



University of California, Merced  
5200 N. Lake Road  
Merced, CA 95343

TO: LISA POLLARD CARLSON  
ASSISTANT VICE CHANCELLOR, DEVELOPMENT SERVICES

RE: Delegation of Authority-To Solicit and Accept Gifts

The Regents Standing Order 100.4(dd) delegates general authority to the University President in connection with solicitation and acceptance of gifts. On May 4, 2015, the University President delegated authority to the Chancellor through Presidential Delegation of Authority (DA) 2588. Having oversight for UC Merced Development and Alumni Relations (DAR), the Chancellor subsequently delegated authority to me to accept gifts to the University that do not specifically require approval by the Regents or the President, and do not exceed one million dollars (\$1,000,000). This authority was delegated through UC Merced DA 144 on June 27, 2017.

Effective immediately, as Associate Chancellor and Chief of Staff and pursuant to the authority delegated to me by the Chancellor, I delegate the following authority to you:

- Authority to accept gifts to the University that do not specifically require approval by the Regents or the President, and do not exceed \$250,000.
- For purposes of this delegation, the dollar amount of a gift shall be the amount of cash value actually received, the full amount pledged, or equivalent to the fair market value of securities or personal property.
- You may not re-delegate this authority.
- Source of authority: Presidential DA 2588 and UC Merced DA 144

This is a new delegation.

Sincerely,

E. Edward Klotzbier  
Associate Chancellor and Chief of Staff

cc: Director of Policy and Accountability, Sheryl Ireland



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May 4, 2015

CHANCELLORS  
PROVOST  
EXECUTIVE VICE PRESIDENT–UC HEALTH  
VICE PRESIDENT–AGRICULTURE AND NATURAL RESOURCES  
DIRECTOR, LAWRENCE BERKELEY NATIONAL LABORATORY

DA2588–Delegation of Authority–To Solicit and Accept Gifts

The Regents' Standing Order 100.4(dd) delegates general authority to the University President in connection with solicitation and acceptance of gifts.

At their March 20, 2014 meeting, The Regents approved revisions to Regents' Policy 5201: Policy on Fundraising Campaigns. The authority granted to me pursuant to the revised Policy 5201 to solicit and accept gifts is delegated to you within your respective jurisdictions up to and including a value of \$5 million, with the exceptions noted below. Any donor solicitations, including donor proposals, which require Presidential or Regental approval should clearly state that acceptance is contingent upon such approval.

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

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

Regental, Presidential, or Chief Investment Office authorization, as appropriate, is required for solicitation or acceptance of any gift that involves an interest in real property [Bylaws 21.3(j)(2) and 21.4 (o) and Standing Order 100.4(gg)].

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. If there is any doubt whether gift terms comply with the Policies of the University, including those set forth in the Development Reference Guide, the questions shall be referred to the Assistant Vice President for Institutional Advancement for interpretation and advice prior to acceptance.

Chancellors, et al.

May 4, 2015


Page 2

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, 1995 (last amended September 22, 2005) 5203: Policy on Support Groups, Campus Foundations, and Alumni Associations and the February 12, 2004 Administrative Guidelines for Campus Foundations.
4. Gifts to University Support Groups shall be accepted, administered, documented and reported in accordance with the September 15, 1995 (last amended September 22, 2005) Policy on Support Groups, Campus Foundations, and Alumni Associations and the February 12, 2004 Administrative Guidelines for Support Groups.
5. Gifts to The Regents or to any unit thereof 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.
7. Capital improvement projects included in the gift are subject to approval of the site and design of the projects after completion of the environmental impact review process in accordance with the California Environmental Quality Act.

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

Any redelegation of this authority shall be limited to the acceptance of gifts which do not exceed \$1 million. Redelegation of this authority shall be in writing with copies to the Assistant Vice President–Institutional Advancement and to the General Counsel and Vice President for Legal Affairs.

This delegation is effective immediately and supersedes the March 23, 1994 delegation of authority to Chancellors, the Vice President–Agriculture and Natural Resources, and the Vice President–University and External Relations on this same subject (DA2011).

  
Janet Napolitano  
President

cc: Members, President's Cabinet  
Assistant Vice President O'Neill  
Universitywide Policy Office