

*The Joseph A. Alutto*

# GLOBAL LEADERSHIP INITIATIVE



*The Joseph A. Alutto Global Leadership Initiative was created in May 2013 by The Ohio State University to honor the Interim President and former Executive Vice President and Provost as well as Dean of the Max M. Fisher College of Business for his deep commitment to advancing international educational opportunities.*

The Initiative provides undergraduate and graduate students at Fisher with the necessary financial resources to engage in innovative global learning experiences through scholarships, programs, partnerships and action-based projects around the world.

- The Ohio State University will match—dollar for dollar—every gift up to \$4 million made to the Joseph A. Alutto Global Leadership Initiative.
- All gifts will be designated as part of the Joseph A. Alutto Global Leadership Initiative. The Alutto Global Leadership Fund, an endowment fund focused on global education for Fisher students, has been established in support of this Initiative.
- Gifts of \$25,000 or more will be matched and enable donors to establish—in their name—an endowment fund focused on global education.
- Donors pledging support of \$25,000 or more to the Joseph A. Alutto Global Leadership Initiative will receive recognition for their generous contribution on a display located on the Fisher College of Business campus.



*“Our network of global experts and alumni share their experiences with our students and help them develop a deeper appreciation of other cultures and ideas. We believe this exposure is essential for lifelong learning as well as effective leadership.”*

—Joseph A. Alutto

## Contact us

How and where you choose to make your philanthropic impact is a very personal decision. Contact a team member in the Office of Advancement to explore giving opportunities that match your interests and passions at Fisher.

☎ 614-688-3197

✉ [givetofisher@osu.edu](mailto:givetofisher@osu.edu)



**THE OHIO STATE UNIVERSITY**

FISHER COLLEGE OF BUSINESS

# GLOBAL LEADERSHIP INITIATIVE

## Pledge intentions

The goal of the Joseph A. Alutto Global Leadership Initiative is to encourage donors to provide undergraduate and graduate business students with financial resources for global learning through scholarships, programs, and other opportunities thereby enabling them to engage in critical, action-based, learning experiences around the world. Commitments that meet the minimum funding requirement will be eligible for establishing a donor-named International Scholarship Fund as part of the Alutto Global Leadership Initiative.

Intentions of \_\_\_\_\_ [Donor(s)]:

► The Donor(s) will contribute the sum of \$ \_\_\_\_\_ to The Ohio State Foundation to establish the \_\_\_\_\_ International Scholarship Fund.  
*(insert preferred name)*

► The gift will be completed by the Donor according to the following timeline  
*(insert payment amount by Month Date, Year):*

\$ \_\_\_\_\_ by \_\_\_\_\_, 2017

\$ \_\_\_\_\_ by \_\_\_\_\_, 2018

\$ \_\_\_\_\_ by \_\_\_\_\_, 2019

\$ \_\_\_\_\_ by \_\_\_\_\_, 2020

\$ \_\_\_\_\_ by \_\_\_\_\_, 2021

*Should the commitment not reach the minimum to create a named endowment, the funds will be directed to The Joseph A. Alutto Global Leadership Scholarship Fund (640139).*

The distribution from the endowed fund will be used to provide scholarship(s) to undergraduate or graduate students enrolled in Fisher College of Business pursuing critical, action-based learning experiences around the world.

This gift is eligible for The Joseph A. Alutto Global Leadership Initiative dollar-for-dollar matching gift program. To the extent the allocated University matching funds remain available, the University agrees to match the total pledged commitment from the donor as payments are received. *Upon completion of this pledge should the Donor choose to make any additional gifts to this fund, the University will match gifts until such time when the matching resources have been completely allocated to the Initiative.*

► Donor Signature \_\_\_\_\_ Date \_\_\_\_\_

► Donor Signature \_\_\_\_\_ Date \_\_\_\_\_  
*(if applicable)*



# GLOBAL LEADERSHIP INITIATIVE

## Gift Agreement/Pledge Intention Addendum

The Ohio State University Foundation | 1480 W. Lane Avenue, Columbus, Ohio 43221

### **Donor Recognition for Gifts from Individuals** *(if applicable)*

Appropriate recognition in any annual or permanent donor recognition societies, including, but not limited to, President's Club, Buckeye Club, Neil Legacy Society, and Oval Society, will be extended to Donor(s) unless declined in writing by Donor(s). Eligibility for recognition is based on the charitable gifts made directly by Donor(s). If gifts from third parties are intended to satisfy a personal commitment of Donor(s), donor recognition will be evaluated separately. Donor(s) is/are responsible for any tax issues that may arise in these circumstances with respect to Donor(s).

### **Publicity**

News of this gift may be shared with University publications and websites, as well as other media as appropriate, unless declined in writing by Donor(s). All news items shall be published at the editors' discretion. The University is required by law to release the names of all donors and the date, amount, and terms of their gifts if a public records request is received asking for such information. Therefore, declining gift publicity will not ensure that a gift remains confidential.

### **Namings**

The naming of endowed funds require approval from the University's Board of Trustees. If at any time following the approval of a naming, circumstances change so that the continued use of the name may compromise the integrity or reputation of the University, the University may remove the name. The name will not be removed without the approval of the President and the Board of Trustees and notification to Donor(s), if possible.

### **Endowed Funds** *(if applicable)*

Unused annual distributions from endowed funds are held in the distribution account to be used in subsequent years and only for the purposes of the endowment or reinvested in the endowment principal at the discretion of the appropriate dean or director, unless otherwise specified by Donor(s).

The University and the Foundation reserve the right to modify the purposes of an endowed fund (1) in consultation with the Donor(s) creating the fund, or (2) if such fund's purposes become unlawful, impracticable, impossible to achieve, or wasteful, provided that such fund shall only be used for the University's charitable purposes. In seeking such modification, the University and the Foundation shall consult the appropriate college dean, school director, department chairperson, or program administrative officer. Modifications to endowed funds shall be approved by the University's Board of Trustees and the Foundation's Board of Directors in accordance with the policies of the University and Foundation.

### **Gift Administration**

The endowment of The Ohio State University is managed by the Office of Investments and administered by the Office of the Controller as directed by The Ohio State University Board of Trustees with representation from The Ohio State University Foundation Board of Directors. Annual endowment distribution is determined by The Ohio State University Board of Trustees. The endowment distribution-per-share is calculated on a seven-year moving average of the market value-per-share. The Foundation retains a one-time fee on new endowment funds equal to the first six months of distribution to offset fundraising costs. An annual fee is assessed against the endowment portfolio for costs of fundraising and fund management.

Current use cash gifts are held in an interest-bearing account by the Foundation for 180 days and interest earned during that period is retained by the Foundation for budget offset.