

## Delegations of Authority for The University of Texas Southwestern Medical Center\*

<b>Board of Regents' Rules and Regulations</b>		<b>From</b>	<b>Delegate</b>	<b>Date of Delegation</b>
<b>CURRENT PURPOSE GIFTS:</b> Delegation of authority to accept current purpose gifts, other than securities, to UTSMC with President's concurrence, provided that each gift is processed in accordance with all applicable laws, Rules, policies and the UT Gift Acceptance Procedures.	<i>Rule 60101, Section 5; UT Gift Acceptance Procedures, Article 2, Section 6</i>	Daniel K. Podolsky, M.D. President	Amanda Billings, Vice President for Development	November 25, 2019
<b>GIFTS:</b> Delegation of authority to accept certain gifts (other than gifts of real property or outdoor works of art) to The University of Texas Southwestern Medical Center at Dallas made in cash or in kind in the amount of \$1,000,000 or less.	<i>Part Two, Chapter 1, Subsection 1.3; Rule 60101, Section 3</i>	Daniel K. Podolsky, M.D. President	Assistant Director of Gift Records	January 1, 2006 (cont. September 1, 2008)
<b>GIFTS OF SECURITIES:</b> Delegation of authority to accept current purpose gifts of securities to The University of Texas Southwestern Medical Center provided that each gift is processed in accordance with all applicable laws, Rules, policies and the UT Gift Acceptance Procedures.	<i>Rule 60101, Section 5; UT System Gift Acceptance Procedures Section 7</i>	Daniel K. Podolsky, M.D. President	<b><u>The University of Texas System Office of External Relations, Communications and Advancement Services</u></b> Randa S. Safady, Ph.D., Vice Chancellor of External Relations, Communications and Advancement Services  Andria Brannon, Associate Vice Chancellor for Advancement Services	February 1, 2021
<b>IRS FORMS RELATING TO GIFTS:</b> Delegation of authority to execute certain IRS forms including without limitation IRS Forms 8282 and 8283. Relates to gifts accepted on behalf of the University of Texas Southwestern Medical Center at Dallas.	<i>Rule 60101, Section 8</i>	Daniel K. Podolsky, M.D. President	Amanda Billings, Vice President for Development	November 25, 2019

*\*Please be aware that this chart provides only a brief summary of each delegation memorandum. You will need to review the specific delegation memorandum that is of interest to you for detailed scope and restrictions related to such delegation. As of 3-25-2020, with the exception of certain Special Procedure Contracts, the Board approval threshold for UT Southwestern Medical Center is \$5,000,000, and the OGC threshold is \$5,000,000 (see Rule 10501 and UTS145). Current as of 9/28/2023.*

<b>Board of Regents' Rules and Regulations</b>		<b>From</b>	<b>Delegate</b>	<b>Date of Delegation</b>
<b>IRS FORMS RELATING TO GIFTS:</b> Delegation of authority to execute certain IRS forms including without limitation IRS Forms 8282 and 8283. Relates to gifts accepted on behalf of the University of Texas Southwestern Medical Center at Dallas.	<i>Rule 60101, Section 2 and 6</i>	Daniel K. Podolsky, M.D. President	Assistant Director of Gift Records	June 15, 2005 (cont. September 1, 2008)
<b>BANKING:</b> Delegation of authority to execute and deliver contracts for banking services.	<i>Rule 10501; UTS166; UTS167</i>	Daniel K. Podolsky, M.D. President	Michael Serber, Vice President for Finance	November 25, 2019 (eff. December 1, 2019)
<b>NEW MAJOR CONSTRUCTION AND REPAIR AND REHABILITATION CONSTRUCTION PROJECTS:</b> Delegation of authority to take the following contractual actions related to construction of Major Projects as defined by Regents' Rule 80301: (1) appoint architects and engineers; approve plans and construction documents; (2) execute and deliver contracts and agreements with construction contractors, architects, engineers, and related professional service providers; and (3) approve the construction contractor's or construction manager's estimates, guaranteed maximum price or stipulated sum proposals, and other documents.  Any agreements exceeding \$20,000,000 will require President's concurrence.	<i>Rule 80404; Rule 80301; Rule 10501</i>	Daniel K. Podolsky, M.D. President	Holly Crawford, Executive Vice President for Business Affairs	February 1, 2022

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<b>Board of Regents' Rules and Regulations</b>		<b>From</b>	<b>Delegate</b>	<b>Date of Delegation</b>
<b>NEW MAJOR CONSTRUCTION AND REPAIR AND REHABILITATION CONSTRUCTION PROJECTS:</b> <b>Delegation of authority to take the following contractual actions related to construction of Major Projects as defined by Regents' Rule 80301, for contracts up to an amount not to exceed \$5,000,000:</b> <b>(1) appoint architects and engineers; approve plans and construction documents;</b> <b>(2) execute and deliver contracts and agreements with construction contractors, architects, engineers, and related professional service providers; and</b> <b>(3) approve the construction contractor's or construction manager's estimates, guaranteed maximum price or stipulated sum proposals, and other documents.</b>	<i>Rule 80404; Rule 80301; Rule 10501</i>	Daniel K. Podolsky, M.D. President	<u><b>Not to Exceed \$5,000,000</b></u> Michael Serber, Vice President for Finance and Institutional CFO	February 1, 2022
<b>NEW MINOR CONSTRUCTION PROJECTS AND MINOR REPAIR AND REHABILITATION CONSTRUCTION PROJECTS:</b> <b>Delegation of authority to (1) appoint architects; approve plans and construction documents; and execute and deliver related contracts, agreements, guaranteed maximum price or stipulated sum proposals, and other documents; and (2) execute and deliver contracts and agreements with architects, engineers, and other professional service providers, for all new minor construction projects and minor repair and rehabilitation projects with an anticipated value under \$10,000,000.</b>	<i>Rule 80403</i>	Daniel K. Podolsky, M.D. President	Holly Crawford, Executive Vice President for Business Affairs	February 1, 2022

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<b>Board of Regents' Rules and Regulations</b>		<b>From</b>	<b>Delegate</b>	<b>Date of Delegation</b>
<b>NEW MINOR CONSTRUCTION PROJECTS AND MINOR REPAIR AND REHABILITATION CONSTRUCTION PROJECTS:</b> Delegation of authority to (1) appoint architects; approve plans and construction documents; and execute and deliver related contracts, agreements, guaranteed maximum price or stipulated sum proposals, and other documents; and (2) execute and deliver contracts and agreements with architects, engineers, and other professional service providers, for all new minor construction projects and minor repair and rehabilitation projects with an anticipated value under \$5,000,000.	<i>Rule 80403</i>	Daniel K. Podolsky, M.D. President	<u><b>Anticipated Value Under \$5,000,000</b></u> Michael Serber, Vice President for Finance and Institutional CFO	February 1, 2022
<b>NEW MINOR CONSTRUCTION PROJECTS AND MINOR REPAIR AND REHABILITATION CONSTRUCTION PROJECTS:</b> Delegation of authority to (1) appoint architects; approve plans and construction documents; and execute and deliver related contracts, agreements, guaranteed maximum price or stipulated sum proposals, and other documents; and (2) execute and deliver contracts and agreements with architects, engineers, and other professional service providers, for all new minor construction projects and minor repair and rehabilitation projects with an anticipated value under \$1,000,000.	<i>Rule 80403</i>	Daniel K. Podolsky, M.D. President	<u><b>Anticipated Value Under \$1,000,000</b></u> Charles Cobb, MBA, Associate Vice President for Supply Chain Management	November 25, 2019 (eff. December 1, 2019)
<b>SPACE LEASE:</b> Delegation of authority relating to execute and deliver space lease agreements for the purpose of leasing space for use by the institution for institutional purposes.  Any space lease agreements exceeding \$20,000,000 will require concurrence with President.	<i>Rule 10501</i>	Daniel K. Podolsky, M.D. President	Holly Crawford, Executive Vice President for Business Affairs	February 1, 2022

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<b>Board of Regents' Rules and Regulations</b>		<b>From</b>	<b>Delegate</b>	<b>Date of Delegation</b>
<b>SPACE LEASE:</b> Delegation of authority relating to execute and deliver space lease agreements up to an amount not to exceed \$5,000,000, for the purpose of leasing space for use by the institution for institutional purposes.  Any space lease agreements exceeding \$5,000,000 will require concurrence with President.	<i>Rule 10501</i>	Daniel K. Podolsky, M.D. President	<u><b>Not to Exceed \$5,000,000</b></u> Michael Serber, Vice President for Finance and Institutional CFO	February 1, 2022
<b>SPACE LEASE – STUDENT HOUSING:</b> Delegation of authority to execute and deliver space lease agreements, for the purpose of leasing space for use by the institution for student housing.  Any space lease agreements exceeding \$5,000,000 will require concurrence with President.	<i>Rule 10501</i>	Daniel K. Podolsky, M.D. President	Matthew Fulghum, Director, Real Estate Services	September 1, 2023
<b>PURCHASE ORDERS:</b> Delegation of authority to execute and deliver purchase orders for routine purchases of equipment, supplies, goods, and services.	<i>Rule 10501</i>	Daniel K. Podolsky, M.D. President	<u><b>Purchases up to \$100,000</b></u> Kelly Gonzalez, Assistant Vice President for Library Services	September 25, 2015
<b>PURCHASE ORDERS – PURCHASING OFFICE:</b> Delegation of authority to execute and deliver purchase orders for routine purchases of equipment, supplies, goods, and services.	<i>Rule 10501</i>	Daniel K. Podolsky, M.D. President	<u><b>Purchases up to \$15,000</b></u> Procurement Assistant, Purchasing Office	April 18, 2016
<b>PURCHASE ORDERS – ANIMAL RESOURCES CENTER:</b> Delegation of authority to execute and deliver purchase orders for routine purchase of equipment, supplies, goods, and services solely for the Animal Resources Center.	<i>Rule 10501</i>	Daniel K. Podolsky, M.D. President	<u><b>Not to Exceed \$15,000</b></u> Procurement Assistant, Animal Resources Center	November 25, 2019 (eff. December 1, 2019)
<b>PURCHASE ORDERS - LIBRARY PURCHASES:</b> Delegation of authority to execute and deliver purchase orders for routine purchases of equipment, supplies, goods, and services.	<i>Rule 10501, Section 5</i>	Daniel K. Podolsky, M.D. President	<u><b>Purchases up to \$50,000</b></u> Mori Lou Higa, Library Services	June 15, 2005 (cont. September 1, 2008)

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<b>Board of Regents' Rules and Regulations</b>		<b>From</b>	<b>Delegate</b>	<b>Date of Delegation</b>
<b>CONTRACTS AND/OR PURCHASE ORDERS:</b> Delegation of authority to execute and deliver contracts of any kind or nature, including contracts for the purchase of equipment, supplies, goods, and services.  Any contracts exceeding \$20,000,000 will require President's concurrence.	<i>Rule 10501</i>	Daniel K. Podolsky, M.D. President	Holly Crawford, Executive Vice President for Business Affairs	February 1, 2022
<b>CONTRACTS AND/OR PURCHASE ORDERS:</b> Delegation of authority to execute and deliver contracts of any kind or nature, including contracts for the purchase of equipment, supplies, goods, and services not to exceed \$5,000,000.	<i>Rule 10501</i>	Daniel K. Podolsky, M.D. President	<u><b>Not to Exceed \$5,000,000</b></u> Michael Serber, Vice President for Finance and Institutional CFO	February 1, 2022
<b>CONTRACTS AND PURCHASE ORDERS:</b> Delegation of authority to execute and deliver procurement contracts of any kind or nature, including contracts and/or purchase orders for the purchase of equipment, supplies, goods, and services.	<i>Rule 10501</i>	Daniel K. Podolsky, M.D. President	<u><b>Not to Exceed \$1,000,000</b></u> Charles Cobb, MBA, Associate Vice President, Supply Chain Management	November 25, 2019 (eff. December 1, 2019)
<b>CONTRACTS AND PURCHASE ORDERS:</b> Delegation of authority to execute and deliver procurement contracts of any kind or nature, including contracts and/or purchase orders for the purchase of equipment, supplies, goods, and services.	<i>Rule 10501</i>	Daniel K. Podolsky, M.D. President	<u><b>Not to Exceed \$500,000</b></u> Sourcing, Contracting and Purchasing Directors in Supply Chain Management	November 25, 2019
<b>CONTRACTS AND PURCHASE ORDERS:</b> Delegation of authority to execute and deliver procurement contracts and purchase orders for the routine purchase of equipment, supplies, goods, and services.	<i>Rule 10501</i>	Daniel K. Podolsky, M.D. President	<u><b>Not to Exceed \$100,000</b></u> Each Purchasing Specialist in Purchasing	October 6, 2020
<b>CONTRACTS AND PURCHASE ORDERS:</b> Delegation of authority to execute and deliver procurement contracts and purchase orders for the routine purchase of equipment, supplies, goods, and services.	<i>Rule 10501</i>	Daniel K. Podolsky, M.D. President	<u><b>Not to Exceed \$100,000</b></u> Each Sr. Buyer in Purchasing	November 25, 2019 (eff. December 1, 2019)

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<b>CONTRACTS AND PURCHASE ORDERS:</b> Delegation of authority to execute and deliver procurement contracts of any kind or nature, including contracts and/or purchase orders for the purchase of equipment, supplies, goods, and services.	<i>Rule 10501</i>	Daniel K. Podolsky, M.D. President	<u><b>Not to Exceed \$50,000</b></u> All Buyers in Supply Chain Management	December 1, 2019
<b>CONTRACTS – REVENUE GENERATING AND NO COST CONTRACTS:</b> Delegation of authority to execute and deliver revenue generating contracts of any kind or nature, up to a value not to exceed \$500,000, and no cost contracts.	<i>Rule 10501</i>	Daniel K. Podolsky, M.D. President	<u><b>Value Not to Exceed \$500,000</b></u> William Ward, Sr. Manager, Legal Contract Service	September 1, 2023
<b>CONTRACTS – LEASE OF STUDENT HOUSING:</b> Delegation of authority to execute and deliver contracts for student housing.	<i>Rule 10501, Section 5</i>	Daniel K. Podolsky, M.D. President	Michael Serber, Assistant Vice President, Office of Financial Planning	February 1, 2008 (cont. September 1, 2008)
<b>AFFILIATION AGREEMENTS, PROGRAM AGREEMENTS, GRADUATE MEDICAL EDUCATION AGREEMENTS, AND LETTER AGREEMENTS FOR EDUCATIONAL EXPERIENCE:</b> Delegation of authority to execute and deliver affiliation agreements and program agreements.	<i>Rule 10501</i>	Daniel K. Podolsky, M.D. President	W. P. Andrew Lee, M.D., Executive Vice President for Academic Affairs and Provost	August 1, 2021
<b>AFFILIATION AGREEMENTS, PROGRAM AGREEMENTS, GRADUATE MEDICAL EDUCATION AGREEMENTS, AND LETTER AGREEMENTS FOR EDUCATIONAL EXPERIENCE:</b> Delegation of authority to execute and deliver affiliation agreements AND program agreements.	<i>Rule 10501</i>	Daniel K. Podolsky, M.D. President	Charles M. Ginsburg, M.D., Vice Provost and Sr. Associate Dean, Southwestern Medical School	November 25, 2019 (eff. December 1, 2019)
<b>PAYOR CONTRACTS AND MEDICARE/MEDICAID CERTIFICATIONS:</b> Delegation of authority to execute and deliver payor contracts and Medicare/Medicaid Certifications.	<i>Rule 10501</i>	Daniel K. Podolsky, M.D. President	Mark Meyer, Health System CFO	February 28, 2023 (eff. March 1, 2023)
<b>MEDICARE/MEDICAID CERTIFICATIONS:</b> Delegation of authority to execute and deliver Medicare/Medicaid Certifications.	<i>Rule 10501</i>	Daniel K. Podolsky, M.D. President	Mack Mitchell, M.D., Interim Executive Vice President for Health System Affairs	September 6, 2017

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<b>Board of Regents' Rules and Regulations</b>		<b>From</b>	<b>Delegate</b>	<b>Date of Delegation</b>
<b>SPONSORED RESEARCH; RESEARCH CONTRACTS &amp; CONSORTIUM AGREEMENTS; CONFIDENTIAL DISCLOSURE AGREEMENTS; CLINICAL TRIAL AGREEMENTS:</b> Delegation of authority to execute and deliver state, federal and other contracts or proposals for sponsored research, research contracts & consortium agreements, confidential disclosure agreements and clinical trials contracts on behalf of the Board.  Any agreements exceeding \$20,000,000 will require President's concurrence.	<i>Rule 10501</i>	Daniel K. Podolsky, M.D. President	Holly Crawford, Executive Vice President for Business Affairs	February 1, 2022
<b>SPONSORED RESEARCH; RESEARCH CONTRACTS &amp; CONSORTIUM AGREEMENTS; CONFIDENTIAL DISCLOSURE AGREEMENTS; CLINICAL TRIAL AGREEMENTS:</b> Delegation of authority to execute and deliver state, federal and other contracts or proposals for sponsored research, research contracts & consortium agreements, confidential disclosure agreements and clinical trials contracts up to an amount not to exceed \$5,000,000, on behalf of the Board.	<i>Rule 10501</i>	Daniel K. Podolsky, M.D. President	<u><b>Not to Exceed \$5,000,000</b></u> Michael Serber, Vice President for Finance and Institutional CFO	February 1, 2022
<b>SPONSORED RESEARCH:</b> Delegation of authority to execute and deliver state, federal and other contracts or proposals for sponsored research.	<i>Rule 10501</i>	Daniel K. Podolsky, M.D. President	Cheryl Anderson, Director, Pre/Post Award Administration	April 18, 2016
<b>SPONSORED RESEARCH:</b> Delegation of authority to execute and deliver state, federal and other proposals for sponsored research (with no limit on value) and state, federal and other contracts for sponsored research not to exceed \$500,000.	<i>Rule 10501</i>	Daniel K. Podolsky, M.D. President	<u><b>Proposals – No Limit on Value Contracts – Up to \$500,000</b></u> Director/Assistant Director, Sponsored Programs Administration	November 25, 2019 (eff. December 1, 2019)

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<b>Board of Regents' Rules and Regulations</b>		<b>From</b>	<b>Delegate</b>	<b>Date of Delegation</b>
<b>INTELLECTUAL PROPERTY:</b> Delegation of authority to execute and deliver agreements granting an interest in intellectual property up to a total value not to exceed \$1 million. Includes typical option and license agreements and research contracts with corporate sponsors, as well as non-disclosure agreements and material transfer agreements.	<i>Rule 10501; Rule 90101</i>	Daniel K. Podolsky, M.D. President	<b><u>Total Value Not to Exceed \$1,000,000</u></b> Denise Canales, Assistant VP for Technology Commercialization	November 1, 2020
<b>INTELLECTUAL PROPERTY:</b> Delegation of authority to execute and deliver agreements granting an interest in intellectual property. Includes typical option and license agreements and research contracts with corporate sponsors, as well as non-disclosure agreements and material transfer agreements.	<i>Rule 10501; Rule 90101</i>	Daniel K. Podolsky, M.D. President	Dr. Marc Nivet, Executive Vice President for Institutional Advancement	May 7, 2019
<b>CONTINUING EDUCATION LETTER AGREEMENTS:</b> Delegation of authority to execute and deliver Continuing Education Related Letter Agreements.	<i>Rule 10501</i>	Daniel K. Podolsky, M.D. President	Cameron Slocum, Vice President and Chief Operating Officer, Academic Affairs	September 21, 2023
<b>HR EMPLOYEE AGREEMENTS AND FORMS:</b> Delegation of authority to execute and deliver HR Employee Agreements and Forms.	<i>Rule 10501</i>	Daniel K. Podolsky, M.D. President	Jeremy Falke, VP & Chief HR Officer	September 1, 2023
<b>HR EMPLOYEE AGREEMENTS AND FORMS:</b> Delegation of authority to execute and deliver HR Employee Agreements and Forms.	<i>Rule 10501</i>	Daniel K. Podolsky, M.D. President	Janelle Browne, VP and Chief Human Resources Officer	November 25, 2019 (eff. December 1, 2019)
<b>IMMIGRATION DOCUMENTS:</b> Delegation of authority to execute and deliver immigration documents.	<i>Rule 10501</i>	Daniel K. Podolsky, M.D. President	Mario Sanchez, Director, Office of International Affairs	November 25, 2019 (eff. December 1, 2019)

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Board of Regents’ <u>Rules and Regulations</u>	From	Delegate	Date of Delegation
DELEGATIONS OF AUTHORITY FROM THE UNIVERSITY OF TEXAS SYSTEM ADMINISTRATION TO THE UNIVERSITY OF TEXAS SOUTHWESTERN MEDICAL CENTER			
<b>HOLIDAY SCHEDULE:</b> Delegation of authority to approve annually the holiday schedule for the respective institutions.	<i>Rule 30201, Section 1</i>	Jonathan Pruitt, Executive Vice Chancellor for Business Affairs	Presidents, The University of Texas                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      <

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<b>Board of Regents' Rules and Regulations</b>		<b>From</b>	<b>Delegate</b>	<b>Date of Delegation</b>
<b>TRADEMARK LICENSE AGREEMENTS:</b> Delegation of authority to execute and deliver trademark license agreements related to Board-owned trademarks, so long as all trademark license agreements include: (1) the grant clause <a href="#">posted online</a> or a grant clause substantially similar to that grant clause, (2) a statement making the license subject to the Trademark License Agreement Terms and Conditions <a href="#">posted online</a> , and (3) a Trademark Schedule showing the exact mark or marks being licensed and indicating how those marks are to appear (including color, capitalization, typesetting, and any other distinguishing features of the included marks). Ensure proper monitoring of each licensee. All trademarks with a value exceeding institutions' local contracting authority must be reviewed and processed as outlined in UTS125.	<i>Rule 10501; Rule 90101, Sects. 15.1 and 15.3; UTS125</i>	Daniel H. Sharphorn, Vice-Chancellor and General Counsel	Presidents – UT Institutions  Chief Business Officers – UT Institutions and UT System  Vice Provosts for Research and Vice Presidents for Research – UT Institutions  Chief Legal Officers – UT Institutions	March 6, 2017
<b>SETTLEMENT OF DISPUTES (UT INSTITUTIONS EXCEPT M.D. ANDERSON):</b> Delegation of authority to execute and deliver agreements settling certain claims, disputes, or litigation in the amount of \$20,000 or less that impact only your UT institution and no other UT institutions.	<i>Rule 10501</i>	Daniel H. Sharphorn, Vice-Chancellor and General Counsel	Chief Legal Officers – UT Institutions	September 21, 2016
<b>INVOICES AND PAYMENTS FOR OUTSIDE COUNSEL SERVICES:</b> Delegation of authority to submit to the Texas Attorney General the outside counsel invoices required by SB 1370 (86R-2019).	<i>SB 1370 (86R); Rule 10501, Sects. 2.1 and 2.8</i>	Daniel H. Sharphorn, Vice-Chancellor and General Counsel	Chief Legal Officers – UT Institutions	July 30, 2019 (eff. September 1, 2019)

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