CALIFORNIA STATE UNIVERSITY, LONG BEACH
1250 BELLFLOWER BOULEVARD
LONG BEACH, CA 90840-0115
562/ 985-4121

DA-P0073

To: Dan Montoya, Vice President, University Relations & Development
                Kevin Crowe, Associate Vice President, Development
                Nicole Forrest Boggs, Assistant Vice President, UR&D Operations

From: Jane Close Conoley, Ph.D.
                President

Effective Date: September 25, 2023

Supersedes: DA-P0073

Title: Delegation of Gift Acceptance Authority

This memorandum authorizes the Vice President for University Relations and Development, the
Associate Vice President of Development, and the Assistant Vice President for UR&D Operations
the authority to execute, either electronically or manually, transactions and documents associated
with the following gift acceptance activity:

- Evaluation and acceptance of gifts, bequests, and donations of personal property[1]
- Evaluation and acceptance of gifts, bequests, and donations of interests in real property on behalf
  of the Board of Trustees when acceptance has been authorized by a resolution of the Board of
  Trustees or is part of an approved campus master plan (Standing Orders, Chapter III, Section 7-
  b)[2]
- Evaluation, acceptance, and designation of who may use gifts providing a personal benefit to an
  official of the university as required by California Fair Political Practices Commission regulation
  of Gifts to the Agency[3]
- Evaluation and approval of matching gift certifications
- Contemporaneous acknowledgement of gifts for IRS purposes[4]
- Authority to make further gift acceptance delegations
- May further delegate authority to approve matching gifts to the Associate Director of Gift
  Administration by way of written policy

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[1] An individual delegated gift acceptance authority should be a director level or above. An exception can be made for members
of a gift acceptance committee. Any conditions or limitations to the authority should be noted in the narrative section.
[2] This authority may only be delegated by the chancellor or president. Note that this authority relates to gifts of real property to
the state university. Generally, real property should be accepted to an auxiliary where the asset could be sold without
legislative approval.
[3] This authority may only be delegated by the chancellor or president.
[4] Gifts received by an auxiliary must be acknowledged by an official representative of the auxiliary.

All charitable donations with any of the following or similar naming conventions shall be appropriated to the CSULB 49er Foundation:

- CSULB
- LBSU
- California State University, Long Beach
- CSU Long Beach
- Long Beach State
- CSULB Research Foundation
- CSULB Foundation
- Or any of the individual colleges or units within the Long Beach campus of the California State University.
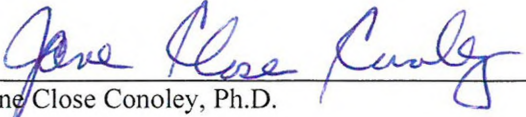
In acting pursuant to this delegation, due diligence must be performed to ensure that all gifts accepted will aid in carrying out the primary functions of the California State University as specified in Education Code sections 89720[5] and 66010.4(b)[6] Further, all gifts, bequests, devises, and donations which are accepted must be used in accordance with restrictions specified by the donor. In the performance of these activities, designees shall adhere to the spirit as well as the letter of all applicable laws and regulations. All advancement programs and activities shall adhere to the Code of Ethics and Standards of Practice set forth by the Council for Advancement and Support of Education, the National Association of College and University Business Officers, and the Association of Fundraising Professionals.

c: Jamarr Johnson, Public Records and Audit

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[5] Education Code section 89720. The trustees may accept on behalf of the state any gift, bequest, devise, or donation of real or personal property whenever the gift and the terms and conditions thereof will aid in carrying out the primary functions of the California State University as specified in Section 66010.4(b). Neither 11005 of the Government Code nor any other law requiring approval by the state officer of gifts, bequests, devises, or donations shall apply to these gifts, bequests, devises, or donations. These gifts, bequests, devises, or donations, and the disposition thereof, shall be annually reported to the California Postsecondary Education Committee, the Joint Legislative Budget Committee, and the Department of Finance by January 5 each year.
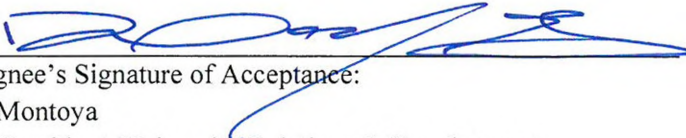
[6] Education Code section 60010.4(b). The California State University shall offer undergraduate and graduate instruction through the master's degree in the liberal arts and sciences and professional education, including teacher education. Presently established two-year programs in agriculture are authorized, but other two-year programs shall be permitted only when mutually agreed upon by the Trustees of the California State University and the Board of Governors of the California Community Colleges. The doctoral degree may be awarded jointly with the University of California, as provided in subdivision (c) and pursuant to Section 66904. The doctoral degree may also be awarded jointly with one or more independent institutions of higher education, provided that the proposed doctoral program is approved by the California Postsecondary Education Commission. Research, scholarship, and creative activity in support of its undergraduate and graduate instructional mission is authorized in the California State University and shall be supported by the state. The primary mission of the California State University is undergraduate and graduate instruction through the master's degree.

By signing this form, I understand that this authorization may be rescinded at any time, without notice, at the discretion of management.

_____   09/25/23
Jane Close Conoley, Ph.D.   Date
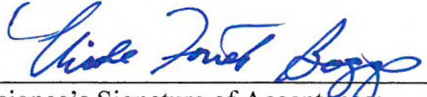President

_____   9/25/23
Designee's Signature of Acceptance: Date
Dan Montoya
Vice President, University Relations & Development

_____   9/25/23
Designee's Signature of Acceptance: Date
Kevin Crowe
Associate Vice President, Development

_____   9/25/23
Designee's Signature of Acceptance: Date
Nicole Forrest Boggs
Assistant Vice President, University Relations & Development
Operations

c: