



OFFICE OF THE CHANCELLOR  
2147 MURPHY HALL  
BOX 951405  
LOS ANGELES, CALIFORNIA 90095-1405

April 17, 2014  
DA 730.02

**VICE CHANCELLOR, EXTERNAL AFFAIRS RHEA TURTELTAUB  
ASSOCIATE VICE CHANCELLOR, EXTERNAL AFFAIRS JULIE SINA  
EXECUTIVE DIRECTOR, DONOR RELATIONS CAROL BUGE  
DIRECTOR, GIFT POLICY AND AGREEMENTS WILLIAM KINSELLA  
DIRECTOR, FUND MANAGEMENT STEPHANIE BRADFORD**

**Delegation of Authority - Soliciting, Accepting and Returning Gifts**

- References:**
- (a) Regents' Standing Order Section 100.4 (v);
  - (b) UC DA 2011 (To Solicit and Accept Gifts) to Chancellors, et al., dated March 23, 1994;
  - (c) UC DA 2579 (Authority to Return Gifts) to Chancellors, et al., dated February 5, 2014;
  - (d) UC DA 2018 (To Approve and Conduct Fundraising Campaigns) to Chancellors, et al., dated May 26, 1994);
  - (e) UC Administrative Guidelines for Campus Foundations, February 12, 2004.

**Supersedes:** UCLA DA 730.01 (Soliciting, Accepting, and Returning Gifts) to Vice Chancellor Eicher, et al., dated February 28, 2006.

Effective as of the date above, I hereby delegate to your positions, in your respective areas of responsibility, in accordance with the relevant provisions referenced in (a), (b), (c), (d), and (e) above, and the conditions set forth in the attached matrix (Attachment A), authority to solicit, accept, and return gifts. In all cases, the gifts must be for existing academic or previously approved programs not requiring the approval of the President or The Regents. The UCLA Foundation may accept gifts in accordance with the provisions of Section II.J of the UC Administrative Guidelines for Campus Foundations.

In the exercise of the authorities described above, External Affairs officials and other officials, acting on behalf of External Affairs or the UCLA Foundation, will be governed by the conditions set forth in UC DA 2011, dated March 23, 1994 (Attachment B).

Regental, Presidential, or Chancellorial authorization is required for solicitation or acceptance of any gifts that involves:

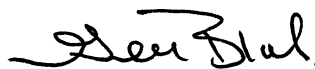
- any gift over \$5,000,000 (Presidential approval);
- any gift over \$1,000,000 up to \$5,000,000 (Chancellorial approval);

- an exception to approved University programs or policies (Regental approval);
- an obligation on the part of the University to expenditures or costs for which there is no established fund source (Regental approval);
- construction of facilities not previously approved (Regental approval);
- an interest in real property (Regental or Presidential approval, as appropriate);
- an endowed chair or professorship (Presidential approval; UC Policy APM-191);
- naming of University properties, programs and facilities (Presidential or Chancellorial approval as appropriate; UC Policy dated March, 1996; UCLA Policy 112);
- a fundraising campaign up to and including \$5,000,000 for any purpose (Chancellorial approval; UC DA 2018);
- a fundraising campaign over \$5,000,000 for any purpose (Presidential approval; UC DA 2018);
- the quiet phase of a fundraising campaign with a goal of \$250,000,000 or more (Presidential approval; Regents Policy 5201) and the public phase of a fundraising campaign with a goal of \$250,000,000 or more, shall be submitted to the President for endorsement (Regents Policy 5201).

This delegation includes the authority to return to the donor all or any unused portion of a gift of personal property, when the purposes of the gift have been fulfilled or fulfillment has become impossible or impractical and when alternative uses are precluded. General Counsel must be consulted prior to the return of any gifts. In the case of a gift of real property that required approval from the President, Treasurer, and /or The Regents, the return of the gift is subject to the same approval requirements as applied when you accepted the gift.

This delegation is being reissued due to the reissuance of parent UC delegation of authority 2579. Substantive changes to the delegation being superseded include, organizational change, adding a provision for the return of gifts of real property, Chancellorial approval for fundraising campaigns up to and including \$5,000,000, Presidential approval for the quiet phase of a fundraising campaign with a goal of \$250,000,000, and Presidential endorsement for the public phase of a fundraising campaign with a goal of \$250,000,000.

This authority may not be further redelegated.



Gene Block  
Chancellor

#### Attachments

cc: Executive Vice Chancellor and Provost  
Vice Chancellor, Legal Affairs  
Manager, Administrative Policies and Delegations

ATTACHMENT A  
**Soliciting, Accepting and Returning Gifts**  
**Delegated Authority Matrix**

<b>Gifts Made to The Regents for the UCLA Campus</b>				
				Return gifts* to a Donor
<b>Accept gifts in an amount not to exceed \$ 1,000,000</b>				
<b>Accept gifts in an amount not to exceed \$ 500,000</b>				
<b>Solicit gifts in an amount not to exceed \$1,000,000</b>				
Vice Chancellor, External Affairs	√	√	√	√
Associate Vice Chancellor, External Affairs Development	√	√	√	√
Associate Vice Chancellor, Alumni Relations/Advancement Services	n/a	√	√	√
Assistant Vice Chancellor, Donor Engagement	n/a	√	n/a	n/a
Director, Gift Policy and Agreements	n/a	√	n/a	n/a
Director, Fund Management	n/a	√	n/a	n/a
Directors of Development, as approved by Associate Vice Chancellor, External Affairs Development	√	n/a	n/a	n/a
Deans and other faculty members in conjunction with one of the Officials above with the same delegated authority	√	n/a	n/a	n/a
<b>Gifts Made to The UCLA Foundation</b>				
				Return gifts* to donors
<b>Accept gifts in an amount not to exceed \$ 1,000,000</b>				
<b>Solicit gifts in an amount not to exceed \$1,000,000</b>				
Executive Vice President, The UCLA Foundation (Vice Chancellor, External Affairs)	√	√	√	√
Vice President, Development, The UCLA Foundation (Associate Vice Chancellor, External Affairs Development)	√	√	√	√
Chief Financial Officer, The UCLA Foundation (Associate Vice Chancellor, Alumni Services/Advancement Services)	n/a	√	√	√
Directors of Development, as approved by the Associate Vice Chancellor, External Affairs Development	√	n/a	n/a	n/a
Deans and other faculty members in conjunction with one of the Officials above with the same delegated authority	√	n/a	n/a	n/a

\*See UCLA Delegation of Authority 730.02 regarding the return of gifts to a donor.

## ATTACHMENT B

**Delegation of Authority – To Solicit and Accept Gifts**

UC DA 2011

March 23, 1994

CHANCELLORS

VICE PRESIDENT--AGRICULTURE AND NATURAL RESOURCES

VICE PRESIDENT--UNIVERSITY AND EXTERNAL RELATIONS

Delegation of Authority--To Solicit and Accept Gifts

The authority granted to the President to solicit and accept gifts, under Section 100.4(dd) of the Standing Orders of The Regents, is delegated to you within your respective jurisdictions, up to and including a value of \$5 million, effective immediately, with the exceptions noted below.

In addition, the Vice President--University and External Relations is authorized:

1. to approve solicitation or acceptance of any gift over \$5 million, an authority which shall not be redelegated; and
2. to accept gifts to the University which have not been designated for a specific campus or which have been designated for use by more than one campus or on a Universitywide basis.

Regental authorization is required for solicitation or acceptance of any gift that involves:

1. exceptions to approved University programs or policies [Standing Order 100.4(dd)(1)];
2. obligations on the part of the University to expenditures or costs for which there is no established fund source [Standing Order 100.4(dd)(1)];
3. construction of facilities not previously approved [Standing Order 100.4(dd)(1)];

Regental or Presidential authorization, as appropriate, is required for solicitation or acceptance of any gift that involves an interest in real property [Bylaw 21.3(f)(2)(aa)].

Your authority to act is subject to the following conditions:

1. Whenever there is any ambiguity in the terms of a gift proposal or other question as to its legal effect, the matter shall be referred to the General Counsel and Vice President for Legal Affairs for interpretation and advice. A copy of the proposal and the General Counsel's opinion shall be provided to the Vice President--University and External Relations. If there is any doubt whether gift terms comply with the policies of the University, including those set forth in the Development Policy and Administration Manual, the questions shall be referred to the Vice President--University and External Relations for interpretation and advice prior to acceptance.
2. Gifts to The Regents shall be accepted, administered, documented, and reported in accordance with established University policies, guidelines, and procedures.
3. Gifts to Campus Foundations shall be accepted, administered, documented, and reported in accordance with the September 15, 1989 Policy on Campus Foundations and the October 13, 1989 Administrative Guidelines for Campus Foundations.

4. Gifts to University Support Groups shall be accepted, administered, documented, and reported in accordance with the November 16, 1990 Policy on University Support Groups and the April 24, 1991 Administrative Guidelines for University Support Groups.
5. Gifts to The Regents shall be accepted in the name and become the property of The Regents of the University of California.
6. Gifts of \$1 million and more to The Regents, the Campus Foundations, and the University Support Groups shall be reported quarterly to the President by the Chancellor; this responsibility shall not be redelegated.

For purposes of this delegation the dollar amount of a gift shall be the amount of cash actually received; or, if in the form of a pledge, the full amount pledged; or shall be equivalent to the fair market value of securities or personal property.

Any redelegation of this authority shall be limited to the solicitation or acceptance of gifts which do not exceed \$1 million. Redelegation by the Chancellors and the Vice President-- Agriculture and Natural Resources shall be in writing with copies to the Vice President-- University and External Relations, the Special Assistant--Coordination & Review, and the General Counsel and Vice President for Legal Affairs. Any redelegation by the Vice President--University and External Relations shall be in writing with copies to the Special Assistant--Coordination & Review and the General Counsel and Vice President for Legal Affairs.

This delegation supersedes the March 24, 1986 delegation of authority to Chancellors, the Vice President— Agriculture and Natural Resources, and the Vice President--Budget and University Relations on this same subject (DA 0894).

J. W. Peltason

cc: Members, President's Cabinet

Special Assistant--Coordination & Review

Principal Officers of The Regents