

## OU receives \$15 million gift

**O**akland University has received a \$15 million bequest – the largest single gift to the university in its history. The donation, given anonymously, will fund several programs, including a \$4 million lead gift to support the Oakland University Beaumont School of Medicine deanship. It also is the first lead gift for the medical school.

“This bequest will make a lasting impact on the future of this institution,” said Gary Russi, president. “It also means our university campaign is taking great strides forward, positioning us even stronger within the community and as a national university. I am especially pleased that the medical school, opening in 2010 in partnership with Beaumont Hospitals, will provide jobs and applied research capacity, and will address the impending physician shortage.”

A charter class of 50 students is anticipated.

“Unique by design, the medical school will prepare a physician to adapt to and embrace the changing demands of patient care in the 21st century. It will produce a physician with the ability to balance the art of science and medicine in a high tech environment,” Russi explained.

The remainder of the gift will support student scholarships, research endowments and program support. The donor has chosen a variety of areas that are of personal significance. The gift will ensure that these areas will be funded in the future. Created as a combination of a direct estate gift and a charitable gift annuity, the \$15 million donation will be a legacy of support for the university and its students.

“Charitable gift annuities are an option that will make the greatest impact on the chosen recipient areas,



President Gary Russi with students in a biomedical research laboratory on Oakland's campus.

while allowing the donor to preserve income for loved ones as well,” said Susan Davies Goepp, vice president for University Relations. “A gift annuity lets donors support the areas that mean the most to them in an effective, thoughtful manner.

“A gift annuity works well for donors who have appreciated assets and are anticipating needing an income stream from those assets,” she said.

Here's how it works: The donor transfers appreciated assets to fund a charitable gift annuity. His/her designated beneficiary, which could be her/himself or a loved one, receives an income from the annuity for life. After the beneficiary's death, the remainder of the

annuity is used as the donor designates. The donor receives a charitable deduction upon creating the annuity, and that deduction depends on the annuity's rate, the beneficiary's age, and the original amount invested.

“There are so many people who want to make a difference in the lives of Oakland University and its students,” said Goepp. “We rely on planned gifts such as this to fund research, scholarships and programs. It's a giving option that works effectively for both the donor and Oakland University.”

If you are interested in learning more about planned giving, please contact University Relations (248) 364-6150. ➤

## Pawley Alumni Leadership Challenge encourages others to follow their passion

**D**ennis (SEHS '82) and Carlotta Pawley believe in giving back to the organizations and institutions that have supported their success. A graduate of the School of Education and Human Services (SEHS), Dennis Pawley credits Oakland University as being a significant factor in his lifetime of personal and career achievement – in turn, the Pawleys have a long history of support for the university. With the Pawley Alumni Leadership Challenge, they now are calling on fellow alumni to step up to the plate.

A former Chrysler executive, Dennis Pawley has served two terms on the Board of Trustees, including a term as chair, and as co-chair of the Campaign for OU. Pawley said “As a leader it's important for me to set an example. We have an obligation – and that's a strong word but I believe it – to support the organizations and programs that helped make us successful. We need to give back so that others can experience success as well.”

The Pawley Alumni Leadership Challenge encourages Oakland University alumni, who have the financial ability, to follow the example of Dennis and Carlotta Pawley by pledging \$100,000 or more to a program, initiative or scholarship opportunity that they feel especially passionate about. The Pawleys will match the collective gift commitments with a \$600,000 gift to the SEHS. The gift will fund three endowments for undergraduates, graduate students or faculty for pursuing, promoting and facilitating learning in lean studies – a philosophy close to Dennis Pawley's heart.

In 2002, Pawley established the Pawley Lean Learning Institute to teach others the lean approach to conducting business, a concept that increases efficiency and streamlining processes. Through the Pawley Alumni Leadership Challenge award, Oakland will be able to offer opportunities for students and faculty to continue working in lean and building on the strong reputation of the Pawley Institute. The award will permanently endow a professorship, a faculty research award and two student scholarship awards.

For alumni who are ready to meet Pawley's challenge, he says the key is to choose an area that is important to them. Pawley said he chose the SEHS to benefit from the endowment because it is the school he attended, and also because “SEHS is all about people. I think we can reach the most people and make the greatest impact this way.”

Dennis and Carlotta Pawley are two of Oakland University's most committed and dedicated supporters. In 2004, Pawley Hall was named in the Pawley's honor in recognition of their \$4 million support for the university. In addition, Dennis Pawley is a recipient of the OU Distinguished Alumni Achievement Award in 2001 and the Distinguished Alumni Service Award in 2003.

“This gift not only supports the mission of the Pawley Institute, but moves Oakland University and the School of Education and Human Services toward our vision of delivering a distinctive educational experience that is complemented by the strength of our graduates and

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Carlotta and Dennis Pawley (SEHS '82)

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Bernard and Nina Kent

Kent donation to fund Judaic Studies travel

When Bernie and Nina Kent decided to make an endowed gift to Oakland University, they wanted their donation to make a difference in a new way.

"We had decided that we wanted to make an endowed gift to the university, but we did not know where we wanted the fund to be used," explained Bernie Kent, (Economics '71). "When we heard about the Judaic Studies program, we knew we had found our niche."

The Kents have established the Bernard and Nina Kent Judaic Studies Endowed Israel Travel Fund. Their gift will support enrichment travel for students in the program, including participation in archeological digs, internships and other travel abroad opportunities.

"The Judaic Studies program presented us with the chance to be in on the ground floor of a new program," Kent said. "Providing support for a student to travel to Israel as part of the program enhances the attractiveness of the program and enriches the education of the students."

The Judaic Studies minor in the College of Arts and Sciences was launched in 2007 as part of the Religious Studies program. The minor is designed to help foster understanding, tolerance and a broader knowledge base of the world. The minor consists of 20 credits, including an introductory religion course that provides a comparative grounding for understanding Judaism in relation to other major religious systems.

Other classes are taught on the subjects of civilization and culture, history and archeology, and literature and folklore. In addition, students may chose to complete a Jewish community service internship or an independent study.

The Kents believe that the travel opportunities will be an essential component of the total Judaic Studies program experience.

"We know many, many people who have traveled to Israel. Without exception, they have felt that this experience had an important impact on their life. For some, it was a life-changing event," said Kent. "We felt that this opportunity should be made available to Oakland students, particularly those taking the minor in Judaic Studies."

Students with a minimum grade-point average of 3.0 may apply for the endowment award by submitting an application and a detailed description of the proposed enrichment, educational or work experience plan in Israel.

Kent said that the endowed gift is a logical step in his relationship with the university. "Oakland University is an integral part of the southeast Michigan community. As a proud alumnus, it is important to provide financial support where we think it will make the most impact." ➔

Endowments build for the future



Endowments are critical to Oakland University's financial health and critical to the long-term growth and success of the institution.

Since Oakland University's first endowment was established in 1960 on behalf of the faculty and students of Pontiac Central High School for \$5,000, the endowment fund has grown to more than \$32 million.

When commitments to "Innovation and Opportunity – The Campaign for Oakland University," are realized, Oakland's endowment will stand at more than \$50 million.

"Endowments are a way to combine a donor's vision with Oakland University's needs and objectives," said Susan Davies Goepf, vice president for University Relations and executive director of the OU Foundation. "These gifts build a permanent financial foundation for Oakland University and make a lasting impact in the lives of our students."

Of Oakland's 155 endowments, 105 provide tuition support, with the others funding faculty positions, research, curricular enhancements, equipment and facilities.

"These contributions have touched innumerable lives by supporting OU's far-reaching programs of learning, discovery and engagement," said Goepf. "Endowments have played an important role in OU's growth and success."

Endowments at Oakland University can be established with a minimum commitment of \$25,000 payable over five years, and ongoing gifts can be added to endowed funds throughout one's lifetime. To establish an endowment, donors work closely with an OU development officer to develop guidelines and criteria for the use and disbursement of the funds.

"The lasting impact of endowed funds is one of the motivations for making endowment gifts," said Goepf. "A donor is able to memorialize or honor a person, or leave a lasting personal mark. It is important to many of our donors that they make a difference to OU and our students in perpetuity."

Endowments are guided and managed per university policy. Oakland does not draw from the principle, and only uses a portion of the earnings annually. This allows the university to reinvest a portion of the earnings in order to grow the funds and keep pace with inflation, ensuring the endowment continues to have the same earning power for future generations.

"Endowments are imperative for nonprofit organizations and universities," said Goepf. "For more than fifty years, Oakland University has benefited from these generous gifts and provided many students with an education they might not otherwise have been able to receive." ➔

Oakland University's Early Endowments

- In May 1960, Francis W. Staley, principal of Pontiac Central High School and Dana P. Whitmer, superintendent of the Pontiac Schools, established an endowment on behalf of the faculty and students of Pontiac Central High School with a gift of \$5,000. The market value of the endowment has grown to \$14,265 and has been generating annual awards of \$500.
- The Village Woman's Club of Birmingham and Bloomfield Hills established a scholarship in June 1960 with \$9,525. The market value has grown to \$24,584 and is currently generating approximately \$960 per year.
- The Mr. and Mrs. Roger Kyes Endowment provides awards to English majors. It was initiated with a \$10,000 gift in July 1960. Mrs. Kyes donated an additional \$40,000, bringing the endowments worth to \$109,795, generating \$4,000 per year for awards.
- Benjamin Anibal created The Benjamin H. Anibal Scholarship Endowment for engineering students in November 1964, with a gift of \$19,250. He also created the Mary Fogarty Anibal and Eleanor A. Burgum Memorial Scholarship with a gift of \$41,187.50. The market value of the gift is \$1,155,609, and approximately \$52,000 is distributed annually in scholarships.



Endowed professorship in nursing established by Crittenton

Twenty four students will be able to enroll in an accelerated two-year bachelor of science in nursing program each fall, thanks to a \$2 million endowed professorship in Oakland University's School of Nursing. The professorship was created by Crittenton Hospital Medical Center Foundation.

The endowment is designed to help change the education of nurses, providing a platform for bringing the highest level of care to patients.



Lynn Origen, Crittenton Hospital CEO, announcing the \$2 million gift to Oakland University's School of Nursing.

In addition, the professorship helps alleviate Michigan's anticipated nursing shortage of approximately 8,000 nurses by 2010. Although students have responded to the shortage by applying to nursing programs at near-record rates, nursing schools do not currently have the faculty to support them, forcing many schools to delay admittance for accepted students. At Oakland University, a student accepted into the School of Nursing may be asked to wait three semesters before they can begin the program. The Crittenton professorship will allow 24 more students to begin the accelerated BSN program in fall of 2008.

"This is an exciting partnership opportunity for Oakland University and Crittenton Hospital to help advance nursing as a profession and to provide our students with invaluable opportunities," said Linda Thompson Adams, dean, OU School of Nursing.

Students in the new program will conduct all of their clinical rotations at Crittenton Hospital, enabling the

students to become familiar with the hospital's methodology and allowing the hospital to help students plan their career paths.

Crittenton is especially interested in the opportunity to have more BSN-prepared nurses working with their staff in the hospital. "Research is showing that the higher the level of education the nurse has, the more quickly they are able to assimilate into their clinical practices," said Kathleen Van Wagoner, chief nursing officer, Crittenton Hospital Medical Center.

Critical thinking skills from university courses also help nurses as they work with both colleagues and patients. "When we partner with Oakland University, and their students come here, some of our staff are their preceptors. They're bringing their knowledge as students, and our nurses can in turn get new ideas from them," explained Van Wagoner.

The nursing professorship, which is expected to be on faculty by fall of 2008, will also conduct patient-



caption

focused research on the science and best practices of nursing, an area that has not received much attention to date.

"One aspect of this is to study how nurses can successfully create relationships with patients and their families. Patients and their families must have confidence and trust in their nurses, so that nurses can help them overcome any potential impediments to their recovery," Van Wagoner explained. ➔

Community Foundation funds Adams Entrepreneurial Fellow at OU INCubator

Business innovation...entrepreneurial drive... supportive resources...It's a package that equals success in today's business world, and it is the motivating factor behind Oakland University's SmartZone Business INCubator. Thanks to the support of the Community Foundation for Southeast Michigan, the program is another big step closer to achieving its goals.

With a \$98,100 fellowship funding an Adams Entrepreneurial Fellow at OU's business INCubator, the Community Foundation is continuing its long-standing support of the university.

Erin Strang, the recipient fellow, serves as assistant director of business innovation at OU INC. Strang is currently pursuing a master's degree in public administration at Oakland, and she is pleased to be a part of the innovative and supportive atmosphere.

"At OU INC, we want to help entrepreneurial businesses get up and running, we want to help existing businesses grow in hopes of creating new jobs in an effort to improve the region's economy," she said.

The OU INCubator supports existing and grows new technology-based and life science businesses with university resources, decision support system sessions, business counseling services and financial/capital acquisition assistance.

Strang has been the primary person involved in the development and implementation of the services offered through the OU INC Collaboratory.

"In order to accomplish our mission, OU INCubator needed to create an environment that would effectively nurture and support the sharing of information between the university, the OU INCubator, client companies, the investment community, corporations, government sponsors



Erin Strang, an Adams Entrepreneurial Fellow at OU INC

and global information sources," Strang explained.

The OU INC Collaboratory was born. A collaboratory, she explains, is essentially a "center without walls" in which participants can perform research without regard to physical location, interact with colleagues, access instrumentation, and share data and resources. Strang said they plan to eventually host three to four sessions each week providing a variety of services including:

strategic planning, primary and secondary market research, business plan development, angel and venture capital financing, intellectual property (IP), assessment management, grant writing and development and commercialization readiness assessments.

It's a project the Community Foundation is proud to support.

"The Community Foundation for Southeast Michigan is always looking for effective program and project ideas that can improve life in southeast Michigan," said Mariam Noland, president. "Through its programs supporting the development of entrepreneurial and strategic business solutions, the OU INCubator will have a long-term impact on the growth and economy of this region and

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DTE Energy gifts power School of Engineering and Computer Science



Fuel cell test bench

The DTE Energy and the DTE Energy Foundation are powering Oakland University's School of Engineering and Computer Science (SECS) with gifts to support research, student fellowships, programs and equipment.

"Michigan's college and university engineering programs are a tremendous resource for DTE Energy. We depend on them to provide the well-educated, highly skilled employees we need for our business to be successful," said Ron May, DTE Energy senior vice president, and chairman of OU's SECS Advisory Board. "The technological advancements and research that come from a program like the Fastening and Joining Research Institute are critically important to us and the energy industry as a whole."

SECS' Fastening and Joining Research Institute (FAJRI) received a commitment of \$150,000 to provide student fellowships for research at both the graduate and undergraduate levels, post-doctoral visiting scholar research fellowships, fastening and joining technology transfer, and technical publications, such as research briefs, technical reports and periodicals.

"This gift is an important part of our self-reliance plan to establish a long-term research relationship with the Department of Defense as a federally funded National

Center of Excellence in fastening and joining research and technology transfer," explains Sayed Nassar, founding director of FAJRI. FAJRI is a unique facility that pursues fundamental and applied research to develop and disseminate new technology for the fastening and joining of metals, composites, polymers and advanced lightweight materials.

The DTE Energy Foundation also provided a \$40,000 grant for Oakland University to obtain a fuel cell test bench, providing opportunities for student research and the addition of a laboratory course.

"This is an important acquisition for OU because we will be able to develop an understanding of fuel cells and provide the ability to test fuel cell design performance using the test bench," said Xia Wang, assistant professor, SECS. "We want to make sure that our engineering students and faculty researchers have a fundamental understanding of this technology."

Oakland is adding a laboratory curriculum to an existing class and there is potential to add more laboratories to other theory-based disciplines of engineering including chemical, mechanical and electrical. The grant also provided five undergraduate engineering students the opportunity to design and test a fuel cell through the Research Experience for Undergraduates program funded by the National Science Foundation.

"The gifts from DTE Energy will go a long way in supporting Oakland University's mission to provide research opportunities to our undergraduate and graduate students," said Pieter Frick, dean, School of Engineering and Computer Science. "Through FAJRI and the fuel cell test bench, we are able to offer distinctive learning experiences for our students." ➔

# INNOVATION AND OPPORTUNITY

Changing the future



Dear Friends,

This spring season brings news of several additional gifts to Oakland University from friends and alumni who have a greater good in mind for Oakland's students

and faculty, and society as a whole.

The lead gift featured in this issue represents sincere care and commitment by donor(s) who want to ensure the university's impact long into the future. The largest donation in OU's history, the gift will, in part, provide support for the Oakland University William Beaumont School of Medicine dean position, which will be filled this year.

In addition, the recently announced Pawley Alumni Leadership Challenge created by Carlotta and Dennis Pawley (SEHS '82) is intended to spur on alumni leadership giving. The Pawleys will match gifts with a gift of their own to fund initiatives close to their heart in the School of Education and Human Services.

I encourage our Oakland alumni to consider a gift to a program, department or scholarship that you feel especially passionate about that will make a lasting difference in society.

As Oakland strives to fulfill its ambitious mission and vision for the future, endowment funding is a critical component of our financial health, ensuring that scholarships continue to be awarded and that faculty positions, research, curricular enhancements, equipment and facility upkeep continue to be funded. Through wise stewardship and investing, Oakland has benefited over the years from generous endowment gifts and provided many students with an education they might not otherwise have been able to receive.

Collectively, our gifts continue to advance The Campaign for OU, which is closing in on its goal of \$110 million by 2010. To date, we have raised more than \$96 million in gifts and pledges. Without the generous donations of friends and donors, and the dedication of our committed volunteers who help guide our campaign, this would not be possible.

Thank you for all that you do to position Oakland for even broader reach and impact in the years to come as it delivers a distinctive undergraduate and graduate education.

Sincerely,

Susan Davies Goepf  
Vice President for University Relations  
and Executive Director, OU Foundation

10931



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*Thank you all for your support!*



"As one of the co-chairs of the Campaign for OU, I wanted to set an example that would give others a little push to get their attention, and encourage them to give back to Oakland University. I believe this challenge gift will help us reach our campaign goal, and take it even farther than we initially anticipated."

— Dennis Pawley (SEHS '82)

## Donor has designs on helping others succeed

Marjorie Simmons is committed to paying it forward. Thanks to a scholarship, she was able to attend college and forge a successful career as a businesswoman and managing principal in SHW Group, an architectural design firm in Berkley.

"I made a commitment that when I was able to, I would give other people the hand up that I received," Simmons said. "I firmly believe in the power of an education and what it can do to transform people's lives."

To fulfill the promise she made to herself, Simmons recently endowed a \$25,000 renewable scholarship to support an Oakland University pre-human resources development or pre-elementary education student during their entire undergraduate career at Oakland University. She also added \$5,000 so awards could be made immediately.

Simmons' relationship with Oakland University developed after her firm designed OU's award-winning Pawley Hall. The firm also was responsible for the Oakland Center addition and auditorium renovations in O'Dowd Hall.

As an active board member for the School of Education and Human Resources, Simmons was instrumental in planning a scholarship fundraiser last year for the school. In 2007, she received Oakland University's Distinguished Volunteer award.

"Margie is committed to the School and our students. We are pleased to have someone of her caliber give of her time, energy and resources to advance our School and its mission," said Mary Otto, Dean of the School of Education and Human Services. "The renewable scholarship will be of



Marjorie Simmons of SHW Group

great benefit to our students who struggle to find money to pay for college year after year."

Her time spent at Oakland has been eye-opening, Simmons said. "Serving on the advisory board for the School of Education and Human Services has been an education itself, learning about what the universities in our state face, as far as funding and resources. I also have learned how universities work and what they do for the community, in addition to education and giving degrees."

Simmons is also impressed with all the programs and services Oakland offers to the community. She enjoys bringing her teenage son to campus for Golden Grizzlies basketball games, and would be delighted if he attended Oakland.

"Dr. Russi and the board are doing an outstanding job of moving the university forward," she said. "They're doing a tremendous thing. OU is making an enormous contribution to the state as it helps transform Michigan from a manufacturing to a knowledge-based economy. I wanted to do what I could to help forward that vision." ➤

*Pawley Alumni Leadership Challenge continued from page 1*

research accomplishments," said Mary Otto, dean, School of Education and Human Services. "By being so actively involved in the programs and experiences that support Oakland, the Pawleys clearly demonstrate their passion for the success of this university."

Pawley is confident his fellow alumni will meet the Leadership Challenge, "Being an alumnus myself, I know that I probably wouldn't be as successful as I am if I hadn't gotten this great education from Oakland University. I know many people who feel the same way...and who will agree it's essential to give back to the institution that drove their success." ➤

*Community Foundation continued from page 4*

we are proud to support this endeavor."

In addition to supporting the Adams Entrepreneurial Fellowship, the Community Foundation also provided support for the School of Education and Human Services with a \$5,000 gift for the OUCARES program. The OUCARES program works to improve the lives of families and children with Autism Spectrum Disorder, by providing counseling, support groups, and therapeutic and recreational programs for families. ➤

For more information about INNOVATION AND OPPORTUNITY, contact Susan Davies Goepf, vice president for University Relations and executive director, OU Foundation  
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