Agendum
Oakland University
Board of Trustees Formal Session
February 7, 2019

#### ACCEPTANCE OF GIFTS AND PLEDGES TO OAKLAND UNIVERSITY FOR THE PERIOD OF NOVEMBER 20, 2018 THROUGH JANUARY 11, 2019

#### **A Recommendation**

- 1. <u>Division and Department:</u> University Advancement.
- 2. <u>Introduction:</u> 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.** <u>Previous Board Action:</u> The Board accepts gifts to Oakland University on a regular basis at its Formal Sessions.
- **4.** <u>Budget Implications:</u> 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. <u>University Reviews/Approvals:</u> 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 NOVEMBER 20, 2018 THROUGH JANUARY 11, 2019 Oakland University Board of Trustees Formal Session February 7, 2019 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 NOVEMBER 20, 2018 THROUGH JANUARY 11, 2019.

9. Attachments: A. Gifts and Pledges Report.

Submitted to the President on \_\_/- ~~ , 2019 by

Michael Westfall Vice President

**University Advancement** 

Recommended on \_\_\_\_\_\_, 2019 to the Board for approval by

Ora Hirsch Pescovitz, M.D.

President

November 20, 2018 - January 11, 2019

<b>Donor ID: 549462</b>	,	\$150,000.00
\$150,000.00 <u>Gift</u>	for Summer Mathematics Camps	
<b>Donor ID: 203872</b>		\$100,000.00
\$100,000.00 <u>Gift</u>	for School of Engineering & Computer Science-Restricted Holdi	ng
<b>Donor ID: 327033</b>		\$100,000.00
\$100,000.00 <u>Gift</u>	for Jan and Don O'Dowd Performing Arts Endowed Scholarship	ı
<b>Donor ID: 410626</b>		\$100,000.00
\$100,000.00 <u>Bequest</u>	for Scholarship Endowment	
<b>Donor ID: 183297</b>		\$75,503.00
\$75,503.00 <u>Bequest</u>	for English Education Scholarship	
<b>Donor ID: 316724</b>		\$75,000.00
\$59,000.00 <u>Gift</u> \$8,000.00 <u>Gift</u> \$4,500.00 <u>Gift</u> \$3,500.00 <u>Gift</u>	for OUWB School of Medicine Named Scholarships for James V. and Ruth E. Huebner Endowed Fund for Anna M. Huebner Endowed Scholarship for The William & Matilda Dahlberg Endowed Nursing Fund	
<b>Donor ID: 562367</b>		\$75,000.00
\$75,000.00 <u>Pledge</u>	for SEHS-Galileo Institute Gift Fund	
<b>Donor ID: 558515</b>		\$65,000.00
\$65,000.00 <u>Gift</u>	for Track Facility Development Fund	
<b>Donor ID: 62231</b>		\$50,000.00
\$50,000.00 <u>Gift</u>	for School of Nursing-Restricted Holding	
<b>Donor ID: 370378</b>		\$50,000.00
\$30,000.00 <u>Gift</u> \$20,000.00 <u>Gift</u>	for OUWB School of Medicine Named Scholarships for SBA-Financial Analysis Gift Fund	

Do	nor ID: 688027		\$40,000.00
	\$30,000.00 <u>Gift</u> \$10,000.00 <u>Gift</u>	for Morgan Behen Memorial Scholarship for Elementary Education for Morgan Behen Memorial Scholarship for Elementary Education	
Do	nor ID: 787640		\$35,000.00
	\$25,000.00 <u>Gift</u> \$10,000.00 <u>Gift</u>	for Athletics-Miracles from Jenna Fund for Men's Basketball Advancement Fund	
Do	nor ID: 187105		\$34,000.00
	\$24,000.00 <u>Pledge</u> \$10,000.00 <u>Gift</u>	for Student Retention Fund Scholarship for Student Retention Fund Scholarship	
Do	nor ID: 98166		\$30,005.00
	\$25,000.00 Pledge \$2,000.00 Gift \$500.00 Gift \$300.00 Gift \$250.00 Gift \$200.00 Gift \$200.00 Gift \$200.00 Gift \$200.00 Gift \$200.00 Gift \$200.00 Gift \$150.00 Gift \$150.00 Gift \$100.00 Gift \$100.00 Gift \$100.00 Gift \$50.00 Gift \$50.00 Gift	for Jean Ann Miller OSI Endowment for CSA Student Organization Gift Fund for Women's Basketball Gifts for Women of OU Critical Difference Scholarship for Psychology Gift Fund for Social Work Research & Development Gift Fund for Student Emergency Fund for Dr. Manuel Pierson Endowed Fund for Men's Basketball Gifts for Meadow Brook Hall Gifts and Donations for Health Emergency Program Gift Fund for Grizzlies Food Pantry for WXOU Gift Fund for Veterans Affairs Gifts for Organic Farms Gifts for CAS Finish Line Scholarship for OUPD Police Department K-9 Unit Gifts for Golden Grizzlies Champion Fund for Oakland University Endowment for Suicide Prevention	
Do	nor ID: 208608		\$30,000.00
	\$30,000.00 <u>Pledge</u>	for SBA Building Expansion Gift Fund	

Donor ID: 4252	onibor 20, 2010 'Garraary 11, 2010	\$25,010.00
\$25,000.00 <u>Pledge</u> \$10.00 <u>Gift</u>	for Mental Health & Wellness Endowment Fund for Men's Track Gifts	
<b>Donor ID: 299123</b>		\$25,000.00
\$25,000.00 Pledge	for Judith Ganton Nursing Scholarship	
<b>Donor ID: 719719</b>		\$25,000.00
\$5,000.00 <u>Gift</u> \$5,000.00 <u>Gift</u> \$5,000.00 <u>Gift</u> \$5,000.00 <u>Gift</u> \$5,000.00 <u>Gift</u>	for MTD Scholarship Gifts for Meadow Brook Hall Gifts and Donations for Ron Cramer and W. Dorsey Hammond Reading Legacy Fund for Grizzlies Food Pantry for Oakland University Endowment for Suicide Prevention	I
<b>Donor ID: 772922</b>		\$25,000.00
\$25,000.00 Gift	for Dr. Stephen Pitzer Scholarship	
<b>Donor ID: 332855</b>		\$15,000.00
\$15,000.00 <u>Gift</u>	for Jennifer Scott Memorial Endowed Scholarship	
<b>Donor ID: 620244</b>		\$14,000.00
\$5,000.00 Gift \$5,000.00 Gift \$1,000.00 Gift \$1,000.00 Gift \$1,000.00 Gift \$500.00 Gift \$500.00 Gift	for Lois and Mark Shaevsky Scholarship for Judaic Studies for Meadow Brook Hall Gifts and Donations for CAS-Judaic Studies Gift Fund for CAS-Judaic Studies Gift Fund for CAS-Judaic Studies Gift Fund for CAS-Judaic Studies Gift Fund for CAS-Judaic Studies Gift Fund	
<b>Donor ID: 632036</b>		\$13,285.00
\$10,000.00 Gift \$1,885.00 Gift \$1,200.00 Gift \$100.00 Gift \$100.00 Gift	for Men's Basketball Gifts for Golf and Learning Center Gift Fund for OUWB School of Medicine Faculty Sponsored Scholarships for Library Gifts-Unrestricted for Library Gifts-Unrestricted	

<b>Donor ID: 36454</b>	•	\$12,500.00
\$12,500.00 Gift	for Student Life Scholarship	
<b>Donor ID: 410960</b>		\$12,010.00
\$10,000.00 <u>Pledge</u> \$2,000.00 <u>Pledge</u> \$10.00 <u>Gift</u>	for Lynne & Lia McIntosh Endowed Scholarship for Lynne & Lia McIntosh Endowed Scholarship for Oakland University Endowment for Suicide Prevention	
<u>Donor ID: 43185</u>		\$10,000.00
\$10,000.00 <u>Gift</u>	for Jocelyn Chen Endowed Scholarship for Art & Art History	
<b>Donor ID: 281436</b>		\$10,000.00
\$10,000.00 Pledge	for School of Engineering and Computer Science Gift Fund	
<b>Donor ID: 339225</b>		\$10,000.00
\$10,000.00 Gift	for Thomas Werth Scholarship	
<b>Donor ID: 500266</b>		\$10,000.00
\$10,000.00 <u>Gift</u>	for SHS-Occupational Safety/Health Gifts	
<b>Donor ID: 785814</b>		\$9,500.00
\$4,000.00 <u>Gift</u> \$3,500.00 <u>Gift</u> \$2,000.00 <u>Gift</u>	for OUCARES - Gift Fund for Disability Support Services Gift Fund for OUCARES - Gift Fund	
<b>Donor ID: 311219</b>		\$8,000.00
\$5,000.00 <u>Gift</u> \$1,500.00 <u>Gift</u> \$500.00 <u>Gift</u> \$500.00 <u>Gift</u> \$200.00 <u>Gift</u> \$200.00 <u>Gift</u> \$100.00 <u>Gift</u>	for Judd Family Endowment for International Relations Scholarship Gifts for OU Fund for OU Fund for SBA Gift Fund for Mathematics & Statistics Gift Fund for CAS Gift Fund	
<b>Donor ID: 94829</b>	,	\$6,000.00
\$6,000.00 Gift	for SECS Scholarships	

Donor ID: 228478	onizor 20, 2010 Garidary 11, 2010	\$6,000.00
\$5,000.00 <u>Gift</u> \$1,000.00 <u>Gift</u>	for School of Nursing-Restricted Holding for School of Nursing Gift Fund	
<b>Donor ID: 306319</b>		\$6,000.00
\$5,000.00 <u>Gift</u> \$1,000.00 <u>Gift</u>	for School of Engineering & Computer Science-Restricted Holding for OUWB School of Medicine Unrestricted Annual Fund	
<b>Donor ID: 603022</b>		\$5,853.20
\$1,000.00 Gift \$1,000.00 Gift \$1,000.00 Gift \$1,000.00 Gift \$1,000.00 Gift \$295.20 Gift \$250.00 Gift \$250.00 Gift \$150.00 Gift \$150.00 Gift \$150.00 Gift \$150.00 Gift \$50.00 Gift	for OU Fund for SBA Accounting & Finance Scholarships for SBA Accounting & Finance Scholarships for OU Fund for OU Fund for CSA Student Organization Gift Fund for Accounting/Finance Student Support Gift Fund for OU Fund for OU Fund for Accounting/Finance Student Support Gift Fund for SBA Gift Fund for Accounting/Finance Student Support Gift Fund for SBA Gift Fund for Accounting/Finance Student Support Gift Fund for SBA Gift Fund for Accounting/Finance Student Support Gift Fund for OU Fund	
<b>Donor ID: 773252</b>		\$5,500.00
\$5,500.00 Gift	for Jennifer Scott Memorial Endowed Scholarship	
<b>Donor ID: 681598</b>		\$5,250.00
\$5,000.04 <u>Pledge</u> \$249.96 <u>Pledge</u>	for SHS-Healthology HELPS for CSA Student Organization Gift Fund	

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<b>Donor ID: 129116</b>		\$5,000.00
\$5,000.00 Gift	for Men's Soccer Gifts	
<b>Donor ID: 193275</b>		\$5,000.00
\$2,500.00 <u>Gift</u> \$2,500.00 <u>Gift</u>	for History Department Gift Fund for Jonathan Riley-Smith Collection Gift Fund	
<b>Donor ID: 313012</b>		\$5,000.00
\$5,000.00 <u>Gift</u>	for Athletics Scholarships	
<b>Donor ID: 317816</b>		\$5,000.00
\$5,000.00 <u>Gift</u>	for Meadow Brook Hall Gifts and Donations	
<b>Donor ID: 320303</b>		\$5,000.00
\$5,000.00 <u>Gift</u>	for OUWB School of Medicine Student Achievement Award	
<b>Donor ID: 322481</b>		\$5,000.00
\$5,000.00 <u>Pledge</u>	for Dillon Family Accounting Student Leadership Scholarship Endo	owment
<b>Donor ID: 356655</b>		\$5,000.00
\$5,000.00 Gift	for OUCARES - Gift Fund	
<b>Donor ID: 425448</b>		\$5,000.00
\$5,000.00 Gift	for Chiu Family SBA Education Endowment	
<b>Donor ID: 568592</b>		\$5,000.00
\$5,000.00 Gift	for Meadow Brook Hall Gifts and Donations	
<b>Donor ID: 703683</b>		\$5,000.00
\$2,500.00 <u>Gift</u> \$2,500.00 <u>Gift</u>	for CAS-Chaudry Research Support Gift Fund for CAS-Chaudry Research Support Gift Fund	
<b>Donor ID: 728596</b>		\$5,000.00
\$5,000.00 Gift	for Meadow Brook Hall Gifts and Donations	

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<b>Donor ID: 785816</b>		\$5,000.00
\$5,000.00 <u>Gift</u>	for Meadow Brook Hall Gifts and Donations	
<b>Donor ID: 654764</b>		\$4,630.00
\$4,630.00 <u>Gift</u>	for Office of Student Success Gift Fund	
<b>Donor ID: 736286</b>		\$4,300.80
\$4,300.80 Gift in Kind	for School of Engineering and Computer Science Gift Fund	
<b>Donor ID: 291906</b>		\$4,000.00
\$4,000.00 <u>Gift</u>	for OUWB School of Medicine Named Scholarships	
Donor ID: 283		\$3,800.00
\$3,500.00 <u>Gift</u> \$300.00 <u>Gift</u>	for Oakland University Scholarship Fund for Krompart-Hildebrand Digitization Gift Fund	
<b>Donor ID: 495859</b>		\$3,600.00
\$1,200.00 <u>Pledge</u> \$1,200.00 <u>Pledge</u> \$1,200.00 <u>Pledge</u>	for OUWB School of Medicine Student Affairs Gifts for Counseling Center Gifts Fund for Gender & Sexuality Center Gift Fund	

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<b>Donor ID: 328895</b>		\$3,550.00
\$300.00 Gift \$150.00 Gift \$100.00 Gift	for Accounting and Finance Gift Fund SBA for Accounting and Finance Gift Fund SBA for SBA Gift Fund for Accounting and Finance Gift Fund SBA for Accounting and Finance Gift Fund SBA for Accounting and Finance Gift Fund SBA for SBA Gift Fund for Accounting and Finance Gift Fund SBA for MTD Theatre Gift Fund for Accounting and Finance Gift Fund SBA	\$3,550.00
\$50.00 <u>Gift</u> \$50.00 <u>Gift</u> \$50.00 <u>Gift</u> \$40.00 <u>Gift</u> \$40.00 <u>Gift</u> \$25.00 <u>Gift</u> \$10.00 <u>Gift</u>	for Accounting and Finance Gift Fund SBA for Accounting and Finance Gift Fund SBA for Accounting and Finance Gift Fund SBA for OU Fund for OU Fund for OU Fund for OU Fund for Accounting and Finance Gift Fund SBA	
\$10.00 <u>Gift</u>	for Accounting and Finance Gift Fund SBA	
<b>Donor ID: 229154</b>		\$3,506.25
\$3,506.25 <u>Gift</u>	for SECS Scholarships	
<b>Donor ID: 301462</b>		\$3,500.00
\$3,500.00 <u>Gift</u>	for Biological Sciences Gift Fund	
<b>Donor ID: 785477</b>		\$3,500.00
\$3,500.00 <u>Gift</u>	for Baseball Gifts	
<b>Donor ID: 496174</b>	·	\$3,400.00
\$3,400.00 <u>Gift</u>	for Campaign Programs	

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<b>Donor ID: 779117</b>	<u> </u>	\$3,400.00
\$3,400.00 <u>Gift</u>	for Campaign Programs	
<b>Donor ID: 229689</b>		\$3,388.80
\$3,388.80 <u>Gift</u>	for University Advancement Holding	
<b>Donor ID: 786107</b>		\$3,247.50
\$3,247.50 <u>Gift</u>	for SBA - Scholars Gift Fund	
Donor ID: 404		\$3,200.00
\$2,700.00 <u>Gift</u> \$500.00 <u>Gift</u>	for Library Gifts-Unrestricted for English Gift Fund	
<u>Donor ID: 8176</u>		\$3,100.00
\$3,100.00 <u>Gift</u>	for Tapestry Scholarship for Masters of Training & Development S	tudents
<b>Donor ID: 56410</b>		\$3,000.00
\$1,500.00 <u>Gift</u> \$1,500.00 <u>Gift</u>	for Women's Cross Country Gifts for Men's Cross Country Gifts	
<b>Donor ID: 226109</b>		\$3,000.00
\$2,000.00 <u>Gift</u> \$1,000.00 <u>Gift</u>	for Men's Basketball Advancement Fund for Men's Basketball Advancement Fund	
<b>Donor ID: 266890</b>		\$3,000.00
\$1,800.00 <u>Pledge</u> \$600.00 <u>Pledge</u> \$600.00 <u>Pledge</u>	for Integrative Studies Gift Fund for Financial Aid Office Discretionary Award for Academic Council Degree Completion Scholarship Fund	
Donor ID: 262	./	\$2,750.00
\$2,703.50 <u>Gift</u> \$46.50 <u>Gift</u>	for Ron Cramer and W. Dorsey Hammond Reading Legacy Fund for Ron Cramer and W. Dorsey Hammond Reading Legacy Fund	
<b>Donor ID: 704109</b>		\$2,750.00
\$2,000.00 <u>Gift</u> \$750.00 <u>Gift</u>	for Accounting and Finance Gift Fund SBA for Accounting and Finance Gift Fund SBA	

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<b>Donor ID: 53935</b>	•	\$2,747.50
\$1,175.00 <u>Gift</u> \$825.00 <u>Gift</u> \$747.50 <u>Gift</u>	for Dr. John White Jr OU Athletics Endowment for Dr. John White Jr OU Athletics Endowment for Golden Grizzlies Champion Fund	
<u>Donor ID: 1059</u>		\$2,700.00
\$1,350.00 <u>Gift</u> \$1,350.00 <u>Gift</u>	for Meadow Brook Hall Gifts and Donations for Mathematics & Statistics Gift Fund	
Donor ID: 427		\$2,500.00
\$1,000.00 <u>Gift</u> \$1,000.00 <u>Gift</u> \$500.00 <u>Gift</u>	for Chemistry General Gift Fund for OU Women's Giving Circle for Organic Farms Gifts	
<b>Donor ID: 236470</b>		\$2,500.00
\$2,500.00 <u>Gift</u>	for Chemistry General Gift Fund	
<b>Donor ID: 271322</b>		\$2,500.00
\$2,500.00 <u>Gift</u>	for Men's Cross Country Gifts	
<b>Donor ID: 318339</b>		\$2,500.00
\$2,500.00 <u>Gift</u>	for School of Engineering and Computer Science Gift Fund	
<b>Donor ID: 406044</b>	•	\$2,500.00
\$2,500.00 <u>Gift</u>	for Accounting and Finance Gift Fund SBA	
<b>Donor ID: 474158</b>		\$2,500.00
\$2,000.00 <u>Gift</u> \$500.00 <u>Gift</u>	for OU Women's Giving Circle for Campaign Programs	
<u>Donor ID: 532041</u>		\$2,500.00
\$2,500.00 Gift	for Keeper of the Dream Gift Fund	
<b>Donor ID: 550551</b>		\$2,500.00
\$2,500.00 Gift	for Meadow Brook Hall Gifts and Donations	

**Donor ID: 738087** 

\$2,500.00

\$2,500.00 Gift

for Campaign Programs

### November 20, 2018 - January 11, 2019

### **TOTALS TO BE APPROVED**

#### **Number of Donors**

\$2,500 and above

7-1,000 and above	7.0
Less than \$2500	1,988
Total Donors	2,067
Total Amounts	
Gifts \$2,500 and above	\$1,002,333.25
Pledges \$2,500 and above	\$242,850.00
Bequest Intentions \$2,500 and above	\$175,503.00
Gifts-in-Kind \$2,500 and above	\$4,300.80
Total Gifts, Pledges, Bequests, Gifts-in-Kind \$2500 and above	\$1,424,987.05
Total Gifts, Pledges, Bequests, Gifts-in-Kind less than \$2500	\$337,232.21
Total Gifts, Pledges, Bequests, Gifts-in-Kind	\$1,762,219.26
Note: Total gift assets received November 20, 2018 - January 11, 2019: (includes outright gifts, gifts-in-kind, paid bequests,	\$2,236,832.56

and payments on pledges previously approved by the Board)

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