

Agendum
Oakland University
Board of Trustees Formal Session
June 4, 2018

**ACCEPTANCE OF GIFTS AND PLEDGES TO
OAKLAND UNIVERSITY FOR THE PERIOD OF
MARCH 10, 2018 THROUGH MAY 9, 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.

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for the Period of MARCH 10, 2018 THROUGH MAY 9, 2018
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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 MARCH 10, 2018 THROUGH MAY 9, 2018.

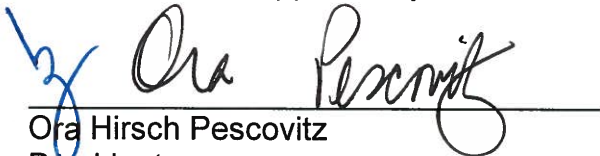
9. Attachments: A. Gifts and Pledges Report.

Submitted to the President
on 5/15/18, 2018 by



Michael Westfall
Vice President
University Advancement

Recommended on 5/17, 2018
to the Board for approval by



Ora Hirsch Pescovitz
President

OAKLAND UNIVERSITY
GIFTS AND PLEDGES TOTALING \$2,500 OR MORE
March 10, 2018 - May 9, 2018

<u>Donor 1</u>		\$581,668.00
\$581,668.00 <u>Bequest</u>	for Professor Joel Russell Endowed Scholarship in Chemistry	
<u>Donor 2</u>		\$60,000.00
\$60,000.00 <u>Pledge</u>	for SBA-Financial Analysis Gift Fund	
<u>Donor 3</u>		\$40,000.00
\$40,000.00 <u>Gift</u>	for SBA-SEM Econ Data Center Gift Fund	
<u>Donor 4</u>		\$30,690.00
\$30,690.00 <u>Gift</u>	for Dr Berton London Gift Annuity 2018	
<u>Donor 5</u>		\$30,637.25
\$30,637.25 <u>Gift</u>	for Ann V Nicholson Endowment-OUWB School of Medicine Students	
<u>Donor 6</u>		\$28,624.00
\$28,624.00 <u>Gift</u>	for Planned Giving-Insurance Premiums Gift Fund	
<u>Donor 7</u>		\$25,000.00
\$25,000.00 <u>Pledge</u>	for The George C. Balch Memorial Endowed Scholarship-Study Abroad	
<u>Donor 8</u>		\$25,000.00
\$10,000.00 <u>Gift</u>	for Meadow Brook Hall Gifts and Donations	
\$10,000.00 <u>Gift</u>	for Honors College Top Ten Fund	
\$5,000.00 <u>Gift</u>	for History Department Gift Fund	
<u>Donor 9</u>		\$20,000.00
\$20,000.00 <u>Gift</u>	for Women's Cross Country Gifts	
<u>Donor 10</u>		\$11,000.00
\$10,000.00 <u>Gift</u>	for Chemistry Project Gift Fund (Mark Dershwitz)	
\$1,000.00 <u>Gift</u>	for SBA-ACHIEVE Gift Fund (Michael J. Novak)	
<u>Donor 11</u>		\$10,000.00
\$10,000.00 <u>Gift</u>	for SECS Project Gift 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.

OAKLAND UNIVERSITY
GIFTS AND PLEDGES TOTALING \$2,500 OR MORE
March 10, 2018 - May 9, 2018

<u>Donor 12</u>		\$10,000.00
\$10,000.00	<u>Gift</u>	for Unmanned Ground Vehicle Competition
<u>Donor 13</u>		\$10,000.00
\$10,000.00	<u>Gift</u>	for Carol Carpenter Memorial Endowed Writing Scholarship
<u>Donor 14</u>		\$8,580.00
\$8,580.00	<u>Gift</u>	for School of Nursing Board of Visitors Fundraising
<u>Donor 15</u>		\$8,000.00
\$8,000.00	<u>Gift</u>	for OUCARES - Gift Fund
<u>Donor 16</u>		\$8,000.00
\$5,000.00	<u>Pledge</u>	for OUCARES - Gift Fund
\$2,000.00	<u>Gift</u>	for School of Education and Human Services Scholarships
\$1,000.00	<u>Gift</u>	for OUCARES - Gift Fund
<u>Donor 17</u>		\$7,000.00
\$7,000.00	<u>Gift</u>	for McLean Macomb Town Hall Endowment
<u>Donor 18</u>		\$6,250.00
\$6,250.00	<u>Pledge</u>	for Shamil and Laura Halabu Endowed Honors Scholarship
<u>Donor 19</u>		\$6,250.00
\$6,250.00	<u>Pledge</u>	for Shamil and Laura Halabu Endowed Honors Scholarship
<u>Donor 20</u>		\$6,250.00
\$6,250.00	<u>Pledge</u>	for Shamil and Laura Halabu Endowed Honors Scholarship
<u>Donor 21</u>		\$6,250.00
\$6,250.00	<u>Pledge</u>	for Shamil and Laura Halabu Endowed Honors Scholarship
<u>Donor 22</u>		\$5,600.00
\$5,000.00	<u>Gift</u>	for Chemistry General Gift Fund
\$350.00	<u>Gift</u>	for Women's Swimming Gifts
\$250.00	<u>Gift</u>	for International Education Study Abroad Scholarship Fund

Does not include payments on previously approved pledges.

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March 10, 2018 - May 9, 2018

<u>Donor 23</u>		\$5,360.00
\$5,360.00	<u>Gift</u>	for SECS-Deans Material Support Gifts
<u>Donor 24</u>		\$5,136.00
\$5,000.00	<u>Gift</u>	for Krompart-Hildebrand Digitization Gift Fund
\$136.00	<u>Gift</u>	for Library Gifts-Unrestricted
<u>Donor 25</u>		\$5,100.00
\$1,500.00	<u>Gift</u>	for School of Nursing Gift Fund
\$1,400.00	<u>Gift</u>	for History Department Gift Fund
\$1,000.00	<u>Gift</u>	for Accounting and Finance Gift Fund SBA
\$750.00	<u>Gift</u>	for Accounting and Finance Gift Fund SBA
\$100.00	<u>Gift</u>	for Dillon Family Accounting Student Leadership Scholarship
\$100.00	<u>Gift</u>	for Accounting and Finance Gift Fund SBA
\$100.00	<u>Gift</u>	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 Dillon Family Accounting Student Leadership Scholarship
\$50.00	<u>Gift</u>	for Accounting and Finance Gift Fund SBA
<u>Donor 26</u>		\$5,000.00
\$5,000.00	<u>Pledge</u>	for OUCARES - Gift Fund
<u>Donor 27</u>		\$5,000.00
\$5,000.00	<u>Pledge</u>	for The Jaws Legacy Endowed Housing Scholarship
<u>Donor 28</u>		\$5,000.00
\$5,000.00	<u>Gift</u>	for Men's Basketball Gifts
<u>Donor 29</u>		\$5,000.00
\$5,000.00	<u>Pledge</u>	for The Jaws Legacy Endowed Housing Scholarship
<u>Donor 30</u>		\$5,000.00
\$5,000.00	<u>Gift</u>	for Bernard & Nina Kent Judaic Studies Endowed Israel Travel Fd
<u>Donor 31</u>		\$4,630.00
\$4,630.00	<u>Gift</u>	for Undergraduate Education Gift Fund

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OAKLAND UNIVERSITY
GIFTS AND PLEDGES TOTALING \$2,500 OR MORE
March 10, 2018 - May 9, 2018

<u>Donor 32</u>		\$4,200.00
\$4,200.00	<u>Gift</u>	for SHS-Healthology HELPS
<u>Donor 33</u>		\$4,200.00
\$4,200.00	<u>Gift</u>	for SHS-Healthology HELPS
<u>Donor 34</u>		\$4,180.00
\$4,180.00	<u>Gift</u>	for SECS-Deans Material Support Gifts
<u>Donor 35</u>		\$4,180.00
\$4,180.00	<u>Gift</u>	for SECS-Deans Material Support Gifts
<u>Donor 36</u>		\$4,166.66
\$2,083.33	<u>Gift</u>	for CAS-Chaudry Research Support Gift Fund
\$2,083.33	<u>Gift</u>	for CAS-Chaudry Research Support Gift Fund
<u>Donor 37</u>		\$3,880.00
\$3,880.00	<u>Gift</u>	for School of Nursing Board of Visitors Fundraising
<u>Donor 38</u>		\$3,504.00
\$3,504.00	<u>Gift</u>	for OUAA Golf Challenge Gifts
<u>Donor 39</u>		\$3,500.00
\$3,500.00	<u>Gift</u>	for Oakland University Trustee Academic Success Scholarship Fund
<u>Donor 40</u>		\$3,330.00
\$3,030.00	<u>Gift</u>	for School of Nursing Board of Visitors Fundraising
\$300.00	<u>Gift</u>	for School of Nursing Board of Visitors Fundraising
<u>Donor 41</u>		\$3,300.00
\$3,300.00	<u>Gift</u>	for The Jaws Legacy Endowed Housing Scholarship
<u>Donor 42</u>		\$3,180.00
\$3,180.00	<u>Gift</u>	for SECS-Deans Material Support Gifts
<u>Donor 43</u>		\$3,130.00
\$3,130.00	<u>Gift</u>	for Undergraduate Education Gift Fund

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OAKLAND UNIVERSITY
GIFTS AND PLEDGES TOTALING \$2,500 OR MORE
March 10, 2018 - May 9, 2018

<u>Donor 44</u>		\$3,030.00
\$3,030.00	<u>Gift</u>	for School of Nursing Board of Visitors Fundraising
<u>Donor 45</u>		\$3,030.00
\$3,030.00	<u>Gift</u>	for School of Nursing Board of Visitors Fundraising
<u>Donor 46</u>		\$3,000.00
\$3,000.00	<u>Pledge</u>	for The Jaws Legacy Endowed Housing Scholarship
<u>Donor 47</u>		\$2,800.00
\$850.00	<u>Gift</u>	for School of Nursing Board of Visitors Fundraising
\$650.00	<u>Gift</u>	for School of Nursing Board of Visitors Fundraising
\$650.00	<u>Gift</u>	for School of Nursing Board of Visitors Fundraising
\$650.00	<u>Gift</u>	for School of Nursing Board of Visitors Fundraising
<u>Donor 48</u>		\$2,680.00
\$2,680.00	<u>Gift</u>	for SECS-Deans Material Support Gifts
<u>Donor 49</u>		\$2,680.00
\$2,680.00	<u>Gift</u>	for SECS-Deans Material Support Gifts
<u>Donor 50</u>		\$2,680.00
\$2,680.00	<u>Gift</u>	for SECS-Deans Material Support Gifts
<u>Donor 51</u>		\$2,500.00
\$2,500.00	<u>Gift</u>	for OU Beautification Gift Fund
<u>Donor 52</u>		\$2,500.00
\$2,500.00	<u>Pledge</u>	for OUCARES - Gift Fund
<u>Donor 53</u>		\$2,500.00
\$2,500.00	<u>Gift</u>	for School of Engineering and Computer Science Gift Fund
<u>Donor 54</u>		\$2,500.00
\$2,500.00	<u>Pledge</u>	for OUCARES - Gift Fund
<u>Donor 55</u>		\$2,500.00
\$2,500.00	<u>Pledge</u>	for OUCARES - Gift Fund

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OAKLAND UNIVERSITY
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March 10, 2018 - May 9, 2018

<u>Donor 56</u>			\$2,500.00
\$2,500.00	<u>Pledge</u>	for OUCARES - Gift Fund	
<u>Donor 57</u>			\$2,500.00
\$2,500.00	<u>Gift</u>	for SBA Scholarships	
<u>Donor 58</u>			\$2,500.00
\$2,500.00	<u>Gift</u>	for School of Nursing Board of Visitors Fundraising	

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March 10, 2018 - May 9, 2018

TOTALS TO BE APPROVED

Number of Donors

\$2,500 and above	58
Less than \$2500	773
Total Donors	831

Total Amounts

Gifts \$2,500 and above	\$350,007.91
Pledges \$2,500 and above	\$143,000.00
Bequest Intentions \$2,500 and above	\$581,668.00
Gifts-in-Kind \$2,500 and above	\$0.00
Total Gifts, Pledges, Bequests, Gifts-in-Kind \$2500 and above	\$1,074,675.91
Total Gifts, Pledges, Bequests, Gifts-in-Kind less than \$2500	\$112,241.25
Total Gifts, Pledges, Bequests, Gifts-in-Kind	\$1,186,917.16

*Note: Total gift assets received March 10, 2018 - May 9, 2018: \$615,067.67
(includes outright gifts, gifts-in-kind, paid bequests, and
payments on pledges previously approved by the Board)*

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.