As many of you may have already heard from your Deans or Department Heads, effective November 1, 2014, the University (state) will begin providing administrative services for the Cal Poly Foundation; these services are currently provided by the Cal Poly Corporation. Administrative services include all purchases and expenditures, as well as employee hires (including student assistants).

Over the past several months, University Advancement and Administration and Finance staff have been working closely together to convert Cal Poly Foundation (CPF) data to PeopleSoft, establish new business processes and create training for this transition. The Cal Poly Foundation will now be able to utilize all the tools and resources of the University, such as the Cal Poly Data Warehouse, Pro Card, Office Max, and contract and procurement services.

In addition to the University providing all of the administrative services for the Cal Poly Foundation, a key component of this conversion is that Campus Programs operations (donor funds) will be integrated into PeopleSoft and will now operate as University funds. Campus Programs funds will now be managed along with all other funding sources within the University, thereby providing the convenience of using one set of business processes and forms, and supporting transparency of campus resources.

One of the major changes to be noted with the Campus Programs operating as University funds is that the approval process for expenditures from Campus Programs will be the same as it is for all other University expenditures. Your Deans and Department Heads have been made aware of this change and understand that the person approving a transaction will be required to hold the appropriate level of authority in order for the purchase or payment to be processed. In further support of that requirement, we will soon be
delivering new Delegation of Authority tools that will allow users to more easily confirm the personnel who have been delegated authority to approve expenditures from the various Campus Programs funds. This is a business practice that supports oversight responsibility for expenditures of funds.

To assist end-users who may not be familiar with University transaction processing, we have scheduled open forums in University Union Conference Room 220 on the following dates/times:

October 20th – 9:00 - 11:00 a.m.
November 4th – 2:30 - 4:30 p.m.
November 5th – 2:30 - 4:30 p.m.

The open forums will provide an overview of many of the most common types of University transaction processes, and Administration and Finance and University Advancement staff will be available to answer any questions you may have about the transition. To register, click here. For more information, visit the ABC website or call Dawn Rudder at 6-5871. We are aware there will be changes to your current business processes; for assistance with any specific questions you may have, please contact Brett Holman at 6-7417.

We look forward to this collaboration with the Cal Poly Foundation as we strive to provide more efficient services and budget transparency for the University as a whole.

Karen Webb
Interim Vice President
Administration and Finance