

[REDACTED]

From: [REDACTED]
Sent: Wednesday, November 17, 2021 7:23 PM
To: [REDACTED]
Subject: Dan Besselsen

WebEx 11/17/2021

SA [REDACTED]

- GX 742 – application for arts camp, summer only. 4- or 8- weeks in the 1990s. This is summer 1998.
 - Dan wasn't at Interlochen in the 90s, but it was in paper at the time. Now online. This one appears to have been faxed, likely to the admissions group (will confirm) from a parent
 - Top left: 3-3 is March 3. Admissions keeps track of date, b/c admissions are rolling after priority deadline of 2/15.
 - Knows this from experience at Interlochen over the last 16 years, being involved somewhat with the financial aid piece of the admissions process for the HS
 - There is also a person in the admissions office who he can talk to who has been there since the 90s
 - Will confirm but the red markings are probably from admissions staff
 - For applications now, have to have artistic talent to get in, so normally there would also be audition materials or artistic recommendations.
 - When applications come in, it's now reviewed by an admissions officer. Will confirm that it worked the same way in the 90s. Broken out by age or, for older kids, artistic area
 - This application has other pages, including the signed enrollment agreement as it relates to tuition (which has camper, parents, and someone from the admissions office)
 - Interlochen has a record retention policy, and within that, educational records they keep for 99 years. There's a file for each student with all sorts of information.
- Dan has found each exhibit in Interlochen's files
- [REDACTED] came to camp for 2 summers, took a year off, came to the high school in 1999 for two years as a junior and senior. Looks like JE paid some of the HS tuition
- GX 743 –
 - Appears that the first few pages are an application for summer arts camp in 1994
 - Pp. 4-5 are for summer camp in 1995
 - Last two pp are summer camp for summer 1996
 - Appears that they changed the layout in summer 1996
 - Camper in GX 742 also came in 1997 and the application looks a lot like the summer 1996 one for GX 743
 - In the file, the photos on p.3 were stapled to the first application, for summer 1994
 - There's also a card in the file with a photo of [REDACTED] Not sure why – not something the application calls for or something DB has seen before
 - These applications also have more pages – the artistic recommendation, academic rec, additional comments.
 - First page is dated in bottom right, probably date received. Above that is this camper's area [REDACTED]
 - Will ask about other markings
- GX 744 –
 - Got access, ran this exact report
 - Could reformat
 - IT says that completion years is an education record field in SF. Prior to SF, used other software. Completion year has followed different software over the year

SUBJECT TO PROTECTIVE ORDER PARAGRAPHS 7, 8, 9, 10, 15, and 17

- Now, use SF through the whole process. When someone applies, the completion year is automatically generated in SF within the student record
- GX 741 –
 - Interlochen no longer keeps paper copies of donations, but in the 90s they did. Interlochen keeps old donor records forever, paper copies are kept in filing cabinets in the basement of a dorm. E.g. the Epstein file goes back to the 80s
 - It is Interlochen’s practice to keep all correspondence with donors, including emails, tax receipts, checks if large enough, records of meetings. Do it because people in philanthropy (aka “advancement”) come and go, so want to be able to see the whole history. Or will work with the child of a donor, want parent’s records. Also keep correspondence received from donors, probably for the same reason. Long term relationship between Interlochen and donor.
 - Will confirm but it appears that it worked the same way in the 90s. Dan’s boss has been around since the 90s.
 - There are more documents that are not part of the exhibit
 - P. 2 CC Dave Stave – CFO at the time; Pat Kessel – current CFO. Peg Johnson was Interlochen employee
 - P. 4 acknowledges the two prior gifts. Auditors always look for acknowledgement letters to proof that the contribution actually happened
 - P. 6 – in file b/c part of donor relationship
 - Epstein Lodge still exists. It’s been renamed – it’s now L-95, may have another name. DB has had meetings in there.
 - P. 7 – looks like an email from Ambrose from someone probably in the operations department. Dan Bauer is an employee. DB will find out more. Looks like Interlochen kept stuff here as part of JE’s inventory (See prior page)
 - P. 8 – thank you letter
 - P. 9 – tax acknowledgement letter
 - P. 10 – thank you letter, probably same donation as previous letter
 - P. 11 – donation
 - P. 12 – tax acknowledgement letter
 - P. 13 – Peg Johnson (cc’d on page 2), fundraising to finance. There is a \$25K donation at this time. \$15K into donor restricted fund, \$10K into scholarship fund. This email says to move \$1600 from one donor restricted fund into another. 557500 is a “Trustee Special Fund,” from 570004, titled “Designated Fund.” DB didn’t see an explanation there.
 - P. 14 – tax acknowledgement letter – World Youth Symphony Orchestra is part of summer camp. Must have been campers going to the 96 Olympics
 - P. 15 – thank you note for same gift.
 - P. 16 – thank you and tax acknowledgement letter. This is the modern practice.
 - P. 17 – original donation letter, p. 18 is a copy
 - P. 19 – 1992, JE must have underwritten the cost of the reception
 - P. 20 – tax acknowledgement letter and letter about the particular student. Now, it’s against IRS rules for a donor to give a scholarship to a particular student and get a tax receipt.