Perseverance *Empowers Success*

2020 Report to Investors
FROM the CHANCELLOR and CHAIR

DEAR DONORS, COLLEAGUES, and FRIENDS,

We did it!

What began as an ordinary year quickly became extraordinary as the global pandemic overtook our nation, community and college. To assist with the challenges our students faced in 2020, the OCC Foundation stepped forward with the College to empower continued success.

With a herculean effort from faculty and staff, OCC shifted its instruction and student services from face-to-face to online. That effort allowed our students to persevere as they completed classes, earned credits toward their degrees, and stayed focused on their goals. Many of them needed a helping hand along the way, and thanks to your dedication and support we were able to provide it.

The pandemic has not slowed our students’ desire to better themselves through education, nor our commitment to their success. Our students will graduate as machinists, chefs, healthcare professionals, paralegals, public safety officers and much more. They will continue to enrich the community for years to come with the knowledge and experiences they gained at OCC. Those experiences include your support of their aspirations, and how it empowered them to continue through a global pandemic.

On the facing page, you will find highlights of the many ways your support of the OCC Foundation has enabled us to persevere. This impact includes enhanced scholarships, emergency aid, vital technology and zero-cost textbooks. Most of all, your support shows our students and community that OCC cares and will do all it takes to achieve success.

Thank you. Your act of generosity ripples out through family, friends and the whole community

Peter M. Provenzano, Jr.
Chancellor
Oakland Community College

Richard A. Berkfield, Jr.
Chair, Board of Directors
Oakland Community College Foundation

OCC is committed to empowering our students to succeed and advancing our community.

The mission of the Oakland Community College Foundation is to obtain and allocate financial support to advance the mission and goals of Oakland Community College.
STORIES of PERSEVERANCE and SUCCESS

◆ **Best Year Ever:** In 2020, 412 donors contributed $765,938 to support our students and programs, a 53% increase over last year and our best annual fundraising total ever. The previous record of $601,108, set during a capital campaign for the Advanced Technology Building on the Auburn Hills campus, stood for nearly 20 years. From 2018 to 2020, donors have given more than $1.8 million to the Foundation, a new three-year record.

◆ **Donors Top the Challenge:** Thanks to the generosity of OCC employees, retirees, alumni and community sponsors, our year-end Matching Gift Challenge surpassed its goal of $88,000, raising $96,531 for the Student Success Fund. With Presenting Sponsor Kelly Services in the lead, 20 business and community partners committed $44,000 as a dollar-for-dollar match. About 140 donors responded, giving $52,530 to help students in crisis. (See page 17).

◆ **A Love of Learning Lives On:** Peter Strumbos was a lifelong learner and loyal donor who enjoyed taking classes in the arts and humanities at the Orchard Ridge campus. When he passed away in early 2020, he bequeathed $203,463 to OCC through a life insurance policy, our largest single gift to date. Mr. Strumbos gave his bequest in honor of Daniel A. Greenberg, Ph.D., retired humanities faculty member, to purchase film and video production equipment. Through his legacy, future students will be able to share his love of learning. (See page 18)

◆ **The Garden Party – Still Giving:** We missed the great food, wine, cars and people at The Garden Party this year, cancelled due to the pandemic. In spite of the cancelation, our generous partners at Great Lakes Wine & Spirits and The Garden Party Foundation, Syd & Elizabeth Ross and Lew & Susan Cooper, continued their support for self-sufficiency through the skilled trades with a six-figure gift. Their support sustained The Garden Party Vocational Scholarships in 2020.

◆ **Students Persevere through Crisis:** The Student Success Fund helps students facing a financial emergency stay in class and on track. This emergency aid program was redesigned in 2018 to provide more robust support and a speedier response. Since that time, gifts to the Student Success Fund have empowered 100% of recipients to successfully finish their semester, in spite of a financial crisis. Our intervention has secured safe housing, prevented utility shut-offs and provided transportation for students needing our help. Post-crisis, two-thirds of recipients have graduated or are continuing their studies at OCC.

◆ **Faculty Innovate to Reduce Costs:** With investments from the Provenzano Empowerment Fund for consulting and stipends, the faculty-led Open Education Resources (OER) project has replaced costly textbooks with free, high quality materials. Faculty introducing OERs in 2020 have saved 2,139 students more than $215,517 – money they would otherwise have had to spend on textbooks were it not for OERs. This positive impact will extend into future semesters for new students taking these courses.

◆ **Scholarships Grow:** In 2020, we reached a record number of students with scholarship opportunities and awards. More than 4,000 students applied for scholarships through our online system, up more than 900 from last year. The number of scholarships awarded increased to 518, thanks to a special summer semester application cycle targeting students in the health professions, public service academies and skilled trades. We also added eight new scholarships this year, increasing opportunities for our students. (See page 2)

◆ **Pandemic Response:** While adjusting to working remotely, the Foundation team stepped forward to help students through the pandemic. In addition to the special summer scholarship cycle noted above, we deployed our scholarship application infrastructure to identify students eligible for CARES Act emergency grants and new Summer Momentum scholarships. We informed students lacking home internet where to find free access. We provided computers to students lacking a suitable device through the Student Success Fund, and emergency book scholarships to students who could not afford their textbooks.

You can learn more at oaklandcc.edu/foundation.
Gifts of at least $1,000 create expendable funds for named scholarships. Gifts of at least $10,000 establish named endowed funds that continue in perpetuity.

Our donors fund tribute and memorial scholarships to create a lasting impact.
Each new scholarship recipient is a part of a living legacy.
Visit oaklandcc.academicworks.com/donors for profiles of our scholarship sponsors. • Bold = new for 2020.

**ANNUAL**

AAUW - Birmingham Excellence Award Scholarship
AAUW Farmington Hills Annual Scholarship
AAUW Northville-Novit Annual Scholarship
Assistance League of Southeastern Michigan Scholarship
Robert Austin Memorial Scholarship
Automotive Servicing Certificate Scholarship

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Recognition level based on total household giving between January 1, 2020 and December 31, 2020. (Years of giving follow name.)

The following individuals, corporations, foundations & organizations have invested in education by giving to the Oakland Community College Foundation.

We make every attempt to ensure our donor information is accurate; however, if you find an error, please contact us at 248.341.2137 or email occfoundation@oaklandcc.edu.

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LOYALTY SOCIETY: MILESTONE YEARS of GIVING

In 2020, these donors reached a significant milestone in the total number of calendar years they have supported the Foundation. We celebrate here their loyalty and commitment.

**35 YEARS**
Dr. Kathleen Lorencz

**30 YEARS**
Ms. Linda L. Pososki
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Richard & Nancy Thompson

**25 YEARS**
AAUW - Birmingham Branch MI4010
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OCC Faculty Association

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In Memory of George Mosher

George R. Mosher, Jr. occupies a unique and cherished place in Oakland Community College’s history. Many call him OCC’s “Founding Father.”

Mr. Mosher was instrumental in campaigning for the creation of OCC. He was elected to serve on the first OCC Board of Trustees in 1964, and continued as Board Chair until 1970. After twice winning reelection, he concluded his Board of Trustee service in 1976.

His years of service to OCC changed the face of education in Oakland County. In gratitude for his passion and dedication, we celebrate his life and legacy.

These gifts in his memory were designated to the Doris & George Mosher Endowed Scholarship Fund.
<table>
<thead>
<tr>
<th>Name</th>
<th>Association or Position</th>
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<tbody>
<tr>
<td>Dr. Maurice McCall, Ph.D.</td>
<td>Ms. Mozell Y. Davis</td>
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<td>Dr. Alvin C. McCall</td>
<td>Ms. Eileen McCall</td>
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<td>Mr. Gerald Meller</td>
<td>Dr. Kathleen Lorencz</td>
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<td>Sidney Morrison</td>
<td>Dr. Kathleen Lorencz</td>
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<td>Alice Nichols</td>
<td>Nicholas Abid, D.O.</td>
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<td>James &amp; Margaret Boussum</td>
<td>Dr. Kathleen Lorencz</td>
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<td>Ms. Lisa Ochoa</td>
<td>Dr. Kathleen Lorencz</td>
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<td>Mr. Kenneth Oxley</td>
<td>Dr. Kathleen Lorencz</td>
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<td>Mr. Donald Pagenette</td>
<td>Mrs. Karen J. Pagenette</td>
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<td>Ms. Anita G. Palazzolo</td>
<td>Ms. Susanne Haacke</td>
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<td>Nursing Faculty</td>
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<td>Amida Paramo</td>
<td>Mr. James Paramo</td>
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<td>Mr. Anthony V. Racka</td>
<td>OCC Faculty Association</td>
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<td>Ms. Senora Reaves</td>
<td>Ms. Candy R. Geeter, M.Ed.</td>
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<td>Dan &amp; Liza Jenuwine</td>
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<td>Ms. Sandi Roby</td>
<td>AFSCME Local 2042</td>
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<tr>
<td>Mr. Frederic M. Rohrbach</td>
<td>Mr. Michael Betman</td>
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<tr>
<td>Judith Roman Scavnicky</td>
<td>Dr. Gary Scavnicky</td>
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<td>Mrs. Mary C. Schmitt</td>
<td>Dr. Kathleen Lorencz</td>
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<td>Ms. Dorene H. Shank</td>
<td>Mr. Daniel A. Stemmer</td>
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<td>Mrs. Deborah M. Swanson</td>
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<td>Mrs. Janice Simmons</td>
<td>Lloyd C. Crews, Ph.D.</td>
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<td>Mrs. Sallie Sneed &amp; Ms. Jeanne Sneed</td>
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<td>AFSCME Local 2042</td>
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<td>Mr. John W. Almstadt</td>
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<td>Mr. Scott Vance</td>
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<td>Aaron &amp; Mary Vance</td>
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<td>Ms. Nancy Ellen Vance</td>
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<td>Ms. Charissee J. Neal</td>
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<td>Ms. Cheryl D. Blake</td>
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<td>Ms. Charissee J. Neal</td>
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<td>Ms. Breonna Warren</td>
<td>Ms. Joanne Forbes</td>
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<td>Ms. Janet Roberts</td>
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<td>Mr. John Yenkel</td>
<td>Dr. Kathleen Lorencz</td>
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<td>Mr. Brian Yerkes</td>
<td>Anonymous</td>
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<td>Ms. Diane C. Fisher</td>
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<td>Ms. Cheryl A. Kozell</td>
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<td>Clint &amp; Judi Yerkes</td>
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<td>Ms. Joyce A. Zurel</td>
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<tr>
<td>Mr. Chester Zwolak</td>
<td>Ms. Cari L. Rummel</td>
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Mrs. Rhonda R. Brown

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Livingston County EMS
Royal Truck & Trailer Sales and Service
Troy Fire Department
Troy Police Department
Mr. Donald E. Wujek
STUDENT SUCCESS FUND MATCHING GIFT CHALLENGE: FALL 2020

We thank the 20 business and community partners below who inspired our employees, retirees, alumni and friends to support the Student Success Fund by sponsoring a dollar-for-dollar match. Together we raised $96,531 to help students in crisis.

The Student Success Fund is designed to quickly help students who are in the middle of a crisis so they stay in class and on track. The consequences of a student dropping out are enormous and long lasting. Your support when a student is facing a financial challenge is incredibly powerful. In the last two years, 100% of students receiving help from the Student Success Fund have successfully completed their semester, in spite of the unforeseen hardship.

Presenting Sponsor:
Kelly

Excellence Sponsor:
Suburban

Empowering Sponsors:

Success Sponsors:
Anderson, Eckstein & Westrick, Inc.
Auch Construction, Inc.
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Interact Communications
Midwest Strategy Group
TMR & Associates, Inc.
Vanguard Public Affairs, Inc.
Walsh College
ESTATE AND PLANNED GIVING

The Legacy Society is our way of recognizing supporters who have made OCC and the students we serve a part of their personal legacy. Members demonstrate their foresight and generosity by naming the OCC Foundation as a beneficiary of their will or trust; insurance policy; bank, investment, or retirement account; or other estate-planning vehicles.

Membership in the Legacy Society involves no dues or obligations. It simply allows us to thank these donors for the plans they have made.

Anonymous (3)
Richard A. Berkfield Jr & Karen Swift Berkfield
Linda Grace Buchanan
Estate of Cheryl Feinberg
Dennis Fiems
Mr. Nicholas Thines & Mrs. Barbara J. Frey
Edward A. Gallagher
Mr. & Mrs. Jeremy D. Hampshire
Margaret Hinkle* & Joan Hinkle
Gregory* & Cheryl Kozell
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LeRoy & Carole Salowich
Lynne Schank
Basil Sherlund*
Michael Soldan
Dennis Souter
Estate of Peter Strumbos*
Sandra E. Thornton
Phyllis Langley Valle
Nancy Ellen Vance
Scott & Danielle Yackley
Chuck Yeramian

**Bold = new for 2020.**

* = deceased

**Peter W. Strumbos**

Peter Strumbos worked in the film industry, the stock market and his family’s automotive supply business. He was a caring son who supported his mother through recovery from a stroke until her passing. Mr. Strumbos had a passion for the arts and humanities, taking many courses at OCC over the years. He was a self-taught painter, accomplished pianist and loved the cinematic arts. His bequest, the largest single gift to date in the Foundation’s history, will allow future students to share his love of learning through the purchase of film and video production equipment. We are grateful to Mr. Strumbos for entrusting us with his legacy.

Peter W. Strumbos
March 16, 1954 - February 24, 2020
**Fiscal Year 2019-20 Financial Information**

**Net Assets**

<table>
<thead>
<tr>
<th></th>
<th>2020</th>
<th>2019</th>
</tr>
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<tbody>
<tr>
<td>Without Donor Restrictions</td>
<td>$3,211,472</td>
<td>$3,232,736</td>
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<tr>
<td>With Donor Restrictions</td>
<td>3,815,525</td>
<td>3,433,680</td>
</tr>
<tr>
<td><strong>Total Net Assets</strong></td>
<td><strong>$7,026,997</strong></td>
<td><strong>$6,666,416</strong></td>
</tr>
</tbody>
</table>

**Designation of Gifts**

- Student Scholarships: $621,862.98
- Emerging College Needs (Unrestricted): $6,240.00
- Community Services & Projects/Academic Programs: $137,185.00

**Total Designation of Gifts:** $765,287.98

**Sources**

- Individual Donors: $430,330.33
- Corporations: $56,360.00
- Professionals & Service Organizations: $90,587.00
- Local & National Foundations: $188,010.65

**Total Sources:** $765,287.98

*Audited financial statements are available on request.*
Donors to the OCC Foundation have many ways to give, and many choices for their support.

- Give to an existing fund to support the scholarship, academic program, special project, or campus facility of your choice.
- Create and name a new expendable or endowed fund. Designate your support to the part of OCC most important to you. Minimums apply.

There are many ways to provide support:

- Sustaining Gifts - Made regularly on an annual, monthly, or more frequent basis.
- Tributes and Memorials - Made to celebrate a loved one, friend, colleague, company, or organization.
- Estate Gifts - Made by naming the OCC Foundation as a beneficiary of a will or trust; insurance policy; bank, investment, or retirement account; or other vehicle.
- Matching Gifts - Made by some employers to multiply the effect of their employees’ giving. Requires employee to submit appropriate form.

And many vehicles for giving:

- Check made payable to the OCC Foundation.
- Credit card. American Express, Discover, MasterCard, and VISA accepted.
- Stock transfer through your broker.
- IRA Qualified Charitable Distribution through your plan administrator.
- Online at oaklandcc.edu/foundation.
- Payroll deduction for OCC employees through Human Resources.
- Automatic Bill Pay through your bank or credit union.
- Transfer of real estate or real property (aka Gift in Kind).
- Beneficiary Terms through your estate plan.

For more information on any of these options, contact the OCC Foundation at 248.341.2137 or occfoundation@oaklandcc.edu.
DORIS MOSHER
IN MEMORIAM
Doris Mosher, the “Mother of OCC,” passed away October 19, 2007. In memory of her life and accomplishments, the OCC Foundation Board of Directors reserves a seat in her name.
Thank you for your support!
Giving is easy online.
oaklandcc.edu/foundation