

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

A Public Document

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

2. Function or Event Information

Does the agency have a ticket policy? Yes No Face Value of Each Ticket/Pass \$ 200.00

Event Description: UCSB Economic Summit Date(s) 05 / 24 / 23

Provide Title/ Explanation

Ticket(s)/Pass(es) provided by agency? Yes No If no: U.S. Bank

Name of Source

Was ticket distribution made at the behest of agency official? Yes No If yes: LeRoy, Richard

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	3	Strengthening alumni and private support for the CSU.
B. Name of Individual (Last, First)	Number of Ticket(s)/ Passes	Identify one of the following:
		Ceremonial Role <input type="checkbox"/> Other <input type="checkbox"/> Income <input type="checkbox"/> <small>If checking "Ceremonial Role" or "Other" describe below:</small>
		Ceremonial Role <input type="checkbox"/> Other <input type="checkbox"/> Income <input type="checkbox"/> <small>If checking "Ceremonial Role" or "Other" describe below:</small>
C. Name of Outside Organization (include address and description)	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.

	Barbara Rex	AVP Budget & Planning/Interim	05/22/2023
<small>Signature of Agency Head or Designee</small>	<small>Print Name</small>	<small>Title</small>	<small>(month, day, year)</small>

Comment: _____

This form is for use by all state and local government agencies. The form identifies persons that receive admission tickets and passes and describes the public purpose for the distribution. This form was prepared by the Fair Political Practices Commission (FPPC) and is available at www.fppc.ca.gov.

General Information

FPPC Regulation 18944.1 sets out the circumstances under which an agency's distribution of tickets to entertainment events, sporting events, and like occasions would not result in a gift to individuals that attend the function. In general, the agency must adopt a policy which identifies the public purpose served in distributing the admissions. The Form 802 serves to detail each event and the public purpose of each ticket distribution. FPPC Regulation 18942 lists exceptions to reportable gifts, including ceremonial events, when listed on this form.

When the regulation procedures are followed, persons, organizations, or agencies who receive admissions are listed on a Form 802. Agency officials do not report the admissions on the official's Statement of Economic Interests, Form 700, and the value of the admission is not subject to the gift limit.

The Form 802 also informs the public as to whether the admissions were made at the behest of an agency official and whether the behested tickets were provided to an organization or to specific individuals.

Exception

FPPC This form is not required for admission provided to a school or university district official, coach, athletic director, or employee to attend an amateur event performed by students of that school or university.

Reporting and Public Posting

Ticket Distribution Policies: An agency must post its ticket policy on its website within 30 days of adoption or amendment and e-mail a link of the website location to FPPC at form802@fppc.ca.gov.

Form 802: The use of the ticket or pass under the policy must be reported on Form 802 and posted on the agency's website within 45 days of distribution. A link to the website location of the forms must be e-mailed to FPPC at form802@fppc.ca.gov.

The FPPC will post on its website the link to each agency's policy and completed forms. It is not necessary to send an e-mail each time a new Form 802 is posted. It is only necessary to submit the link if the posting location changes.

This form must be maintained as a public document.

Privacy Information Notice

Information requested by the FPPC is used to administer and enforce the Political Reform Act. Failure to provide information may be a violation subject to administrative, criminal, or civil penalties. All reports are public records available for inspection and reproduction. Direct questions to FPPC's General Counsel.

Instructions

Part 1. Agency Identification:

List the agency's name. Provide a designated agency contact person, their phone number, and e-mail address. Mark the amendment box if changing any information on a previously filed form and include the date of the original filing.

Part 2. Function or Event Information:

Confirm that your agency has a policy for ticket distribution. Unless the ceremonial role or income box in Part 3, Section B, is marked, this form is only applicable if your agency has a policy.

Complete all of the other required fields that identify the ticket value, description of event, date(s) and whether the ticket was provided by the agency or an outside source. If an agency official behests the tickets, the official's name is also required. Use the comment field or an attachment to explain in full.

Part 3. Ticket Recipients:

This part identifies who uses the tickets. The identification requirements vary depending upon who received the tickets and are categorized into three sections. Each section must list the number of tickets received. Use the comment field or an attachment to explain in full.

Section A. Report tickets distributed to agency staff, other than an elected official or governing board member, pursuant to the agency's policy. It is not necessary to list each employee's name, but identify the unit/department for which the employee works. The agency must describe the public purpose associated with the ticket distribution. A reference to the policy is permissible.

Section B. Report: 1) any agency official who performs a ceremonial role; 2) any agency official who reports the value as income; or 3) tickets used by elected officials and governing board members (including those distributed pursuant to the agency's policy).

Section C. Report tickets provided to an organization. The organization's name, an address (website url is permissible), and a brief description of the public purpose are required.

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

Agency Name

CSU Channel Islands

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
B. Name of Individual (Last, First)	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>
		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 (include address and description)	Number of Ticket(s)/ Passes	Describe the public purpose made pursuant to the agency's policy

Bruno, Amber

From: LeRoy, Richard
Sent: Monday, May 22, 2023 3:03 PM
To: Bruno, Amber
Subject: FW: Invitation from Vince Caballero | UCSB Economic Summit May 24th

Hi Amber

FYI. We are only accepting three tickets to this event.

Thanks for tracking this Gift to Agency.

Ritchie

Richard LeRoy
Vice President for University Advancement
805-437-1662 (office) | 805-305-1103 (cell)
richard.leroy@csuci.edu

From: Debbie Jimenez <Deborah.Jimenez@unionbank.com>
Sent: Monday, May 22, 2023 12:16 PM
To: LeRoy, Richard <richard.leroy@csuci.edu>
Cc: Schneider, Helene <helene.schneider@csuci.edu>; Vincent Caballero <Vincent.Caballero@unionbank.com>
Subject: RE: Invitation from Vince Caballero | UCSB Economic Summit May 24th

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Hi Ritchie,

We're happy to hear you, Aura and Miguel can attend the UCSB Summit. We will miss you, Helene!

Please check in at the U.S. Bank table upon arrival to receive your wristbands for entry into the event.

Feel free to reach out with any questions.

Thank you!

Debbie Jimenez
Executive Assistant to
Vince Caballero, Region Manager
Santa Barbara County Region
and
Alfred Ovasapyan, Region Manager
Mountain Valley Region

T: 805-899-8412
24 E. Carrillo St.

Santa Barbara, CA 93101
deborah.jimenez@unionbank.com



From: LeRoy, Richard <richard.leroy@csuci.edu>
Sent: Friday, May 19, 2023 10:13 PM
To: Debbie Jimenez <Deborah.Jimenez@unionbank.com>
Cc: Schneider, Helene <helene.schneider@csuci.edu>; Vincent Caballero <Vincent.Caballero@unionbank.com>
Subject: [External] Invitation from Vince Caballero | UCSB Economic Summit May 24th

***** External email: Please be careful when opening attachments or clicking links. *****

Hi Deborah,

Thank you so much to you and Vincent for the invitation to CSU Channel Islands to the UCSB Economic Summit next Wednesday. We are grateful to accept your offer of four tickets. Unfortunately, Helene Schneider will not be in town to join us.

Our attendee names are:

1. Aura Bryan, Director of Corporate & Foundation Relations
2. Miguel Delgado Helleseeter, Associate Professor of Economics and Director, Institute for Global Economic Research (IGER)
3. Richard LeRoy, Vice President for University Advancement

Please let me know if you need any additional information.

Thank you,
Ritchie

Richard LeRoy
Vice President for University Advancement
805-437-1662 (office) | 805-305-1103 (cell)
richard.leroy@csuci.edu

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Camarillo, CA 93012
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reply and then delete the message. Any use of this email inconsistent with those terms is strictly prohibited. Additionally, for information on cybersecurity and Corporate & Investment Banking, please click [here](#).

Bruno, Amber

From: LeRoy, Richard
Sent: Friday, May 19, 2023 10:57 AM
To: Bruno, Amber; Van Arsdell Morrison, Hayley
Cc: Schneider, Helene; Bryan, Aura
Subject: FW: Invitation from Vince Caballero | UCSB Economic Summit May 24th
Attachments: EFP 2023 Economic Summit Invitation.pdf

Follow Up Flag: Follow up
Flag Status: Flagged

Hi Amber and Hayley,

We were offered tickets to this event. Thanks Helene.

I am planning to go with Aura, Miguel Delgado Hellester, and someone from EU (Jill, Daniel or Jaimie).

@Bruno, Amber – can you please process this as a Gift to Agency?

@Van Arsdell Morrison, Hayley – can you add this to my calendar and invite Aura and Miguel? I realize that we will have to move some of my other meetings around.

Thanks,
Ritchie

Richard LeRoy
Vice President for University Advancement
805-437-1662 (office) | 805-305-1103 (cell)
richard.leroy@csuci.edu

From: Schneider, Helene <helene.schneider@csuci.edu>
Sent: Tuesday, May 16, 2023 8:43 PM
To: LeRoy, Richard <richard.leroy@csuci.edu>
Subject: Fwd: Invitation from Vince Caballero | UCSB Economic Summit May 24th

Ritchie-

I'm in Orange County next week and cannot attend. This is a good networking event - President Beck and Nichole would attend each year. I think you, President Yao and perhaps Susan Andrzejewski and then Aura perhaps should attend? See below for details.

Helene Schneider
Regional Director of Development
CSU Channel Islands

Begin forwarded message:

From: Vincent Caballero <Vincent.Caballero@unionbank.com>
Date: May 16, 2023 at 6:31:14 PM PDT
To: "Schneider, Helene" <helene.schneider@csuci.edu>
Subject: Invitation from Vince Caballero | UCSB Economic Summit May 24th

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Hi Helene,

U.S. Bank, formerly Union Bank is a sponsor of the upcoming UCSB Economic Summit taking place on Wednesday, May 24th at the Granada Theater. This year's summit will feature Christopher Waller – Governor, Federal Reserve Board of Governors.

As sponsors of this event, we would like to gift 4 event tickets to you and your colleagues. An invitation with event details is attached.

Please submit your attendee names to Deborah.jimenez@unionbank.com **by Friday, May 19th**. Attendees may check in and receive their ticket/wristband on the day of the event at the U.S. Bank table which will be located in front of the theater.

I hope to see you there!

Thank you,

Vince Caballero
Managing Director
Region Manager
Consumer Banking
Santa Barbara County Region
Union Bank, N.A.
O: 805-560-1647
M: 213-219-2490
vincent.caballero@unionbank.com

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UC SANTA BARBARA
Economic Forecast Project

Tickets \$200

Includes continental breakfast and
digital access to Economic Outlook Publication.

Available at artsandlectures.ucsb.edu or
call the A&L box office at 805.893.3535

Breakfast: 8:00 - 9:00 AM

Program: 9:00 - 11:30 AM

2023 SOUTH COUNTY
ECONOMIC SUMMIT

MAY 24, 2023

The Granada Theatre
1214 State St
Santa Barbara, CA 93101



Christopher Waller

Governor
Federal Reserve Board of Governors

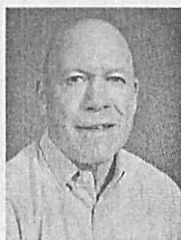
Fed's Perspective on the Economy



Ted Egan

Chief Economist
City and County of San Francisco

Is San Francisco in a Downward
Spiral? A Cautionary Tale for
California Cities.



Peter Rupert

Director
Economic Forecast Project

Economic Update

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KEYNOTE



SPECIAL THANKS TO



For event information, call 805.893.5148 or email kennethfreeland@ucsb.edu.