Agendum
Oakland University
Board of Trustees Formal Session
February 6, 2023

#### ACCEPTANCE OF GIFTS AND PLEDGES TO OAKLAND UNIVERSITY FOR THE PERIOD OF NOVEMBER 18, 2022 THROUGH JANUARY 19, 2023

#### A Recommendation

- 1. Division and Department: 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 18, 2022 THROUGH JANUARY 19, 2023 Oakland University Board of Trustees Formal Session FEBRUARY 6, 2023 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 18, 2022 THROUGH JANUARY 19, 2023.

9. Attachments: A. Gifts and Pledges Report.

Submitted to the President on Sav 23, 2023 by

Michael Westfall Vice President

University Advancement

Ora Hirsch Pescovitz, M.D.

President

Reviewed by

Joshua D. Merchant, Ph.D.

Chief of Staff and

Secretary to the Board of Trustees

<b>DONOR ID: 311219</b>		\$81,400.00
\$50,000.00 <u>Gift</u>	for SEHS Teacher Education Endowment	•
\$12,400.00 <u>Gift</u>	for Alumni Memorial Scholarship Endowment Fund	
\$12,000.00 Gift	for Bernard & Nina Kent Judaic Studies Endowed Israel Trave	l Fund
\$2,000.00 <u>Gift</u>	for School of Education and Human Services Scholarships	
\$1,000.00 <u>Gift</u>	for SECS Promise Scholarship	
\$750.00 <u>Gift</u>	for OU Fund	
\$500.00 <u>Gift</u>	for Morgan Behen Memorial Scholarship for Elementary Educa	ation
\$500.00 <u>Gift</u>	for Meadow Brook Estate Membership Fund	
\$500.00 <u>Gift</u>	for OU Fund	
\$500.00 <u>Gift</u>	for SEHS Gift Fund	
\$250.00 <u>Gift</u>	for Mathematics & Statistics Gift Fund	
\$250.00 <u>Gift</u>	for OU Fund	
\$250.00 <u>Gift</u>	for OU Fund	
\$200.00 <u>Gift</u>	for CAS Finish Line Scholarship	
\$100.00 <u>Gift</u>	for OU Fund	
\$100.00 <u>Gift</u>	for Meadow Brook Estate Membership Fund	
\$50.00 <u>Gift</u>	for OU Fund	
\$50.00 <u>Gift</u>	for Mental Health & Wellness Endowment Fund	
<b>DONOR ID: 242360</b>		\$51,000.00
\$50,000.00 Pledge	for CAS Center for Civic Engagement Gift Fund	
\$1,000.00 Pledge	for Alumni Memorial Scholarship Endowment Fund	
<b>DONOR ID: 728596</b>		\$50,000.00
\$50,000.00 Pledge	for MBE Interpretive Facilities	
<b>DONOR ID: 215110</b>		\$50,000.00
\$50,000.00 Bequest	for Barbara Lynn Sutherland Memorial Scholarship Endowmer	nt
<b>DONOR ID: 746225</b>		\$40,000.00
\$40,000.00 <u>Gift</u>	for Morgan Behen Memorial Scholarship for Elementary Educa	ation

<b>DONOR ID: 735926</b>		\$25,000.00
\$25,000.00 <u>Pledge</u>	for Anna and Dominic J. Moceri Finance Scholarship	
<b>DONOR ID: 53983</b>		\$25,000.00
\$25,000.00 <u>Pledge</u>	for The Chris Stiller Endowed Scholarship for Physical Therap	ру
DONOR ID: 187		\$25,000.00
\$25,000.00 Pledge	for De Witt Dykes, Jr. and Silverenia Kanoyton Endowed Scho	olarship
DONOR ID: 241		\$24,000.00
\$24,000.00 <u>Pledge</u>	for The Dr. Karl D. Gregory Endowed Scholarship	
<b>DONOR ID: 813217</b>		\$20,000.00
\$20,000.00 <u>Gift</u>	for SECS-Software Engineering & Program Languages	
<b>DONOR ID: 301462</b>		\$20,000.00
\$20,000.00 Gift	for Biological Sciences Gift Fund	
<b>DONOR ID: 53938</b>		\$20,000.00
\$20,000.00 <u>Gift</u>	for The Carl R Vann Health Scholarship Endowment	
<b>DONOR ID: 1059</b>		\$20,000.00
\$15,000.00 <u>Gift</u>	for Mathematics & Statistics Gift Fund	
\$5,000.00 <u>Gift</u>	for Meadow Brook Hall Gifts and Donations	
<b>DONOR ID: 315623</b>		\$16,845.00
\$16,845.00 <u>Gift</u>	for School of Nursing Board of Visitors Fundraising	
<b>DONOR ID: 881044</b>		\$16,400.00
\$7,500.00 <u>Gift</u>	for Placement Office Gift Fund	
\$3,900.00 <u>Gift</u>	for Placement Office Gift Fund	
\$2,500.00 <u>Gift</u>	for SECS-Deans Material Support Gifts	
\$2,500.00 <u>Gift</u>	for CORE Program Gift Fund	
<b>DONOR ID: 688500</b>		\$15,000.00
\$5,000.00 <u>Gift</u>	for CAS-Judaic Studies Gift Fund	
\$5,000.00 <u>Gift</u>	for OUWB School of Medicine Scholarship Fund	
\$5,000.00 <u>Gift</u>	for OUWBSM Auschwitz Exchange Program Gifts	<b>A A.</b>
<b>DONOR ID: 327033</b>		\$15,000.00
\$15,000.00 <u>Gift</u>	for Jan and Don O'Dowd Performing Arts Endowed Scholarsh	nip .

<b>DONOR ID: 534683</b>		\$14,000.00
\$14,000.00 <u>Gift</u>	for OUWBSM Auschwitz Exchange Program Gifts	
<b>DONOR ID: 410960</b>		\$14,000.00
\$9,000.00 <u>Pledge</u>	for Lynne & Lia McIntosh Endowed Scholarship	
\$4,000.00 <u>Gift</u>	for Lynne & Lia McIntosh Endowed Scholarship	
\$1,000.00 <u>Gift</u>	for Lynne & Lia McIntosh Endowed Scholarship	
<b>DONOR ID: 337595</b>		\$12,700.00
\$12,700.00 <u>Gift</u>	for School of Nursing Board of Visitors Fundraising	
<b>DONOR ID: 681598</b>		\$12,500.00
\$12,500.00 <u>Pledge</u>	for Margaret J. Afheldt & Kevin A. Ball Physical Therapy Scholarship	
<b>DONOR ID: 306967</b>		\$12,500.00
\$5,000.00 <u>Gift</u>	for OU Fund	
\$5,000.00 <u>Gift</u>	for SBA Student Success Program Support	
\$2,500.00 <u>Gift</u>	for OU Fund	
<b>DONOR ID: 312898</b>		\$10,500.00
\$10,000.00 Pledge	for CAS SMTD Student Opportunity Fund	
\$500.00 <u>Gift</u>	for CAS SMTD Student Opportunity Fund	
<b>DONOR ID: 894417</b>		\$10,000.00
\$10,000.00 Pledge	for MBE Interpretive Facilities	
<b>DONOR ID: 886745</b>		\$10,000.00
\$10,000.00 <u>Gift</u>	for OUCARES - Gift Fund	
<b>DONOR ID: 620244</b>		\$10,000.00
\$7,500.00 <u>Gift</u>	for David and Anessa Kramer Performance Excellence Endowment for Men's Basketball	
\$2,500.00 <u>Gift</u>	for Alumni Memorial Scholarship Endowment Fund	
<b>DONOR ID: 455861</b>		\$10,000.00
\$10,000.00 <u>Gift</u>	for Newman Family Capstone Endowed Scholarship	
<b>DONOR ID: 313213</b>		\$10,000.00
\$10,000.00 Pledge	for Brad M. Glass Endowed Fund	
<b>DONOR ID: 216212</b>		\$10,000.00
\$10,000.00 <u>Gift</u>	for Paul Morath Memorial Scholarship for Education Endowm	ent <sup>.</sup>

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.

DONOR ID: 54027		\$10,000.00
\$5,000.00 <u>Gift</u>	for Professor Joel Russell Endowed Scholarship in Chemistry	
\$5,000.00 <u>Gift</u>	for Professor Joel Russell Endowed Scholarship in Chemistry	
DONOR ID: 867679		\$7,500.00
\$2,500.00 Gift	for Men's Swimming and Diving Gifts	
\$2,500.00 Gift	for Women's Swimming and Diving Gifts	
\$2,500.00 <u>Gift</u>	for Campus Recreation Gift Fund	
<b>DONOR ID: 846679</b>		\$7,500.00
\$7,500.00 <u>Gift</u>	for Men's Soccer Gifts	
DONOR ID: 806821		\$7,500.00
\$7,500.00 <u>Gift</u>	for Placement Office Gift Fund	
DONOR ID: 473273		\$7,200.00
\$7,200.00 <u>Gift</u>	for Honors College Top Ten Fund	
<b>DONOR ID: 787865</b>		\$7,000.00
\$7,000.00 <u>Gift</u>	for Student Affairs & Diversity Scholarship Fund	
DONOR ID: 283		\$7,000.00
\$3,100.00 <u>Gift</u>	for Oakland University Scholarship Fund	
\$3,100.00 <u>Gift</u>	for School of Nursing Scholarships	
\$500.00 <u>Gift</u>	for Meadow Brook Hall Gifts and Donations	
\$300.00 <u>Gift</u>	for Charter Challenge Endowment for Archives	
<b>DONOR ID: 788025</b>		\$6,562.00
\$6,562.00 <u>Gift</u>	for Counseling Center Gifts Fund	•
<b>DONOR ID: 106594</b>		\$6,400.00
\$5,000.00 <u>Gift</u>	for Darrin M. Hanna Research & Development Award	
\$1,000.00 Pledge	for SECS Project Gift Fund	
\$400.00 <u>Gift</u>	for SECS Project Gift Fund	
<b>DONOR ID: 63457</b>		\$6,010.00
\$5,000.00 <u>Gift</u>	for Michele & Karl Plattenberger Society of Women Engineers Endowment	s Scholarship
\$1,000.00 Pledge	for CAS Plattenberger Japan Study Abroad Endowment	
\$10.00 <u>Gift</u>	for iPause Mental Health Program Fund	

<b>DONOR ID: 337886</b>		\$6,000.00
\$5,000.00 <u>Gift</u>	for Dillon Family Accounting Student Leadership Scholarship E	ndowment
\$1,000.00 Gift	for Anna and Keith Tack Finish with Honor Endowed Fund	
<b>DONOR ID: 306319</b>		\$6,000.00
\$5,000.00 <u>Gift</u>	for School of Engineering and Computer Science Gift Fund	
\$1,000.00 Gift	for OUWB School of Medicine Unrestricted Annual Fund	
<b>DONOR ID: 146855</b>		\$6,000.00
\$3,000.00 Pledge	for Holly & Garry Gilbert Endowment for Safeguarding the Publi	c Interest
\$3,000.00 Pledge	for Meadow Brook Hall Gifts and Donations	
DONOR ID: 779122		\$5,200.00
\$5,200.00 <u>Gift</u>	for Meadow Brook Estate Wild Game Dinner Gift Fund	
<b>DONOR ID: 897368</b>		\$5,000.00
\$5,000.00 <u>Gift</u>	for Betsy Allan Writing & Rhetoric Memorial Scholarship	
DONOR ID: 893965		\$5,000.00
\$2,500.00 <u>Gift</u>	for SBA Gift Fund	
\$2,500.00 <u>Gift</u>	for Student Emergency Fund	
<b>DONOR ID: 811204</b>		\$5,000.00
\$5,000.00 <u>Gift</u>	for Accounting and Finance Gift Fund SBA	
<b>DONOR ID: 536994</b>		\$5,000.00
\$2,500.00 <u>Gift</u>	for SBA Scholarships	
\$2,500.00 Gift	for SBA Scholarships	
<b>DONOR ID: 532041</b>		\$5,000.00
\$5,000.00 <u>Gift</u>	for Keeper of the Dream Named Scholarship Fund	
<b>DONOR ID: 339922</b>		\$5,000.00
\$5,000.00 <u>Gift</u>	for Meadow Brook Hall Gifts and Donations	
<b>DONOR ID: 305783</b>		\$5,000.00
\$5,000.00 <u>Gift</u>	for MBE Interpretive Facilities	
<b>DONOR ID: 291906</b>		\$5,000.00
\$5,000.00 <u>Gift</u>	for OUWB School of Medicine-Michael & Zina Kramer Scholars	ship

DONOR ID: 289808		\$5,000.00
\$5,000.00 <u>Gift</u>	for SECS Project Gift Fund	
DONOR ID: 207183		\$5,000.00
\$5,000.00 Bequest	for The George C. Balch Memorial Endowed Scholarship	
DONOR ID: 94829		\$5,000.00
\$5,000.00 <u>Gift</u>	for Chris & Fred Killeen Endowed Scholarship for Computer Sc	cience
<b>DONOR ID: 229154</b>		\$4,604.95
\$4,604.95 <u>Gift</u>	for SECS Promise Scholarship	
<b>DONOR ID: 709533</b>		\$4,500.00
\$4,500.00 Gift In Kind	for MTD Music Gift Fund	
DONOR ID: 328895		\$4,500.00
\$1,000.00 <u>Gift</u>	for Accounting and Finance Gift Fund SBA	
\$500.00 <u>Gift</u>	for Accounting and Finance Gift Fund SBA	
\$300.00 <u>Gift</u>	for Accounting and Finance Gift Fund SBA	
\$300.00 <u>Gift</u>	for Graduate School Finish Line Endowed Scholarship	
\$300.00 <u>Gift</u>	for Accounting and Finance Gift Fund SBA	
\$300.00 <u>Gift</u>	for Accounting and Finance Gift Fund SBA	
\$300.00 <u>Gift</u>	for Accounting and Finance Gift Fund SBA	
\$300.00 <u>Gift</u>	for Accounting and Finance Gift Fund SBA	
\$300.00 <u>Gift</u>	for Graduate School Finish Line Endowed Scholarship	
\$300.00 <u>Gift</u>	for Accounting and Finance Gift Fund SBA	•
\$200.00 <u>Gift</u>	for Accounting and Finance Gift Fund SBA	
\$200.00 Gift	for Accounting and Finance Gift Fund SBA	
\$50.00 <u>Gift</u>	for Accounting and Finance Gift Fund SBA	
\$50.00 <u>Gift</u>	for OU Fund	
\$50.00 <u>Gift</u>	for OU Fund	
\$50.00 <u>Gift</u>	for Accounting and Finance Gift Fund SBA	•
<b>DONOR ID: 406889</b>		\$4,000.00
\$4,000.00 <u>Gift</u>	for School of Health Sciences Scholarships	
<b>DONOR ID: 232506</b>		\$4,000.00
\$2,000.00 <u>Gift</u>	for CAS-Actuarial Science Gifts	
\$2,000.00 Gift	for OU Fund	

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.

DONOR ID: 260		\$4,000.00
\$4,000.00 <u>Gift</u>	for Meadow Brook Hall Gifts and Donations	
<b>DONOR ID: 849580</b>		\$3,850.00
\$3,850.00 <u>Gift</u>	for Placement Office Gift Fund	
<b>DONOR ID: 595846</b>		\$3,528.90
\$1,250.00 <u>Gift</u>	for President's Gift Fund	
\$1,250.00 <u>Gift</u>	for President's Gift Fund	
\$400.00 <u>Gift</u>	for Summer Mathematics Camps	
\$400.00 <u>Gift</u>	for OU Fund	
\$100.00 <u>Gift</u>	for OU Fund	
\$100.00 <u>Gift</u>	for OU Fund	
\$9.00 <u>Gift</u>	for Golden Grizzlies Champion Fund	•
\$9.00 <u>Gift</u>	for Golden Grizzlies Champion Fund	
\$4.50 <u>Gift</u>	for Golden Grizzlies Champion Fund	
\$4.50 <u>Gift</u>	for Golden Grizzlies Champion Fund	
\$1.90 <u>Gift</u>	for OU Fund	
DONOR ID: 404		\$3,100.00
\$2,500.00 Gift	for Library Gifts-Unrestricted	•
\$500.00 <u>Gift</u>	for Future Heroes Scholarship Fund	
\$100.00 <u>Gift</u>	for CAS Creative Writing Gifts	
<b>DONOR ID: 895785</b>		\$3,000.00
\$3,000.00 <u>Gift</u>	for OUCARES - Gift Fund	
<b>DONOR ID: 847723</b>		\$3,000.00
\$3,000.00 <u>Gift</u>	for School of Health Sciences Scholarships	
<b>DONOR ID: 782713</b>		\$3,000.00
\$3,000.00 <u>Gift</u>	for School of Nursing Scholarships	
<b>DONOR ID: 774827</b>		\$3,000.00
\$1,000.00 <u>Gift</u>	for Men's Cross Country Gifts	
\$1,000.00 <u>Gift</u>	for Linda McCloskey English Award Endowment for Writing Ex	ccellence
\$1,000.00 <u>Gift</u>	for Women's Cross Country Gifts	

DONOR ID: 545045		\$3,000.00
\$3,000.00 <u>Gift</u>	for MPA Gift Fund	
<b>DONOR ID: 12354</b>		\$3,000.00
\$3,000.00 <u>Gift</u>	for SBA Scholarships	
DONOR ID: 427		\$3,000.00
\$2,000.00 Gift	for Organic Farms Gifts	
\$1,000.00 Gift	for Women and Philanthropy Gift Fund	
<b>DONOR ID: 196024</b>		\$2,987.25
\$2,987.25 <u>Gift</u>	for Corona Family Completion Scholarship	
<b>DONOR ID: 269306</b>		\$2,800.00
\$1,000.00 Gift	for RLA Children Lit-Book Art Exhibit	
\$1,000.00 Gift	for RLA Children Lit-Book Art Exhibit	
\$200.00 Gift	for Harry Hahn Reading Endowment Fund	
\$200.00 Gift	for Grizzlies Food Pantry	•
\$150.00 <u>Gift</u>	for Connie & Tom Barr Classroom Library Endowment	
\$100.00 <u>Gift</u>	for Educational Resources Laboratory Gift Fund	
\$100.00 <u>Gift</u>	for Student Emergency Fund	
\$50.00 <u>Gift</u>	for Ledong Li Global Education Legacy Endowed Fund	
<b>DONOR ID: 61717</b>		\$2,700.00
\$2,700.00 Gift	for Marshall Page Atkinson Memorial Scholarship Endowment	
<b>DONOR ID: 320028</b>		\$2,569.83
\$2,500.00 Pledge	for Grizzlies Food Pantry	
\$69.83 <u>Gift</u>	for MBH Garden Club Gift Fund	
<b>DONOR ID: 411056</b>		\$2,500.00
\$2,500.00 <u>Gift</u>	for Meadow Brook Hall Gifts and Donations	
<b>DONOR ID: 337003</b>		\$2,500.00
\$2,500.00 <u>Pledge</u>	for MBH Organ Gift Fund	
DONOR ID: 330414		\$2,500.00
\$2,500.00 <u>Pledge</u>	for Affordable Education Materials Gift Fund	
DONOR ID: 320170		\$2,500.00
\$2,500.00 Gift	for Bud Kulesza Family Endowed Fund	

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.

DONOR ID: 105730		\$2,500.00
\$2,000.00 <u>Pledge</u>	for Graduate Teacher Education Scholarship Endowment	
\$250.00 Pledge	for Men's Basketball Gifts	
\$250.00 Pledge	for Women's Basketball Gifts	
<b>DONOR ID: 60921</b>		\$2,500.00
\$2,000.00 <u>Gift</u>	for Women and Philanthropy Gift Fund	
\$500.00 <u>Gift</u>	for Teacher Development and Education Studies	

#### **TOTALS TO BE APPROVED**

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\$2,500 and above	80
Less than \$2,500	1634
Total Donors	1715
Total Amounts	
Gifts \$2,500 and above	\$555,857.93
Pledges \$2,500 and above	\$269,500.00
Bequest Intentions \$2,500 and above	\$55,000.00
Gifts-in-Kind \$2,500 and above	\$4,500.00
Total Gifts, Pledges, Bequests, Gifts-in-Kind \$2,500 and above	\$884,857.93
Total Gifts, Pledges, Bequests, Gifts-in-Kind less than \$2,500	\$331,195.94
Total Gifts, Pledges, Bequests, Gifts-in-Kind	\$1,316,053.87

Note: Total gift assets received Nov 18, 2022- Jan 19, 2023: (includes outright gifts, gifts-in-kind, paid bequests and payments on pledges previously approved by the Board)

\$2,029,505.81