Agendum
Oakland University
Board of Trustees Formal Session
February 2, 2024

ACCEPTANCE OF GIFTS AND PLEDGES TO OAKLAND UNIVERSITY FOR THE PERIOD OF NOVEMBER 21, 2023 THROUGH JANUARY 26, 2024

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.

- **Previous Board Action:** 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 21, 2023 THROUGH JANUARY 26, 2024 Oakland University Board of Trustees Formal Session February 2, 2024 Page 2

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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 NOVEMBER 21, 2023 THROUGH JANUARY 26, 2024.

9. Attachments: A. Gifts and Pledges Report.

Submitted to the President on $\sqrt{29}$, 2024 by

Michael Westfa

Vice President

University Advancement

Recommended on 130

to the Board for approval by

Ora Hirsch Pescovitz, M.D.

President

Reviewed by

Joshua D. Merchant, Ph.D.

Chief of Staff and

Secretary to the Board of Trustees

DONOR ID: 306967		\$511,000.00
\$500,000.00 <u>Pledge</u>	for Pontiac Collective Impact Gift	
\$5,000.00 <u>Gift</u>	for OU Fund	
\$5,000.00 <u>Gift</u>	for OU Fund	
\$1,000.00 <u>Gift</u>	for MBE Interpretive Facilities	
DONOR ID: 62231		\$200,000.00
\$93,500.00 <u>Gift</u>	for Barbara A. Calam Oncology Nursing Endowed Scholarsh	ip
\$47,000.00 <u>Gift</u>	for Calam-Malek Endowed Pediatric Nursing Scholarship	
\$47,000.00 <u>Gift</u>	for Calam-Malek Endowed Pediatric Nursing Scholarship	
\$6,500.00 <u>Gift</u>	for Barbara A. Calam Oncology Nursing Endowed Scholarsh	ip
\$6,000.00 <u>Gift</u>	for Calam-Malek Endowed Pediatric Nursing Scholarship	
DONOR ID: 205451		\$100,000.00
\$90,000.00 <u>Pledge</u>	for The Garrity Scholarship for Excellence in Systems Engine	eering
\$10,000.00 Pledge	for The Garrity Scholarship for Excellence in Systems Engine	eering
DONOR ID: 370378		\$85,000.00
\$85,000.00 <u>Gift</u>	for Men's Golf Gifts	
DONOR ID: 803682		\$75,951.77
\$75,951.77 Gift In Kind	for School of Engineering and Computer Science Gift Fund	
DONOR ID: 194405		\$75,000.00
\$75,000.00 Bequest	for Cibula Endowed Scholarship for Teaching Assistants	
DONOR ID: 340747		\$70,000.00
\$70,000.00 <u>Gift</u>	for Donna and Walt Young Study Abroad Endowed Scholars	hip Fund
DONOR ID: 871983		\$50,000.00
\$50,000.00 Pledge	for MBE Interpretive Facilities	
DONOR ID: 114		\$49,000.00
\$25,000.00 Pledge	for Judith K. Brown Endowed Lecture in Anthropology & Soc	iology Endowment
\$24,000.00 <u>Gift</u>	for Judith K. Brown Endowed Lecture in Anthropology & Soc	iology Endowment
DONOR ID: 851215		\$40,000.00
\$30,000.00 <u>Gift</u>	for Oakland Press Endowed Scholarship for Journalism Exc	ellence
\$10,000.00 Gift	for Bunting & Briggs Freedom of the Press Scholarship Endo	owment

DONOR ID: 311219		\$38,900.00
\$15,000.00 <u>Gift</u>	for Bernard & Nina Kent Judaic Studies Endowed Israel Trave	el Fund
\$10,000.00 <u>Gift</u>	for Renee Tull Endowment Scholarship	
\$2,500.00 <u>Gift</u>	for The Dennis Pawley Institute	
\$2,000.00 <u>Gift</u>	for Erfan Faridmoayer Memorial Fund	
\$1,750.00 <u>Gift</u>	for International Relations Scholarship Gifts	
\$1,000.00 <u>Gift</u>	for OUWB School of Medicine Student Emergency Gift Fund	
\$1,000.00 <u>Gift</u>	for OU Fund	
\$1,000.00 <u>Gift</u>	for SECS Project Gift Fund	
\$1,000.00 <u>Gift</u>	for OUWB School of Medicine Scholarship Fund	
\$500.00 <u>Gift</u>	for Morgan Behen Memorial Scholarship for Elementary Educ	ation
\$500.00 <u>Gift</u>	for SEHS Gift Fund	
\$500.00 <u>Gift</u>	for MBH Ambassador Membership Fund	
\$500.00 <u>Gift</u>	for OU Fund	
\$350.00 <u>Gift</u>	for Women's Cross Country Gifts	
\$350.00 <u>Gift</u>	for Men's Cross Country Gifts	
\$250.00 <u>Gift</u>	for SEHS Gift Fund	
\$250.00 <u>Gift</u>	for OU Fund	
\$250.00 <u>Gift</u>	for Mathematics & Statistics Gift Fund	
\$100.00 <u>Gift</u>	for CAS Gift Fund	
\$100.00 <u>Gift</u>	for OU Fund	
DONOR ID: 332723		\$35,000.00
\$30,000.00 <u>Gift</u>	for William & Mary Schwark Endowed Scholarship in Enginee	ering & Education
\$5,000.00 <u>Gift</u>	for Grace Whan Endowed Dance Scholarship	
DONOR ID: 836795		\$31,000.00
\$25,000.00 <u>Gift</u>	for Nursing Scholarship Endowment	
\$3,000.00 <u>Gift</u>	for Nightingale Legacy Endowed Scholarship for Nursing	
\$3,000.00 <u>Gift</u>	for MTD Dance Gift Fund	
DONOR ID: 187105		\$30,100.00
\$30,000.00 Pledge	for CORE Program Gift Fund	
\$100.00 <u>Gift</u>	for Pete Hovland Natatorium Endowment	

DONOR ID: 427	\$30,000.00
\$25,000.00 Pledge	for Moore Undergraduate Summer Research Endowment
\$5,000.00 <u>Gift</u>	for Moore Undergraduate Summer Research Endowment
DONOR ID: 857802	\$25,000.00
\$25,000.00 <u>Pledge</u>	for Pich Student Teacher Education Scholarship
DONOR ID: 636684	\$25,000.00
\$25,000.00 <u>Gift</u>	for Pete Hovland Natatorium Endowment
DONOR ID: 619087	\$25,000.00
\$25,000.00 <u>Pledge</u>	for Pete Hovland Natatorium Endowment
DONOR ID: 552678	\$25,000.00
\$25,000.00 Pledge	for Mezwa OUWB Recruitment Scholarship
DONOR ID: 327033	\$25,000.00
\$15,000.00 <u>Gift</u>	for Jan and Don O'Dowd Performing Arts Endowed Scholarship
\$9,000.00 <u>Gift</u>	for Don and Jan O'Dowd Endowed Graduate Student Award
\$1,000.00 <u>Gift</u>	for Don and Jan O'Dowd Endowed Graduate Student Award
DONOR ID: 908837	\$22,320.00
\$22,320.00 Gift	for Bette Salisbury Slowinski Endowment for OUCARES
DONOR ID: 813217	\$20,000.00
\$20,000.00 <u>Gift</u>	for SECS-Software Engineering & Program Languages
DONOR ID: 185112	\$16,727.64
\$10,000.00 Gift In Kind	for Bruce & Rose Austin End for Women's Basketball Life Skills
\$6,347.70 Gift In Kind	for Bruce & Rose Austin End for Women's Basketball Life Skills
\$379.94 <u>Gift</u>	for Bruce & Rose Austin End for Women's Basketball Life Skills
DONOR ID: 688500	\$15,000.00
\$5,000.00 <u>Gift</u>	for OUWB School of Medicine Scholarship Fund
\$5,000.00 <u>Gift</u>	for OUWB School of Medicine Auschwitz Exchange Program Gifts
\$5,000.00 <u>Gift</u>	for CAS-Judaic Studies Gift Fund
DONOR ID: 632036	\$13,900.00
\$10,000.00 <u>Gift</u>	for Men's Basketball Gifts
\$1,000.00 <u>Gift</u>	for Accounting and Finance Gift Fund SBA
\$600.00 <u>Gift</u>	for Mezwa OUWB Recruitment Scholarship

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.

\$500.00 <u>Gift</u>	for SHS-Gifts-ECLIPSE	
\$500.00 <u>Gift</u>	for OUCARES - Gift Fund	
\$500.00 <u>Gift</u>	for OU Fund	
\$500.00 <u>Gift</u>	for OUCARES - Gift Fund	
\$200.00 <u>Gift</u>	for Meadow Brook Hall Gifts and Donations	
\$100.00 <u>Gift</u>	for OU Fund	
DONOR ID: 681598		\$12,500.00
\$12,500.00 <u>Pledge</u>	for The Margaret J. Afheldt and Kevin A. Ball Physical Therapy	Scholarship
DONOR ID: 806821		\$10,000.00
\$10,000.00 <u>Gift</u>	for Placement Office Gift Fund	
DONOR ID: 762043		\$10,000.00
\$5,000.00 <u>Gift</u>	for Eva Otto Endowment for Undergrad Student Scholarship	
\$5,000.00 <u>Gift</u>	for Eva Otto Endowment for Undergrad Student Scholarship	
DONOR ID: 455861		\$10,000.00
\$10,000.00 Gift	for Newman Family Capstone Endowed Scholarship	
DONOR ID: 54027		\$10,000.00
\$8,000.00 Bequest	for Professor Joel Russell Endowed Scholarship in Chemistry	
\$2,000.00 Bequest	for Professor Joel Russell Endowed Scholarship in Chemistry	
DONOR ID: 339719		\$8,467.00
\$8,467.00 <u>Gift</u>	for School of Nursing Board of Visitors Fundraising	
DONOR ID: 216212		\$8,000.00
\$8,000.00 <u>Gift</u>	for Paul Morath Memorial Scholarship for Education Endowme	nt
DONOR ID: 328895		\$7,260.00
\$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	
\$500.00 <u>Gift</u>	for SBA - Scholars Gift Fund	
\$500.00 <u>Gift</u>	for Accounting and Finance Gift Fund SBA	
\$300.00 Gift	for Accounting and Finance Gift Fund SBA	
\$300.00 <u>Gift</u>	for Accounting and Finance Gift Fund SBA	
\$300.00 Gift	for Accounting and Finance Gift Fund SBA	
\$300.00 Gift	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	Gift	for SBA - Scholars Gift Fund	
\$300.00	Gift	for Graduate School Finish Line Endowed Scholarship	
\$300.00	<u>Gift</u>	for Graduate School Finish Line Endowed Scholarship	
\$300.00	Gift	for Accounting and Finance Gift Fund SBA	
\$300.00	<u>Gift</u>	for Accounting and Finance Gift Fund SBA	
\$300.00	Gift	for Accounting and Finance Gift Fund SBA	
\$200.00	<u>Gift</u>	for MTD Theatre Gift Fund	
\$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 Accounting and Finance Gift Fund SBA	
\$50.00	<u>Gift</u>	for Accounting and Finance Gift Fund SBA	
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\$50.00	<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 Accounting and Finance Gift Fund SBA	
\$50.00	Gift	for SBA Applied Technology in Business Gift Fund	
\$50.00	<u>Gift</u>	for SBA Applied Technology in Business Gift Fund	
\$50.00	<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 Accounting and Finance Gift Fund SBA	
\$30.00	<u>Gift</u>	for Accounting and Finance Gift Fund SBA	
\$30.00	<u>Gift</u>	for Accounting and Finance Gift Fund SBA	
\$25.00	<u>Gift</u>	for Accounting and Finance Gift Fund SBA	
\$25.00	<u>Gift</u>	for Accounting and Finance Gift Fund SBA	
\$25.00	<u>Gift</u>	for Accounting and Finance Gift Fund SBA	
\$25.00	<u>Gift</u>	for Accounting and Finance Gift Fund SBA	
DONOR ID: 283	3		\$6,500.00
\$3,000.00	<u>Gift</u>	for CAS General Scholarships	
\$3,000.00	<u>Gift</u>	for School of Nursing Scholarships	
\$500.00	<u>Gift</u>	for Meadow Brook Hall Gifts and Donations	

DONOR ID: 406889		\$6,000.00
\$6,000.00 <u>Gift</u>	for School of Health Sciences Scholarships	
DONOR ID: 300959		\$6,000.00
\$6,000.00 Gift	for SECS-Deans Material Support Gifts	
DONOR ID: 289579		\$6,000.00
\$6,000.00 <u>Pledge</u>	for Peterson Family Faculty Scholar	
DONOR ID: 247003		\$6,000.00
\$6,000.00 <u>Pledge</u>	for The Jaws Legacy Endowed Housing Scholarship	
DONOR ID: 6615		\$6,000.00
\$6,000.00 <u>Gift</u>	for School of Business Administration Gift Fund	
DONOR ID: 249734		\$5,500.00
\$2,000.00 <u>Gift</u>	for Women's Swimming and Diving Gifts	
\$2,000.00 <u>Gift</u>	for Men's Swimming and Diving Gifts	
\$1,000.00 <u>Gift</u>	for Pete Hovland Natatorium Endowment	
\$500.00 <u>Pledge</u>	for Graduate School Finish Line Endowed Scholarship	
DONOR ID: 473273		\$5,400.00
\$5,400.00 Gift	for Honors College Top Ten Fund	
DONOR ID: 425448		\$5,300.40
\$5,000.40 Pledge	for Chiu Family SBA Education Endowment	
\$300.00 <u>Gift</u>	for Meadow Brook Hall Gifts and Donations	
DONOR ID: 229154		\$5,136.48
\$5,136.48 <u>Gift</u>	for SECS Scholarships	
DONOR ID: 818528		\$5,000.00
\$5,000.00 Gift	for Mezwa OUWB Recruitment Scholarship	
DONOR ID: 584667		\$5,000.00
\$5,000.00 Gift	for Brian Meer Endowed Business Education Fund	
DONOR ID: 582398		\$5,000.00
\$5,000.00 <u>Gift</u>	for OU Fund	
DONOR ID: 536994		\$5,000.00
\$2,500.00 Gift	for Independent Bank Economic Scholarship	
\$2,500.00 <u>Gift</u>	for Independent Bank Completion Scholarship	

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: 291906		\$5,000.00
\$5,000.00 <u>Gift</u>	for OUWB School of Medicine Scholarship Fund	
DONOR ID: 252905		\$5,000.00
\$4,000.00 <u>Gift</u>	for Oakland University Scholarship Fund	
\$1,000.00 <u>Gift</u>	for Meadow Brook Hall Gifts and Donations	
DONOR ID: 234616		\$5,000.00
\$5,000.00 <u>Gift</u>	for Oakland University Foster Student Scholarship Fund	
DONOR ID: 94829		\$5,000.00
\$5,000.00 <u>Gift</u>	for Chris & Fred Killeen Endowed Scholarship for Computer Science	
DONOR ID: 24560		\$5,000.00
\$5,000.00 <u>Gift</u>	for Men's Basketball Advancement Fund	
DONOR ID: 663538		\$4,900.00
\$4,900.00 <u>Gift</u>	for Keeper of the Dream Named Scholarship Fund	
DONOR ID: 241048		\$4,900.00
\$4,900.00 <u>Gift</u>	for Keeper of the Dream Named Scholarship Fund	
DONOR ID: 475136		\$4,800.00
\$4,800.00 <u>Pledge</u>	for Mezwa OUWB Recruitment Scholarship	
DONOR ID: 366912		\$4,500.00
\$3,000.00 <u>Gift</u>	for OUWB School of Medicine Faculty Sponsored Scholarships	
\$1,500.00 <u>Gift</u>	for Men's Basketball Gifts	
DONOR ID: 196024		\$4,174.50
\$4,074.50 <u>Gift</u>	for Corona Family Completion Scholarship	
\$100.00 <u>Pledge</u>	for SBA-ACHIEVE Gift Fund	
DONOR ID: 791155		\$4,140.00
\$4,140.00 <u>Gift</u>	for H. Warren Tope and Marjorie Bertrand Tope Scholarship Fu	nd
DONOR ID: 232506		\$4,000.00
\$2,000.00 Gift	for OU Fund	
\$2,000.00 <u>Gift</u>	for CAS-Actuarial Science Gifts	
DONOR ID: 189083		\$4,000.00
\$4,000.00 <u>Gift</u>	for SECS Scholarships	

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: 620244		\$3,500.00
\$2,500.00 <u>Gift</u>	for Alumni Memorial Scholarship Endowment Fund	
\$1,000.00 <u>Gift</u>	for OU Fund	
DONOR ID: 400863		\$3,500.00
\$3,500.00 <u>Gift</u>	for CAS DEI Teaching Race in America	
DONOR ID: 303730		\$3,255.00
\$2,500.00 <u>Gift</u>	for SECS Project Gift Fund	
\$755.00 <u>Gift</u>	for SECS Project Gift Fund	
DONOR ID: 404		\$3,100.00
\$2,700.00 Gift	for Library Gifts-Unrestricted	
\$200.00 <u>Gift</u>	for Honors College Scholarship Fund	
\$100.00 <u>Gift</u>	for Organic Farms Gifts	
\$100.00 <u>Gift</u>	for Richard L. Pettengill Library Endowment Fund	
DONOR ID: 301076		\$3,034.50
\$1,600.00 <u>Gift</u>	for MBE Adopt an Artifact	
\$1,000.00 <u>Gift</u>	for Athletics Gift Fund	
\$300.00 <u>Gift</u>	for Athletics Gift Fund	
\$100.00 <u>Gift</u>	for Softball Gifts	
\$34.50 <u>Gift</u>	for Meadow Brook Hall Gifts and Donations	
DONOR ID: 774827		\$3,000.00
\$1,000.00 <u>Gift</u>	for Linda McCloskey English Award Endowment for Writing Exc	cellence
\$1,000.00 <u>Gift</u>	for Women's Cross Country Gifts	
\$1,000.00 <u>Gift</u>	for Men's Cross Country Gifts	
DONOR ID: 545045		\$3,000.00
\$2,400.00 <u>Gift</u>	for MPA Gift Fund	
\$600.00 <u>Gift</u>	for MPA Gift Fund	
DONOR ID: 340238		\$3,000.00
\$3,000.00 <u>Gift</u>	for Meadow Brook Hall Gifts and Donations	
DONOR ID: 297825		\$3,000.00
\$1,500.00 <u>Gift</u>	for Meadow Brook Hall Gifts and Donations	
\$500.00 <u>Gift</u>	for Meadow Brook Estate Collections Conservation Gift Fund	

\$500.00 <u>Gift</u>	for MBH Garden Club Gift Fund	
\$500.00 <u>Gift</u>	for OU Fund	
DONOR ID: 63		\$3,000.00
\$3,000.00 <u>Gift</u>	for CORE Program Gift Fund	
DONOR ID: 333361		\$2,600.00
\$1,600.00 <u>Gift</u>	for Mathematics & Statistics Gift Fund	
\$600.00 <u>Gift</u>	for Mathematics & Statistics Gift Fund	
\$400.00 <u>Gift</u>	for Mathematics & Statistics Gift Fund	
DONOR ID: 869225		\$2,500.00
\$2,500.00 <u>Gift</u>	for SHS-Healthology HELPS	
DONOR ID: 775105		\$2,500.00
\$2,500.00 <u>Gift</u>	for Keeper of the Dream Gift Fund	
DONOR ID: 584652		\$2,500.00
\$2,500.00 Gift	for SBA Economics Scholarships	
DONOR ID: 567214		\$2,500.00
\$2,500.00 <u>Gift</u>	for School of Health Sciences Scholarships	
DONOR ID: 337003		\$2,500.00
\$2,500.00 Gift	for MBH Organ Gift Fund	
DONOR ID: 295704		\$2,500.00
\$2,500.00 Gift	for Unmanned Ground Vehicle Competition	

TOTALS TO BE APPROVED

Num	ber	of D	onors
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\$2,500 and above 77
Less than \$2,500 1740
Total Donors 1817

Total Amounts

Gifts \$2,500 and above	\$880,167.42
Pledges \$2,500 and above	\$839,900.40
Bequest Intentions \$2,500 and above	\$85,000.00
Gifts-in-Kind \$2,500 and above	\$92,299.47
Total Gifts, Pledges, Bequests, Gifts-in-Kind \$2,500 and above	\$1,897,367.29
Total Gifts, Pledges, Bequests, Gifts-in-Kind less than \$2,500	\$320,628.61
Total Gifts, Pledges, Bequests, Gifts-in-Kind	\$2,217,995.90
ote: Total gift assets received Nov 21, 2023- Jan 26, 2024:	\$2,329,376.20

(includes outright gifts, gifts-in-kind, paid bequests and payments on pledges previously approved by the Board)