

Agendum
Oakland University
Board of Trustees Formal Session
April 14, 2022

**ACCEPTANCE OF GIFTS AND PLEDGES TO
OAKLAND UNIVERSITY FOR THE PERIOD OF
JANUARY 25, 2022 THROUGH MARCH 31, 2022**

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, 2022 THROUGH MARCH 31, 2022
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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, 2022 THROUGH MARCH 31, 2022.

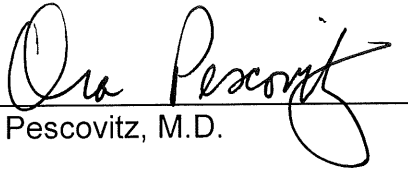
9. **Attachments:** A. Gifts and Pledges Report.

Submitted to the President
on April 4, 2022 by



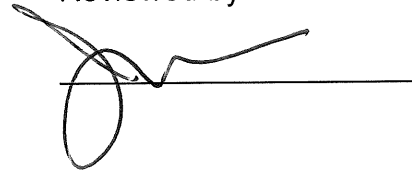
Michael Westfall
Vice President
University Advancement

Recommended on 4/11, 2022
to the Board for approval by



Ora Hirsch Pescovitz, M.D.
President

Reviewed by



OAKLAND UNIVERSITY
GIFTS AND PLEDGES TOTALING \$2,500 OR MORE
1/25/2022-3/31/2022

<u>DONOR ID: 308712</u>	\$200,000.00
\$100,000.00 <u>Pledge</u>	for MBH Museum Enrichment
\$100,000.00 <u>Pledge</u>	for Oakland University Katke-Cousins Golf Course Gifts
<u>DONOR ID: 410569</u>	\$150,000.00
\$150,000.00 <u>Bequest</u>	for Patrick C. and Mercedes M. Nicosia Endowed Fund
<u>DONOR ID: 825775</u>	\$114,042.00
\$114,042.00 <u>Gift</u>	for SECS-Deans Material Support Gifts
<u>DONOR ID: 754169</u>	\$110,000.00
\$110,000.00 <u>Pledge</u>	for Commuter Scholarship Fund
<u>DONOR ID: 549462</u>	\$100,000.00
\$100,000.00 <u>Gift</u>	for TDC Construction Pre-Apprenticeship Program
<u>DONOR ID: 117564</u>	\$100,000.00
\$80,000.00 <u>Gift</u>	for The Michael Alan Gerus Memorial Endowed Scholarship in Computer Science
\$20,000.00 <u>Gift</u>	for The Michael Alan Gerus Memorial Endowed Scholarship in Computer Science
<u>DONOR ID: 204245</u>	\$90,000.00
\$85,000.00 <u>Pledge</u>	for Tamara and Henry Tazzia Endowed Business Scholarship
\$5,000.00 <u>Pledge</u>	for Tamara and Henry Tazzia Endowed Business Scholarship
<u>DONOR ID: 319367</u>	\$78,854.02
\$78,854.02 <u>Bequest</u>	for Barry Klein Endowed Scholarship
<u>DONOR ID: 266424</u>	\$70,070.00
\$54,293.00 <u>Bequest</u>	for Sokol Endowed Scholarship for Veterans
\$15,777.00 <u>Bequest</u>	for Planned Giving-Insurance Premiums Gift Fund
<u>DONOR ID: 340747</u>	\$70,000.00
\$70,000.00 <u>Gift</u>	for Donna and Walt Young Study Abroad Endowed Scholarship Fund
<u>DONOR ID: 806345</u>	\$50,000.00
\$50,000.00 <u>Gift</u>	for Danto Foundation Holocaust Education Program Endowment
<u>DONOR ID: 829549</u>	\$48,850.00
\$30,000.00 <u>Gift</u>	for Keeper of the Dream Gift Fund
\$7,500.00 <u>Gift</u>	for Placement Office Gift Fund
\$3,850.00 <u>Gift</u>	for Placement Office Gift Fund
\$2,500.00 <u>Gift</u>	for Center for Multicultural Initiatives 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
1/25/2022-3/31/2022

\$2,500.00 <u>Gift</u>	for Gender & Sexuality Center Gift Fund	
\$2,500.00 <u>Gift</u>	for Veterans Affairs Gifts	
<u>DONOR ID: 187105</u>		\$40,000.00
\$40,000.00 <u>Pledge</u>	for CORE Program Gift Fund	
<u>DONOR ID: 788025</u>		\$39,800.00
\$39,800.00 <u>Gift</u>	for OUCARES - Gift Fund	
<u>DONOR ID: 742119</u>		\$30,000.00
\$30,000.00 <u>Pledge</u>	for Applebaum Honors College Internship Program	
<u>DONOR ID: 301347</u>		\$29,195.00
\$26,195.00 <u>Gift</u>	for School of Nursing Board of Visitors Fundraising	
\$3,000.00 <u>Gift</u>	for Nightingale Legacy Endowed Scholarship for Nursing	
<u>DONOR ID: 872043</u>		\$25,000.00
\$25,000.00 <u>Bequest</u>	for Hailey Brouillet Endowment for Study Abroad Scholarships	
<u>DONOR ID: 241</u>		\$21,000.00
\$20,000.00 <u>Pledge</u>	for Thornton Legacy Fund	
\$1,000.00 <u>Pledge</u>	for Thornton Legacy Fund	
<u>DONOR ID: 315623</u>		\$16,495.00
\$16,495.00 <u>Gift</u>	for School of Nursing Board of Visitors Fundraising	
<u>DONOR ID: 331985</u>		\$16,000.00
\$16,000.00 <u>Pledge</u>	for Sandy Family Completion Endowed Scholarship	
<u>DONOR ID: 306967</u>		\$15,000.00
\$15,000.00 <u>Gift</u>	for SECS Scholarships	
<u>DONOR ID: 300342</u>		\$15,000.00
\$15,000.00 <u>Gift</u>	for Library Gifts-Unrestricted	
<u>DONOR ID: 339719</u>		\$12,700.00
\$12,700.00 <u>Gift</u>	for School of Nursing Board of Visitors Fundraising	
<u>DONOR ID: 603022</u>		\$10,500.00
\$10,000.00 <u>Gift</u>	for Mark Mendola Completion Scholarship	
\$300.00 <u>Gift</u>	for MTD Dance Gift Fund	
\$100.00 <u>Gift</u>	for Accounting/Finance Student Support Gift Fund	
\$50.00 <u>Gift</u>	for Baseball Gifts	

Does not include payments on previously approved pledges.

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\$50.00 <u>Gift</u>	for Baseball Gifts	
<u>DONOR ID: 427935</u>		\$10,000.00
\$9,000.00 <u>Gift</u>	for Keeper of the Dream Gift Fund	
\$1,000.00 <u>Gift</u>	for CMI - Student Retention Fund Scholarship	
<u>DONOR ID: 301549</u>		\$10,000.00
\$5,000.00 <u>Gift</u>	for SECS Scholarships	
\$5,000.00 <u>Gift</u>	for Keeper of the Dream Named Scholarship Fund	
<u>DONOR ID: 295451</u>		\$10,000.00
\$10,000.00 <u>Gift</u>	for Meadow Brook Hall Gifts and Donations	
<u>DONOR ID: 873557</u>		\$9,116.40
\$9,116.40 <u>Gift</u>	for School of Education and Human Services Scholarships	
<u>DONOR ID: 811204</u>		\$6,541.60
\$6,000.00 <u>Gift</u>	for Accounting and Finance Gift Fund SBA	
\$541.60 <u>Gift</u>	for Accounting and Finance Gift Fund SBA	
<u>DONOR ID: 340461</u>		\$6,052.33
\$6,052.33 <u>Gift In Kind</u>	for SHS-Orthotics & Prosthetics	
<u>DONOR ID: 847749</u>		\$6,000.00
\$6,000.00 <u>Gift</u>	for Trustee Academic Success Scholarship Fund	
<u>DONOR ID: 309265</u>		\$5,550.00
\$5,550.00 <u>Gift</u>	for School of Nursing Board of Visitors Fundraising	
<u>DONOR ID: 311219</u>		\$5,350.00
\$3,000.00 <u>Gift</u>	for Thornton Legacy Fund	
\$500.00 <u>Gift</u>	for CAS-Judaic Studies Gift Fund	
\$500.00 <u>Gift</u>	for School of Nursing Gift Fund	
\$500.00 <u>Gift</u>	for OU Parents Gift Fund	
\$250.00 <u>Gift</u>	for OU Fund	
\$250.00 <u>Gift</u>	for OU Fund	
\$200.00 <u>Gift</u>	for Women's Swimming and Diving Gifts	
\$100.00 <u>Gift</u>	for Golden Grizzlies Champion Fund	
\$50.00 <u>Gift</u>	for OU Fund	

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<u>DONOR ID: 843266</u>		\$5,000.00
\$5,000.00 <u>Gift</u>	for OUCARES - Gift Fund	
<u>DONOR ID: 827248</u>		\$5,000.00
\$5,000.00 <u>Gift</u>	for Women's Soccer Gifts	
<u>DONOR ID: 771916</u>		\$5,000.00
\$5,000.00 <u>Gift</u>	for Unmanned Ground Vehicle Competition	
<u>DONOR ID: 663538</u>		\$5,000.00
\$5,000.00 <u>Gift</u>	for Keeper of the Dream Named Scholarship Fund	
<u>DONOR ID: 598163</u>		\$5,000.00
\$3,500.00 <u>Gift</u>	for Sandra and Eric Pelfrey Endowed Accounting Student Scholarship	
\$1,500.00 <u>Gift</u>	for Sandra and Eric Pelfrey Endowed Accounting Student Scholarship	
<u>DONOR ID: 577875</u>		\$5,000.00
\$5,000.00 <u>Pledge</u>	for Men's Basketball Gifts	
<u>DONOR ID: 539957</u>		\$5,000.00
\$5,000.00 <u>Gift</u>	for Keeper of the Dream Named Scholarship Fund	
<u>DONOR ID: 472297</u>		\$5,000.00
\$5,000.00 <u>Gift</u>	for SBA Scholarships	
<u>DONOR ID: 300139</u>		\$5,000.00
\$5,000.00 <u>Gift</u>	for Gate Lodge Fund	
<u>DONOR ID: 218810</u>		\$5,000.00
\$5,000.00 <u>Gift</u>	for Beth Benson Endowed Scholarship in Musical Performance	
<u>DONOR ID: 872933</u>		\$4,000.00
\$2,000.00 <u>Gift</u>	for MTD Dance Gift Fund	
\$1,000.00 <u>Gift</u>	for MTD Scholarship Gifts	
\$1,000.00 <u>Gift</u>	for MTD Music Gift Fund	
<u>DONOR ID: 406044</u>		\$4,000.00
\$2,000.00 <u>Gift</u>	for Accounting and Finance Gift Fund SBA	
\$2,000.00 <u>Gift</u>	for Accounting and Finance Gift Fund SBA	
<u>DONOR ID: 392790</u>		\$4,000.00
\$1,000.00 <u>Gift</u>	for Nassar Foundation Endowed Scholarship in Islamic Studies	
\$1,000.00 <u>Gift</u>	for Hajja Razia Sharif Sheikh OU Endowment for Islamic Studies Scholarships	

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\$1,000.00 <u>Gift</u>	for Islamic Studies Gift Fund	
\$1,000.00 <u>Gift</u>	for Hajja Razia Sharif Sheikh End-Islamic Understanding Programs	
<u>DONOR ID: 305783</u>		\$4,000.00
\$4,000.00 <u>Gift</u>	for Meadow Brook Hall Gifts and Donations	
<u>DONOR ID: 125851</u>		\$4,000.00
\$2,000.00 <u>Pledge</u>	for Harriet Nadine Agler Scholarship	
\$2,000.00 <u>Pledge</u>	for The Dr. Jeremy R Agler MPA Leadership Scholarship	
<u>DONOR ID: 323348</u>		\$3,500.00
\$3,500.00 <u>Gift</u>	for Simmer Fund in Health Sciences	
<u>DONOR ID: 309310</u>		\$3,500.00
\$3,000.00 <u>Gift</u>	for SBA Accounting & Finance Scholarships	
\$500.00 <u>Gift</u>	for SBA Celebrates 50	
<u>DONOR ID: 301340</u>		\$3,500.00
\$3,500.00 <u>Gift</u>	for Placement Office Gift Fund	
<u>DONOR ID: 632036</u>		\$3,200.00
\$3,000.00 <u>Gift</u>	for OUWB School of Medicine Scholarship Fund	
\$200.00 <u>Gift</u>	for Charter Challenge Endowment for Archives	
<u>DONOR ID: 820350</u>		\$3,000.00
\$3,000.00 <u>Gift</u>	for Honors College Top Ten Fund	
<u>DONOR ID: 228551</u>		\$3,000.00
\$3,000.00 <u>Gift</u>	for Oakland Ray Miller Memorial Swimming and Diving Fund	
<u>DONOR ID: 793379</u>		\$2,500.00
\$2,500.00 <u>Gift</u>	for SBA Accounting & Finance Scholarships	
<u>DONOR ID: 295704</u>		\$2,500.00
\$2,500.00 <u>Gift</u>	for Unmanned Ground Vehicle Competition	
<u>DONOR ID: 258893</u>		\$2,500.00
\$2,500.00 <u>Gift</u>	for School of Health Sciences Scholarships	
<u>DONOR ID: 11646</u>		\$2,500.00
\$2,500.00 <u>Gift</u>	for Men's Swimming and Diving Gifts	

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TOTALS TO BE APPROVED

Number of Donors

\$2,500 and above	58
Less than \$2,500	1221
Total Donors	1279

Total Amounts

Gifts \$2,500 and above	\$774,840.00
Pledges \$2,500 and above	\$516,000.00
Bequest Intentions \$2,500 and above	\$323,924.02
Gifts-in-Kind \$2,500 and above	\$6,052.33

Total Gifts, Pledges, Bequests, Gifts-in-Kind \$2,500 and above	\$1,620,816.35
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Total Gifts, Pledges, Bequests, Gifts-in-Kind less than \$2,500	\$221,260.31
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Total Gifts, Pledges, Bequests, Gifts-in-Kind	\$1,842,076.66
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Note: Total gift assets received Jan 25, 2022- Mar 31, 2022: (includes outright gifts, gifts-in-kind, paid bequests and payments on pledges previously approved by the Board)	\$1,884,511.01
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