WHO IS CAL POLY FOUNDATION?

• Cal Poly Foundation (CPF) is a non-profit organization established in 2006
• The purpose of CPF is to support the educational mission of the University
• CPF is a private, nonprofit corporation, led by Cal Poly Staff, Alumni and friends. CPF was incorporated to generate private support that will play a crucial role in building and maintaining Cal Poly’s multidisciplinary Learn by Doing educational model
• In addition to providing leadership to raise private support for the university, the Foundation Board also manages the University’s $189 million endowment and other private gifts.
**WHAT DOES CPF DO?**

CPF Oversees the following types of gifts that come onto campus for specific purposes:

<table>
<thead>
<tr>
<th>Endowments</th>
<th>Charitable Trusts</th>
<th>Bequest Gifts</th>
<th>Campus Programs</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Discretionary, Restricted Gifts, Unrestricted Funds</td>
</tr>
</tbody>
</table>
WHAT DOES CPF DO? (CONTINUED)

• If a donor wants to establish either a Life Income Gift (Trust or Bequest) or an endowment you will want to work with your College Advancement Office. The Foundation contacts for these type of accounts are Lisa Rockwell-Harpster and Brian Walker. They are responsible for the creation of the gift agreements and opening the appropriate accounts.

• If a donor wishes to give current use money, either discretionary to the Department/College or restricted for a specific purpose you will want to work with Lisa and Brian on the gift agreement and Debbie Tuson to setup a new account. Therese Souza oversees the scholarship gifts.
What Does CPF Do? (Continued)

For easy reference when trying to determine if an account is managed by CPF:

- Restricted Gift funds accounts range from 60000-69999
- Discretionary Funds accounts range from 70000-79999
- Life Income Funds and Endowments range from 00000-09999
WHERE CAN YOU FIND CAL POLY FOUNDATION?

• You can find CPF information at www.calpolyfoundation.org for a complete view of the CPF and its activities
• CPF forms and procedures can be found at the home page for Cal Poly Foundation and include:
  o General information for Finance and Business office contacts
  o Travel forms and guidelines
  o Finance forms and guidelines
  o HR and Payroll forms and guidelines
  o Campus Programs information
Debbie Tuson- Campus Programs Analyst
dtuson@calpoly.edu
805-756-6116