


Office of the President

Date: March 2, 2017

cc: Cabinet
Darwin Labrado
Jonna J. Lewis
(all w/ attachments)

To: Daniel E. Montplaisir
Vice President, University Advancement

From: 
Dr. Soraya M. Coley
President

Subject: Delegation of Authority – EXECUTIVE ORDER NO. 676
Gift Evaluation and Acceptance to Campuses

Pursuant to Executive Order No. 676, I am delegating to the Vice President of University Advancement, the authority to implement and exercise the provisions of said Executive Order subject to the conditions expressed therein. You may sub-delegate this authority as you see appropriate.

(w/ attachments)

DELEGATION OF GIFT ACCEPTANCE AUTHORITY

The following person is authorized 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 propertyⁱ
- 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)ⁱⁱ
- 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 Agencyⁱⁱⁱ
- Evaluation and approval of matching gift certifications
- Contemporaneous acknowledgement of gifts for IRS purposes^{iv}
- Authority to sign 8283 Forms^v
- Authority to make further gift acceptance delegations

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^{vi} and 66010.4(b)^{vii}. 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.

By signing this form, I understand that this authorization may be rescinded at any time, without notice, at the discretion of management.

Designee's Name (printed): Daniel Montplaisir

Designee's Signature: 

The person named above is designated to act on behalf of the California State University for the gift acceptance authorizations noted above, and is hereby authorized to submit documents associated with such activity. Additional delegation conditions (if any) are noted below, and compliance with these conditions will be subject to monitoring by the approving authority below.

Approving Authority Name (printed): Joraya M. Coley, President

Approving Authority Signature: _____

Date: 8/13/18

ⁱ 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.

ⁱⁱ 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.

ⁱⁱⁱ This authority may only be delegated by the chancellor or president.

^{iv} Gifts received by an auxiliary must be acknowledged by an official representative of the auxiliary.

^v Person must either be an official authorized to sign the tax or information return of the donee or a person specifically authorized to sign the 8283 Form by that official.

^{vi} 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 of each year.

^{vii} Education Code section 66010.4(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.

The California State University
Office of the Chancellor
400 Golden Shore
Long Beach, California 90802-4275

(562) 985-2800

Dated: February 5, 1998

To: Presidents

From: 
Senior Vice Chancellor/Interim Chief of Staff

Subject: Delegation of Gift Evaluation and Acceptance to Campuses—Executive Order No. 676

I am transmitting to you a copy of Executive Order No. 676 which gives campuses greater authority in the acceptance of gifts.

In accordance with policy of The California State University, the campus president has the responsibility for implementing Executive Orders where applicable and for maintaining the campus repository and index for all Executive Orders.

Attachment

Distribution: Chancellor's Office Staff
Campus Vice President for University Advancement
Campus Vice President for Business Administration

The California State University
Office of the Chancellor
400 Golden Shore
Long Beach, California 90802-4275
(562) 985-2800

Executive Order No.: 676

Title: Delegation of Gift Evaluation and Acceptance to Campuses

Effective Date: February 1, 1998

Supersedes: No Prior Executive Order

This Executive Order is issued pursuant to authority granted by Education Code Sections 89035 and 89720, and the Standing Orders of the Board of Trustees, Chapter III, Sections 2 and 4-b and e.

To facilitate and encourage fund raising activities and to give campuses more autonomy in fund raising efforts, the following delegations are approved effective immediately:

- Authority is delegated to campus presidents to evaluate and accept gifts, bequests, and donations of personal property to campuses. Campus presidents may further delegate this authority in whole or in part to campus officers and employees. Henceforth, campuses will evaluate potential campus gifts, bequests, and donations and accept and receipt campus gifts, bequests, and donations in accordance with the requirements of the California Education Code (see below).
- Authority is delegated to campus presidents to accept gifts of interests in real property to campuses 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). Campus presidents may further delegate this authority to campus officers and employees.

In acting pursuant to this delegation, due diligence must be performed to ensure that all gifts accepted by the campus will aid in carrying out the primary functions of the campus and the California State University as specified in Education Code Sections 89720 and 66010.4(b), copies of which are attached to this Executive Order. 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, campuses 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 (CASE), the National Association of College and University Business Officers (NACUBO), and the National Society of Fund Raising Executives (NSFRE).

Dated: February 5, 1998

Executive Order No. 676

In reporting fund raising results (required by Education Code Section 89720), campuses shall use accurate and consistent accounting methods that conform to the appropriate guidelines set forth by the Council for Aid to Education (CAE). Campuses shall submit the CAE report to the Division of University Advancement, Office of the Chancellor, for presentation to the Board of Trustees at its January meeting. This report shall also be sent by the Division of University Advancement to the California Postsecondary Education Commission, the Joint Legislative Budget Committee, and the California Department of Finance.



June M. Cooper
Senior Vice Chancellor/Interim Chief of Staff

Dated: February 5, 1998

Education Code Section 66010.4(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.

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 Section 11005 of the Government Code nor any other law requiring approval by a 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 Commission, the Joint Legislative Budget Committee, and the Department of Finance by January 5 of each year.

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