge</u> | for Center for Biomedical Research Gift Fund | |
| Donor ID: 771287 | | \$3,000.00 |
| \$3,000.00 <u>Gift</u> | for OUWB School of Medicine Excellence in Diversity & Inclusion | |
| Donor ID: 687501 | | \$2,975.00 |
| \$1,666.00 <u>Gift</u> | for Women's Golf Gifts | |
| \$714.00 <u>Gift</u> | for Men's Golf Gifts | |
| \$416.50 <u>Gift</u> | for Women's Golf Gifts | |
| \$178.50 <u>Gift</u> | for Men's Golf Gifts | |
| Donor ID: 427935 | | \$2,968.00 |
| \$1,968.00 <u>Gift</u> | for SECS-Deans Material Support Gifts | |
| \$1,000.00 <u>Gift</u> | for Paul Morath Memorial Scholarship for Education Endowment | |
| Donor ID: 5471 | | \$2,600.00 |
| \$2,250.00 <u>Gift</u> | for Golden Grizzlies Champion Fund | |
| \$100.00 <u>Gift</u> | for Library Gifts-Unrestricted | |
| \$100.00 <u>Gift</u> | for Economics Gift Fund | |
| \$100.00 <u>Gift</u> | for Honors College Scholarship Fund | |
| \$50.00 <u>Gift</u> | for MTD General Gift Fund | |
| Donor ID: 306967 | | \$2,575.00 |
| \$2,500.00 <u>Gift</u> | for OU Beautification Gift Fund | |
| \$75.00 <u>Gift</u> | for CAS Gift Fund | |
| Donor ID: 311219 | | \$2,550.00 |
| \$1,500.00 <u>Gift</u> | for OU Fund | |
| \$1,000.00 <u>Gift</u> | for OU Fund | |
| \$50.00 <u>Gift</u> | for OU Fund | |
| Donor ID: 307927 | | \$2,543.00 |
| \$2,500.00 <u>Gift</u> | for Meadow Brook Hall Gifts and Donations | |
| \$43.00 <u>Gift in Kind</u> | for Meadow Brook Hall Gifts and Donations | |

Does not include payments on previously approved pledges.

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OAKLAND UNIVERSITY
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September 20, 2018 - November 19, 2018

| | | |
|-------------------------|--|-------------------|
| Donor ID: 189 | | \$2,500.00 |
| \$1,100.00 <u>Gift</u> | for English Gift Fund | |
| \$800.00 <u>Gift</u> | for Library Gifts-Unrestricted | |
| \$200.00 <u>Gift</u> | for Library Gifts-Books & OnLine Resources | |
| \$150.00 <u>Gift</u> | for CAS - Center for Ethics Gift Fund | |
| \$150.00 <u>Gift</u> | for Cinema Studies Gifts | |
| \$100.00 <u>Gift</u> | for Sharon L. Wilhelm Fund | |
| Donor ID: 35234 | | \$2,500.00 |
| \$2,500.00 <u>Gift</u> | for Women's Tennis Gifts | |
| Donor ID: 243422 | | \$2,500.00 |
| \$2,500.00 <u>Gift</u> | for Accounting and Finance Gift Fund SBA | |
| Donor ID: 308816 | | \$2,500.00 |
| \$1,500.00 <u>Gift</u> | for Accounting and Finance Gift Fund SBA | |
| \$1,000.00 <u>Gift</u> | for Accounting and Finance Student Support Gift Fund | |
| Donor ID: 320577 | | \$2,500.00 |
| \$2,500.00 <u>Gift</u> | for Campaign Programs | |
| Donor ID: 776705 | | \$2,500.00 |
| \$2,500.00 <u>Gift</u> | for Meadow Brook Hall Gifts and Donations | |

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OAKLAND UNIVERSITY
GIFTS AND PLEDGES TOTALING \$2,500 OR MORE
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TOTALS TO BE APPROVED

Number of Donors

| | |
|-------------------|-------|
| \$2,500 and above | 76 |
| Less than \$2500 | 1,861 |
| Total Donors | 1,937 |

Total Amounts

| | |
|--|----------------|
| Gifts \$2,500 and above | \$758,091.44 |
| Pledges \$2,500 and above | \$2,512,232.00 |
| Bequest Intentions \$2,500 and above | \$2,181,500.00 |
| Gifts-in-Kind \$2,500 and above | \$16,043.00 |
| Total Gifts, Pledges, Bequests, Gifts-in-Kind \$2500 and above | \$5,467,866.44 |
| Total Gifts, Pledges, Bequests, Gifts-in-Kind less than | \$330,352.95 |
| Total Gifts, Pledges, Bequests, Gifts-in-Kind | \$5,798,219.39 |

Note: Total gift assets received September 20, 2018 - November 19, 2018: (includes outright gifts, gifts-in-kind, paid bequests, and payments on pledges previously approved by the Board) \$1,620,654.07