

Agendum
Oakland University
Board of Trustees Formal Session
April 6, 2020

ACCEPTANCE OF GIFTS AND PLEDGES TO
OAKLAND UNIVERSITY FOR THE PERIOD OF
JANUARY 25, 2020 THROUGH MARCH 30, 2020

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.

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for the Period of JANUARY 25, 2020 THROUGH MARCH 30, 2020
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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 JANUARY 25, 2020 THROUGH MARCH 30, 2020.

9. Attachments: A. Gifts and Pledges Report.

Submitted to the President
on APRIL 3, 2020 by



Michael Westfall
Vice President
University Advancement

Recommended on _____, 2020
to the Board for approval by



Ora Hirsch Pescovitz, M.D.
President

OAKLAND UNIVERSITY
GIFTS AND PLEDGES TOTALING \$2,500 OR MORE
January 25, 2020 - March 30, 2020

Donor ID: 190046		\$2,802,500.00
\$1,120,000.00 <u>Bequest</u>	for Alumni Memorial Scholarship Endowment Fund	
\$840,000.00 <u>Bequest</u>	for Brancalone/Benson Women's Athletics Endowment	
\$840,000.00 <u>Bequest</u>	for Brancalone/Benson MTD Endowment	
\$2,500.00 <u>Gift</u>	for Tom Ford Athletic Training Endowment	
Donor ID: 20798		\$200,000.00
\$200,000.00 <u>Pledge</u>	for Graduate School Finish Line Endowed Scholarship	
Donor ID: 822155		\$200,000.00
\$200,000.00 <u>Gift</u>	for SECS-Dean's Material Support Gifts	
Donor ID: 256949		\$100,000.00
\$50,000.00 <u>Bequest</u>	for Wu Family Program Support for SBA	
\$50,000.00 <u>Bequest</u>	for Wu Family Scholarships for CAS	
Donor ID: 309526		\$50,000.00
\$30,000.00 <u>Pledge</u>	for Oakland Center Gift Fund	
\$20,000.00 <u>Pledge</u>	for Keeper of the Dream Endowment Fund	
Donor ID: 325237		\$50,000.00
\$50,000.00 <u>Gift</u>	for Diana & William Mitzelfeld Nursing Endowed Scholarship	
Donor ID: 547779		\$50,000.00
\$50,000.00 <u>Gift</u>	for MBH Interpretive Facilities	
Donor ID: 519044		\$47,302.62
\$34,022.62 <u>Gift</u>	for ERI-Pediatric Retinal Disorders Lab	
\$13,280.00 <u>Gift</u>	for ERI-Pediatric Retinal Disorders Lab	
Donor ID: 189940		\$29,461.00
\$29,461.00 <u>Gift</u>	for School of Engineering & Computer Science	

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
January 25, 2020 - March 30, 2020

Donor ID: 410103		\$25,100.00
\$12,500.00 <u>Bequest</u>	for Campus Recreation Gift Fund	
\$12,500.00 <u>Bequest</u>	for Men's Basketball Gifts	
\$100.00 <u>Gift</u>	for Tom Ford Athletic Training Endowment	
Donor ID: 196024		\$25,000.00
\$25,000.00 <u>Pledge</u>	for Corona Family Completion Scholarship	
Donor ID: 332723		\$25,000.00
\$25,000.00 <u>Gift</u>	for William & Mary Schwark Endowed Scholarship in Engineering & Education	
Donor ID: 187105		\$24,000.00
\$24,000.00 <u>Pledge</u>	for Student Retention Fund Scholarship	
Donor ID: 496174		\$17,030.00
\$15,530.00 <u>Gift</u>	for School of Nursing Board of Visitors Fundraising	
\$1,500.00 <u>Gift</u>	for Nightingale Legacy Scholarship	
Donor ID: 685624		\$16,495.00
\$16,495.00 <u>Gift</u>	for School of Nursing Board of Visitors Fundraising	
Donor ID: 598177		\$15,462.00
\$15,462.00 <u>Gift</u>	for OUCARES - Gift Fund	
Donor ID: 339719		\$14,000.00
\$12,700.00 <u>Gift</u>	for School of Nursing Board of Visitors Fundraising	
\$1,300.00 <u>Gift</u>	for School of Nursing Board of Visitors Fundraising	
Donor ID: 332855		\$13,174.04
\$13,174.04 <u>Gift</u>	for Jennifer Scott Memorial Fund	

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Donor ID: 603022		\$11,241.56
\$10,000.00 <u>Gift</u>	for Mark Mendola Completion Scholarship	
\$250.00 <u>Gift</u>	for The Golden Grizzly Spirit Award	
\$250.00 <u>Gift</u>	for MTD General Gift Fund	
\$168.00 <u>Gift</u>	for OU Fund	
\$140.00 <u>Gift</u>	for OU Fund	
\$140.00 <u>Gift</u>	for OU Fund	
\$100.00 <u>Gift</u>	for Oakland University Scholarship Fund	
\$100.00 <u>Gift</u>	for Oakland University Scholarship Fund	
\$50.00 <u>Gift</u>	for Oakland University Scholarship Fund	
\$20.00 <u>Gift</u>	for OU Fund	
\$10.00 <u>Gift</u>	for Golden Grizzlies Champion Fund	
\$10.00 <u>Gift</u>	for OU Fund	
\$3.56 <u>Gift</u>	for SBA Accounting & Finance Scholarships	
Donor ID: 99975		\$10,000.00
\$10,000.00 <u>Pledge</u>	for MTD Music Gift Fund	
Donor ID: 306967		\$10,000.00
\$5,000.00 <u>Gift</u>	for History Department Gift Fund	
\$5,000.00 <u>Gift</u>	for History Department Gift Fund	
Donor ID: 337180		\$8,050.00
\$5,550.00 <u>Gift</u>	for School of Nursing Board of Visitors Fundraising	
\$2,500.00 <u>Gift</u>	for Nightingale Legacy Scholarship	
Donor ID: 637273		\$7,500.00
\$7,500.00 <u>Gift</u>	for SECS Project Gift Fund	
Donor ID: 811204		\$6,000.00
\$5,000.00 <u>Gift</u>	for Accounting and Finance Gift Fund SBA	
\$1,000.00 <u>Gift</u>	for Accounting and Finance Gift Fund SBA	
Donor ID: 313213		\$5,078.00
\$5,078.00 <u>Gift</u>	for Brad M. Glass Endowed Fund	

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Donor ID: 204245		\$5,000.00
\$5,000.00 <u>Gift</u>	for SBA Scholarships	
Donor ID: 222986		\$5,000.00
\$5,000.00 <u>Gift</u>	for School of Nursing Gift Fund	
Donor ID: 301340		\$5,000.00
\$5,000.00 <u>Gift</u>	for Keeper of the Dream Gift Fund	
Donor ID: 547078		\$5,000.00
\$5,000.00 <u>Gift</u>	for Lauren K Roche OU Endowment for Scholarships in Social Work	
Donor ID: 701352		\$5,000.00
\$5,000.00 <u>Gift</u>	for Carol Carpenter Memorial Endowed Writing Scholarship	
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: 728596		\$5,000.00
\$5,000.00 <u>Gift</u>	for Meadow Brook Hall Gifts and Donations	
Donor ID: 821368		\$5,000.00
\$5,000.00 <u>Gift</u>	for OUCARES - Gift Fund	
Donor ID: 472454		\$4,300.00
\$4,300.00 <u>Gift</u>	for Dreamweaver Chinese Language Scholarship	
Donor ID: 125851		\$4,000.00
\$2,000.00 <u>Pledge</u>	for The Dr. Jeremy R Agler MPA Leadership Scholarship	
\$2,000.00 <u>Pledge</u>	for Harriet Nadine Agler Scholarship	
Donor ID: 406889		\$4,000.00
\$4,000.00 <u>Gift</u>	for School of Health Sciences Scholarships	

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Donor ID: 632036		\$4,000.00
\$4,000.00 <u>Gift</u>	for Student Retention Fund Scholarship	
Donor ID: 333374		\$3,690.00
\$3,690.00 <u>Gift</u>	for SBA Celebrates 50	
Donor ID: 339866		\$3,400.00
\$3,400.00 <u>Gift</u>	for School of Nursing Board of Visitors Fundraising	
Donor ID: 1075		\$3,312.48
\$3,312.48 <u>Pledge</u>	for Michael and Alexis Iveson Endowed Scholarship	
Donor ID: 454381		\$3,000.00
\$3,000.00 <u>Gift</u>	for Meadow Brook Hall Gifts and Donations	
Donor ID: 310644		\$2,980.00
\$1,980.00 <u>Gift</u>	for SBA Gift Fund	
\$1,000.00 <u>Gift</u>	for SBA Summer Camps	
Donor ID: 217		\$2,950.00
\$2,500.00 <u>Gift</u>	for G & T Gamboa Behavior & Ecology Student Research Endowment	
\$250.00 <u>Gift</u>	for MTD Music Gift Fund	
\$200.00 <u>Gift</u>	for COVID-19 Student Relief Fund	
Donor ID: 532281		\$2,830.00
\$2,830.00 <u>Gift</u>	for School of Nursing Board of Visitors Fundraising	
Donor ID: 806021		\$2,830.00
\$2,830.00 <u>Gift</u>	for School of Nursing Board of Visitors Fundraising	
Donor ID: 751134		\$2,700.00
\$2,700.00 <u>Gift</u>	for School of Nursing Board of Visitors Fundraising	

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Donor ID: 218810		\$2,626.00
\$2,500.00 <u>Gift</u>	for Tom Ford Athletic Training Endowment	
\$90.00 <u>Gift</u>	for Meadow Brook Estate Membership Fund	
\$36.00 <u>Gift</u>	for Volleyball Gifts	
Donor ID: 821259		\$2,598.00
\$1,698.00 <u>Gift</u>	for School of Nursing Board of Visitors Fundraising	
\$900.00 <u>Gift</u>	for Nightingale Legacy Scholarship	
Donor ID: 289405		\$2,550.00
\$2,500.00 <u>Gift</u>	for Dreamweaver Chinese Language Scholarship	
\$50.00 <u>Gift</u>	for Woodcock Legacy Gift Fund	
Donor ID: 35234		\$2,500.00
\$2,500.00 <u>Gift</u>	for Women's Tennis Gifts	
Donor ID: 117564		\$2,500.00
\$2,500.00 <u>Gift</u>	for The Michael Alan Gerus Memorial Endowed Schlp in Computer Science	
Donor ID: 129116		\$2,500.00
\$2,500.00 <u>Gift</u>	for Men's Soccer Gifts	
Donor ID: 205203		\$2,500.00
\$2,500.00 <u>Gift</u>	for G & T Gamboa Behavior & Ecology Student Research Endowment	
Donor ID: 205727		\$2,500.00
\$2,500.00 <u>Gift</u>	for Men's Swimming Gifts	
Donor ID: 338103		\$2,500.00
\$2,500.00 <u>Gift</u>	for Athletics Scholarships	
Donor ID: 536994		\$2,500.00
\$2,500.00 <u>Gift</u>	for SBA Scholarships	
Donor ID: 547836		\$2,500.00
\$2,500.00 <u>Gift</u>	for Bernard & Nina Kent Judaic Studies Endowed Israel Travel Fund	

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Donor ID: 594868		\$2,500.00
\$2,500.00 <u>Gift</u>	for OUCARES - Gift Fund	
Donor ID: 754922		\$2,500.00
\$2,500.00 <u>Gift</u>	for The Michael Alan Gerus Memorial Endowed Schlp in Computer Science	
Donor ID: 793379		\$2,500.00
\$2,500.00 <u>Gift</u>	for SBA Scholarships	
Donor ID: 821023		\$2,500.00
\$2,500.00 <u>Gift</u>	for Tom Ford Athletic Training Endowment	
Donor ID: 821871		\$2,500.00
\$2,500.00 <u>Gift</u>	for Baseball Gifts	

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TOTALS TO BE

Number of Donors

\$2,500 and above	62
Less than \$2500	877
Total Donors	939

Total Amounts

Gifts \$2,500 and above	\$645,348.22
Pledges \$2,500 and above	\$316,312.48
Bequest Intentions \$2,500 and above	\$2,925,000.00
Gifts-in-Kind \$2,500 and above	\$0.00
Total Gifts, Pledges, Bequests, Gifts-in-Kind \$2,500 and above	\$3,886,660.70
Total Gifts, Pledges, Bequests, Gifts-in-Kind less than \$2,500	\$118,955.15
Total Gifts, Pledges, Bequests, Gifts-in-Kind	\$4,005,615.85

<i>Note: Total gift assets received January 25, 2020 - March 30, 2020: (includes outright gifts, gifts-in-kind, paid bequests, and payments on pledges previously approved by the Board)</i>	\$882,434.33
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