

UNIVERSITY OF CALIFORNIA, LOS ANGELES

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SANTA BARBARA • SANTA CRUZ

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

September 28, 2020

DA 730.03

VICE CHANCELLOR, EXTERNAL AFFAIRS RHEA TURTELTAUB
ASSOCIATE VICE CHANCELLOR, DEVELOPMENT LAURA PARKER
ASSOCIATE VICE CHANCELLOR, EXTERNAL AFFAIRS JULIE SINA
ASSISTANT VICE CHANCELLOR, DONOR ENGAGEMENT AMY CARPENTER
SENIOR EXECUTIVE DIRECTOR, GIFT POLICY WILLIAM KINSELLA
SENIOR DIRECTOR, FUND MANAGEMENT AMANDA KEENE

Delegation of Authority – Soliciting, Accepting and Returning Gifts

- References:
- (a) Regents' Standing Order Section 100.4 (v);
 - (b) UC DA 2631 (To Solicit and Accept Gifts) to Chancellors, et al;
 - (c) UC DA 2579 (Authority to Return Gifts) to Chancellors, et al;
 - (d) UC DA 2589 (To Approve and Conduct Fundraising Campaigns) to Chancellors, et al;
 - (e) UC Administrative Guidelines for Campus Foundations.

Supersedes: UCLA DA 730.02 (Soliciting, Accepting, and Returning Gifts) to Vice Chancellor Turteltaub, et al., dated April 17, 2014.

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 2631.

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


- acceptance of any gift over \$10,000,000 (Presidential approval);
- acceptance of any gift over \$1,000,000 up to \$10,000,000 (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 or Chancellorial approval as appropriate; UC Policy APM-191 and UC DA 2631);
- 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 \$250,000,000 for any purpose (Chancellorial approval; UC DA 2589);
- a fundraising campaign over \$250,000,000 for any purpose (Presidential approval; UC DA 2589);
- 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 cash or personal property, when the purposes of the gift have not 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 2631. The substantive change to the delegation being superseded is increasing the Chancellor's approval amount of the solicitation or acceptance of gifts from \$5MM to \$10MM.

This authority may not be further redelegated.

DocuSigned by:

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Gene Block
Chancellor

Attachments

cc: Executive Vice Chancellor and Provost
Vice Chancellor, Legal Affairs
Director, Administrative Policies and Strategic Initiatives

A T T A C H M E N T A
Soliciting, Accepting and Returning Gifts
Delegated Authority Matrix

Gifts Made to The Regents for the UCLA Campus				
Return gifts** to a Donor				
Accept gifts in an amount not to exceed \$ 1,000,000				
Accept gifts in an amount not to exceed \$ 500,000				
Solicit gifts				
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
Senior Executive Director, Gift Policy	n/a	√	n/a	n/a
Senior 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, faculty, and staff in conjunction with one of the Officials above with the same delegated authority	*	n/a	n/a	n/a
Gifts Made to The UCLA Foundation				
Return gifts** to donors				
Accept gifts in an amount not to exceed \$ 1,000,000				
Solicit gifts				
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, faculty, and staff in conjunction with one of the Officials above with the same delegated authority	*	n/a	n/a	n/a

*Any solicitation of Gifts up to \$1,000,000 should be in conjunction with Development. For solicitation of Gifts over \$1,000,000 coordination with Development is required.

**See UCLA Delegation of Authority 730.03 regarding the return of gifts to a donor.