



Date: 1/14/19

To: Ysabel Trinidad

From: Julia Levi

Department Advancement

RE: Gift to Agency

VICE PRESIDENT FOR BUSINESS & FINANCIAL AFFAIRS COVER MEMO

Please provide additional information regarding the document you are submitting:

Please sign enclosed Gift to Agency.

Once signed, please

Please return to Julia Levi, University Advancement

**Agency Report of:
Ceremonial Role Events and Ticket/Pass Distributions**

A Public Document

1. Agency Name CSU Channel Islands		Date Stamp	California Form 802
Division, Department, or Region <i>(if applicable)</i> University Advancement		For Official Use Only	
Designated Agency Contact <i>(Name, Title)</i> Richard LeRoy		<input type="checkbox"/> Amendment <i>(Must Provide Explanation in Part 3.)</i> Date of Original Filing: _____ <i>(month, day, year)</i>	
Area Code/Phone Number 805-437-1662	E-mail richard.leroy@csuci.edu		

2. Function or Event Information

Does the agency have a ticket policy? Yes No Face Value of Each Ticket/Pass \$ 135.00

Event Description: Go Red For Women Santa Barbara Date(s) 02 / 08 / 19
Provide Title/ Explanation

Ticket(s)/Pass(es) provided by agency? Yes No If no: Jonathan Johnen
Name of Source

Was ticket distribution made at the behest of agency official? Yes No If yes: lpach, Nichole
Official's Name (Last, First)

3. Recipients

• Use Section A to identify the agency's department or unit. • Use Section B to identify an individual. • Use Section C to identify an outside organization.

A. Name of Agency, Department or Unit	Number of Ticket(s)/ Passes	Describe the public purpose made pursuant to the agency's policy
University Advancement	2	Strengthening private support of the CSU
B. Name of Individual <i>(Last, First)</i>	Number of Ticket(s)/ Passes	Identify one of the following:
		Ceremonial Role <input type="checkbox"/> Other <input type="checkbox"/> Income <input type="checkbox"/> <i>If checking "Ceremonial Role" or "Other" describe below:</i>
		Ceremonial Role <input type="checkbox"/> Other <input type="checkbox"/> Income <input type="checkbox"/> <i>If checking "Ceremonial Role" or "Other" describe below:</i>
C. Name of Outside Organization <i>(Include address and description)</i>	Number of Ticket(s)/ Passes	Describe the public purpose made pursuant to the agency's policy

4. Verification

I have read and understand FPPC Regulations 18944.1 and 18942. I have verified that the distribution set forth above, is in accordance with the requirements.

 Signature of Agency Head or Designee	<u>Flaine Crandall</u> Print Name	<u>AVP, DBFH</u> Title	<u>1/25/19</u> <i>(month, day, year)</i>
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Comment: _____

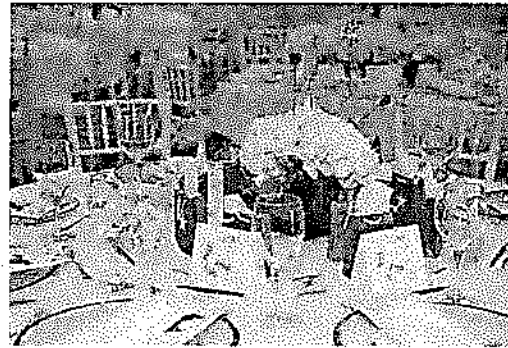


American
Heart
Association.

American Heart Association.



Share



Event Program

Date: Friday, February 8, 2019

Location: Hilton Santa Barbara Beachfront Resort (formerly the Doubletree)

10:30am: Registration

10:30am-Noon: Health Expo & Networking

12:00pm: Lunch & Program - There will be an ask for donations during the Open Your Heart portion of the luncheon program. Our goal is 100% participation.

1:30pm: Adjourn

Remember to WEAR RED

Volunteer

(<https://ahasantabarbara.ejoinme.org/MyEvents/20182019SantaBarbaraGoRedLuncheon/Leadership/Volunteer/tabid/957180/Default.aspx>)

Levi, Julia

From: Robinson, Grace
Sent: Tuesday, January 08, 2019 4:11 PM
To: LeRoy, Richard; Levi, Julia
Subject: Fwd: Following up?

Follow Up Flag: Follow up
Flag Status: Flagged

Hi guys,
Can you help me get started on this tomorrow? Thank you!!
Warmly,
Grace

Sent from my iPhone

Begin forwarded message:

From: "Chairez, Nikki" <nikki.chairez@csuci.edu>
Date: January 8, 2019 at 3:53:49 PM PST
To: "Robinson, Grace" <grace.robinson@csuci.edu>
Subject: RE: Following up?

Hi Grace,

This would need to follow the gift to agency process. I believe forwarding the original email from Johnathan Johnen to Ritchie and Julia will get the ball rolling. Julia works with BFA to report the gifts. Given his email, it seems that the language is general and outlines his intention to gift the tickets to the University. However, if they assess the email and ask for it to be more direct, they may guide you to ask Johnathan for another email with specific verbiage.

Thank you,

Nikki Chairez '06
Executive Assistant to the Vice President for University Advancement
One University Drive
Camarillo, CA 93012

805-437-3525
www.csuci.edu

-----Original Message-----

From: Robinson, Grace
Sent: Tuesday, January 08, 2019 3:33 PM
To: Chairez, Nikki <nikki.chairez@csuci.edu>
Subject: FW: Following up?

Hi Nikki!

One of our PGAC members offered us these tickets last year. It looks like each seat is worth \$125 and we are invited to use two seats at this event.

I was wondering ... do you know if this type of gift needs to go through that special process for accepting expensive tickets? I reached out to Nichole/Ritchie in December, but it was probably too late in the year, I didn't hear back.

I can ask them too, but if you know please tell me :)

Happy new year thanks Nikki!!

Warmly,
Grace

Grace Robinson, Esq.
Director of Planned and Major Gifts

California State University Channel Islands One University Drive / Camarillo, CA 93012
Office: 805-437-3615 / Mobile: 805-437-2715

-----Original Message-----

From: Robinson, Grace

Sent: Friday, December 21, 2018 10:40 AM

To: LeRoy, Richard <richard.leroy@csuci.edu>; Ipach, Nichole <nichole.ipach@csuci.edu>; DeHart, Carrick <carrick.dehart@csuci.edu>; Gomez, Eva <eva.gomez@csuci.edu>

Subject: FW: Following up?

Hi friends,

Our PGAC member Jonathan Johnen has sponsored a table at the Santa Barbara Go Red Event on February 8 in Santa Barbara. He has invited us to send one or two people to join him.

I am happy to go, but I wanted to offer this up to all of you and or the President's Office if that's more strategic.

Also, I wanted to check about whether this needs to run through the gifts of tickets -

Grace Robinson, Esq.
Director of Planned and Major Gifts

California State University Channel Islands One University Drive / Camarillo, CA 93012
Office: 805-437-3615 / Mobile: 805-437-2715

-----Original Message-----

From: Jonathan P. Johnen [<mailto:jjohnen@fjinsure.com>]

Sent: Thursday, December 13, 2018 11:14 AM

To: Robinson, Grace <grace.robinson@csuci.edu>

Subject: RE: Following up?

No problem at all. I was going to mention an event that will be happening in February - please see attached. I've sponsored a table and was wondering if you think anyone from CSUCI would be interested in attending as my guest. There is no cost, and I thought the University may be interested in the possible exposure. I'm told it's a well-attended event, and it's for a great cause. Please call to discuss at your convenience - 805.644.3500.

Thanks and great to see you this morning, Jonathan

-----Original Message-----

From: Robinson, Grace <grace.robinson@csuci.edu>

Sent: Thursday, December 13, 2018 9:06 AM

To: Jonathan P. Johnen <jjohnen@fjinsure.com>

Subject: Following up?

Sorry to lose our conversation there .. is there anything we should follow up about? Let me know if I can help with leaps and turns!

Sent from my iPhone