A MESSAGE FROM ASSISTANT DEAN MARY KELTING

My favorite part of my job is meeting our alumni, hearing about their careers, and learning what role Cal Poly has played in their lives. Every story is different, but I often notice a few common threads.

The biggest link that connects our Orfalea network is a Learn by Doing attitude. More often than not, alumni can trace their professional ambitions back to the real-world experiences they had as students.

Today, the college aims to enhance career readiness among all students through our core initiatives supporting international opportunities, Accounting Area growth, the Center for Innovation and Entrepreneurship’s programs, our new Packaging Value Chain Center and our Business Building renovation.

More than ever, your support is essential in making vital programs accessible to each of our 3,000 students. Our unique brand of experiential business education wouldn’t be possible without the support of alumni, industry partners, parents and friends like you.

As you turn these pages, I hope you see the role your generosity has played in the success of our college and the lives of our students. The story we’ve written together thus far has been remarkable, and we’re far from finished.

Mary Kelting
Assistant Dean for Advancement and External Relations

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Charlie King, Cal Poly alumnus and King Asset Management partner, was photographed at the university by Chris Leschinsky.

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Explore the Giving Edition Online
cob.calpoly.edu/givingedition
PACKAGING CENTER’S DIRECTOR BRINGS NEW VISION

Packaging industry veteran Brent Moore has joined the Orfalea College of Business as the administrative director of the new Packaging Value Chain Center. Moore has more than 20 years of experience in lean supply chain, packaging engineering and marketing in a variety of packaging verticals. He will lead fundraising efforts for the center while building relationships that provide industry-relevant research opportunities and problem-solving projects to students and faculty.

His first objective: find the right space to combine the center’s offices, classrooms and Learn by Doing labs as curriculum expands to incorporate customer research, prototyping, operational feasibility and testing. The program recently launched its first professional certificate programs. The M.S. in Packaging Value Chain will also debut in fall 2018. All certificate and master’s programs are offered 100-percent online.

“We are very excited to help change the world of packaging by infusing our comprehensive approach with our Learn by Doing philosophy,” said Moore regarding the center, the first of its kind to be housed in a business school.

The program is looking for strong industry partners across packaging disciplines. If you’re interested in connecting with the Packaging Value Chain Center, reach out to Moore at bmoore24@calpoly.edu.

Orfalea Launches Career Readiness Initiative

The Orfalea College of Business has set a goal to ensure each student feels career ready by graduation. “Career readiness means students can confidently choose a career path, navigate the hiring process, and leverage unique experiences to compete for quality jobs before graduation,” said Amy Carter, assistant dean for student success. The donor-supported initiative will bring new programs to students, including a sequence of mentoring programs tailored for each step in the college journey. Students will have access to upperclassmen, young alumni and executive mentors who can help them choose a concentration, sharpen industry-relevant skills and network with professionals as they approach graduation. Mentoring opportunities will also empower student leaders and recent graduates to build soft skills needed to develop relationships and communicate effectively. Use the envelope enclosed to support the Career Readiness Initiative or give online at bit.ly/supportcalpoly.

Lisa Hufford Named Orfalea’s 2017 Honored Alumna

CEO and author Lisa Hufford (Business Administration, ’93) was named the 2017 Orfalea College of Business Honored Alumna. Hufford built her career in tech sales at RR Donnelley, Modus Media International and Microsoft. In 2006, she founded Simplicity Consulting, a Seattle-based firm supporting a thriving network of hundreds of marketing professionals.

In her latest book, Navigating the Talent Shift, Hufford outlines the movement around building on-demand marketing teams as an alternative to traditional staffing or agency models for corporations. She is an advocate for experienced and savvy marketing professionals — especially women — in search of choice, impact and success in their work.

Hufford is a longtime supporter of the Orfalea College of Business, the Women in Business club and Cal Poly’s Center for Innovation and Entrepreneurship (CIE). She joined the CIE Founder’s Circle in 2014, providing financial support to student programs and giving her time to mentor young entrepreneurs. She also serves as a member of the college’s Dean’s Advisory Council.

For a full list of Orfalea College of Business Honored Alumni, visit bit.ly/honoredalumni.
Donors Rally Around the Campaign for 200

Donors step up to support the Accounting Area’s growth.

Cal Poly’s accounting alumni and industry partners made a major statement in recent years: they’re behind the area’s efforts to grow.

The area’s Campaign for 200 aims to expand the undergraduate and master’s programs to graduate 200 quality, CPA-eligible students per year — nearly double its current rate. The effort is a response to increased demand from global and regional accounting firms that depend on a steady stream of talent from the Orfalea College of Business.

Alumni, corporate partners and friends of the program have rallied around this effort with record-setting enthusiasm. From 2014 to 2017, donations to the Accounting Area nearly doubled to more than $375,000, the highest one-year fundraising total in the program’s history. In that time, the number of gifts to the area increased by 50 percent. A critical part of the total money raised included gift matches from employers — the most matching funds of any program in the college during the fiscal year.

According to Sheri Boscaro, executive director of Accounting Excellence, the area has made major progress on a smart-growth plan that engages more students without diluting hands-on programs or limiting faculty-student interaction. The funds have been put to use immediately to help attract and retain the best faculty possible to teach in the undergraduate, M.S. Tax and M.S. Accounting programs.

“The program depends upon our faculty,” said Boscaro. “We are lucky to have talented industry professionals as lecturers to inspire students to pursue an accounting career. Then we rely on our esteemed tenured and tenure-track faculty to delve into the technical skills and leadership instincts students need to be career ready.”

Students are already feeling the impact with the new options to double-concentrate in accounting or earn an accounting minor, attracting students from different majors to take upper division accounting courses and possibly attain a CPA license. In addition, signature Learn by Doing programs like the Volunteer Income Tax Assistance Program (VITA) have resources to include more students.

Outside the classroom, the program has introduced industry-sponsored Excel trainings to ensure students are ready to contribute on the first day of their internships. The Cal Poly Accounting Club (CPAC) has also bolstered career-readiness resources — résumé workshops, recruiter panels and networking sessions — for its member base of nearly 400 students.

To lend your support to the Campaign for 200, visit bit.ly/supportcalpoly.
In their own words, members of the Orfalea College of Business community share what philanthropy means to them.

THE IMPACT OF GIVING

Joan: “The Richard and Julie Hood Professorship in Marketing reminds me of how important it is that I make Learn by Doing projects available to my students. The students become so involved and invested in the industry and government projects. It is really amazing to see! The experience makes them truly career ready — ready to go to work on day one of their future jobs. This distinguishes Cal Poly students from others, and I am so glad I am able to make a contribution to this dynamic process.”

Brennan: “The Hood Award has been one of the top ways a donor has impacted our marketing students over the long term. It gives me time to develop new courses in marketing, which is rapidly changing in the digital age. And the award criteria challenge me to think consistently about ways to create significant real-world experiences for our marketing students. I believe it helps the college attract and retain the best professors in marketing, for the benefit of our students. We are grateful to Richard and Julie Hood for investing Cal Poly.”

— Marketing Professors Joan Lindsey-Mullikin and Brennan Davis, recipients of the 2017 Richard and Julie Hood Professorships in Marketing
“Earning this scholarship is a big step toward achieving greater heights in my future career in finance. I love knowing that alumni and donors support students financially. As a first-generation college student, that support gives my family and me a sense of comfort and hope. This scholarship will alleviate some financial burden and help me concentrate on my studies while I prep for the CFA exam.”

— Melisa Zarate, finance senior and recipient of a John Maher Scholarship, which supports upper-division students in the Colleges of Agriculture, Food and Environmental Sciences, Liberal Arts and Business

“The Orfalea International Business Tour to Ireland was my first experience being on a plane and being outside of California. It opened up my mind to consider both culture and business on a global scale. Between navigating the streets of new cities and networking with professionals during our company visits, I feel more empowered to branch out from my comfort zone. I am beyond thankful for this trip, the experiences it gave me, and the grant that made it all possible.”

— Brooke Lowe, business administration junior and Orfalea Travel Grant recipient in Kinsale, Ireland

“When Professor Tad Miller became my mentor, I was inspired to be the best version of myself — the way Tad saw me. As I reflect back, I attribute where I am today largely to that first fork in the road when I walked into the Cal Poly Accounting Club, took a risk at running for the board, and was inspired by a professor who dedicated himself to others. When I heard Tad was celebrating 30 years of teaching, it was a no-brainer to start a scholarship in his honor. Tad is the epitome of an outstanding professor and advisor; his legacy should live on in the college’s history as one of the greatest.”

— James Huang (Business Administration, ’08) founder of the Tad Miller Scholarship

To support the Tad Miller Scholarship, visit bit.ly/tadmiller.
“It is one thing to learn about the capabilities of a machine in the classroom, but being able to actually program and operate equipment like a water jet cutting table is a priceless experience for all industrial technology students.”

— Cade Vallejo, industrial technology and packaging senior in the Metals Fabrication Lab, which has added new equipment thanks to donor support

“The CIE has helped me fearlessly chase my dreams. They’ve helped me get back up on my feet after getting knocked down from tough challenges. And most importantly, they’ve celebrated my successes and encouraged me to aim even higher. The CIE and their network of mentors and donors provide the foundation for student entrepreneurs like me to give it our very best and build amazing businesses.”

— Matt Maxwell, finance senior and founder of BoltAbout, a startup in the SLO HotHouse that leases electric bicycles
Alumnus and commercial real estate developer Charlie King leads Orfalea’s effort to renovate the Business Building and transform the student experience.
Economics alumnus Charlie King knows more than most about the power of the right building. He has spent nearly 30 years working in Bay Area real estate development during a time when many growing businesses have reshaped the employee experience around technology and collaboration. Today, he leads King Asset Management alongside his brother Michael, a fellow Cal Poly economics alumnus and former commercial banker. Charlie’s clients in tech, retail and industrial sectors look to the firm to create environments that foster a strong company culture in Palo Alto and the San Francisco Peninsula.

“The right space sends the simple message to a team that there’s nothing more important than attracting and keeping those employees,” said King. “The better the employee feels about the company they work for, the happier and more productive they are.”

While at Cal Poly in the 1980s, King admits he didn’t get that message from the classrooms. He and his classmates sat in the historic Business Administration Building, known to many as the Clocktower Building or, more recently, the Cotchett Education Building. The structure is one of Cal Poly’s oldest, built in 1942. As King recalls, his classrooms were old and hot, with a bit of character woven into its Spanish-style architecture.

“The facilities were nothing different than what you had in grade school or high school,” he said. “Back then things were so bare bones that you couldn’t Learn by Doing until you got out of the classroom.”

King graduated five years before the existing Business Building was completed in 1992. The project created 45,000 square feet of new office space and classrooms, including tiered classrooms modeled after Harvard’s case study rooms of the 1980s. The new building served as an essential upgrade, but over the years it has not evolved with shifts in technology, instructional design or a student population that has grown by more than 30 percent.

Now, 25 years later, King sees an opportunity to bring features of the modern workplaces he helps craft to Cal Poly’s Business Building. Renovations could alleviate crowded hallways and add flexible study spaces. Orfalea’s core clubs could stay in the building for their events in rooms large enough for their thriving member base, rather than migrating to the library or University Union. Students could easily work in teams in modern classrooms built for interactive Learn by Doing projects. Faculty could move back into the building from portable offices they’re now using across campus.

“The bones of the building are great, but the floor plan is not functional,” King said. “There is so much wasted space that, if better utilized, could be converted into meeting areas, conference space and lounges. We have the opportunity to showcase the college and all it has to offer within the walls of this building.”

King sees another potential challenge: from the outside, the building is quite possibly one of the most beautiful on campus. The four-story structure rises from the lush grass of O’Neill Green with stately pillars, a massive breezeway and its signature Spanish style. Its exterior grandeur masks many of its internal challenges, including lack of space for growing numbers of students and faculty.

On any given weekday, the learning community fractures after classes conclude as individuals scatter across campus looking for meeting rooms, food and collaborative study space. King says the exodus means students lose the ability to build relationships with classmates and faculty outside the classroom — skills that will be essential for career-ready graduates in the modern workplace.

“I wouldn’t have made the investment in this campaign unless I thought Dean Scott Dawson and the leadership team were in place to make it a reality.”

— Charlie King (Economics, ’87), partner at King Asset Management
Business with a cornerstone gift to the Building Renovation Campaign. The effort — broken down into project phases — will take a strategic approach to the building’s first major interior improvements meant to positively impact each of the college’s 3,000 students.

“We have the opportunity to create a real work environment within the college that mirrors what graduates will see in major businesses. That’s the direction all of these business schools are going today,” said King.

Phase I: The South Tower
At the start of another fall quarter, Dean Scott Dawson feels excited about the prospect of new construction. After consulting with students, faculty, donors and Cal Poly Facilities, he suggested that renovations begin with the construction of a new three-story tower near the south end of the existing building to add 7,000 square feet of space.

On the first floor, students will have access to a 128-seat, flexible classroom sorely needed for large club meetings and student events. The flat design, technology outfit and movable furniture will also accommodate evolving instructional design that puts the focus on teams of students learning together rather than on a lecturer.

The tower’s second and third floors will house the college’s academic area offices where students can easily find faculty and staff. Moving these high-traffic offices off of the Business Building’s fourth floor will free up space for student study lounges and faculty offices.

The new South Tower will include a green roof that will also provide a serene meeting place where students and faculty can enjoy the campus’ natural beauty and views.
of Spanos Stadium. When finished, the project has the potential to bring a new sense of community to the college, enabling students and faculty to spend their days at the building while taking advantage of Orfalea’s full spectrum of collaborative resources.

With a Phase 1 fundraising goal of $5 million, Dean Dawson and King are rallying support from the alumni community and corporate partners to realize the vision of the South Tower. Construction could begin as early as 2019. “World class students deserve educational spaces that will maximize their learning and their ability to become future business leaders,” Dawson said. “We need more alumni to share Charlie’s passion for making the renovation and addition a reality in the near future.”

The improvements won’t stop with the new tower. According to Dean Dawson, subsequent phases will transform areas like the Breezeway, enclosing the space to create a multi-use classroom and interview rooms for employers. The college also has plans to renovate the courtyard to provide more interactive and study space to foster a more connected environment among students and faculty.

King believes the transformation will have a tangible effect on attracting new students, retaining top faculty and establishing the college as one of the best undergraduate business schools in the nation. At the conclusion of the project, he envisions the Business Building serving as an active hub for the campus community.

“I think it’s so important that every student, every parent, every professor and every prospective Mustang who walks through that building see improvement on a regular basis,” King said. “Change is not only exciting, but it also demonstrates to all that we are always trying to get better.”

THIS IS YOUR OPPORTUNITY to leave a mark on Cal Poly’s campus by supporting the Orfalea College of Business Building Renovation Campaign.

Make a donation today via the envelope enclosed or at bit.ly/supportcalpoly.

Looking to make a bigger impact? Reach out to Assistant Dean Mary Kelting at mkelting@calpoly.edu to discuss ways you or your company can support the campaign.
By the Numbers:
A look at philanthropy in the Orfalea College of Business.

The Orfalea College of Business has a vision to become the undisputed leader in experiential business education. Thousands of individuals, companies and foundations give back to the college each year, adding up to a vibrant community of support that makes our vision a reality. Gifts made throughout the year allow the college and its academic areas to provide timely support for Learn by Doing projects and extracurricular programs, while endowments generate lasting income for the college’s key programs. Together, these funds ensure a sustainable future for the Orfalea College of Business as it prepares career-ready graduates. Totals were recorded at the conclusion of Fiscal Year 2016-17 on June 30, 2017.

$3,969,316
Gifts and commitments raised in FY 2017

1,416
Number of gifts and pledges in FY 2017

+75%
Percent of gifts were between $1 and $5,000

New Gift Sources of Support in FY 2017
- 49.8% Alumni and Individuals
- 38.2% Corporate, Corporate Matching, Corporate Foundations
- 12% Personal, Private Foundation and Other Organizations

Types of Gifts During FY 2017
- New Gifts $1,401,776
- New Pledges $702,690
- Testamentary $1,864,850

$154,705
Corporate gift matching in FY 2017

Total Gifts and Commitments to the Orfalea College of Business
- FY 2017 $3,969,316
- FY 2016 $2,324,951
- FY 2015 $2,545,919
- FY 2014 $1,953,360
- FY 2013 $2,088,289

84
Number of college endowments

$26,440,145
Total amount of the college’s endowments

$1,473,673
Endowment payouts during FY 2017
A LASTING LEGACY

Lori DeMatteis and fellow alumni leave their marks on the college through planned giving.

Alumna Lori DeMatteis’ relationship with Cal Poly cuts a distinct silhouette on the horizon of the university’s alumni network. Her family’s connection to the university is bound to last for more than a century. The roots of her relationship run deep while the branches of her legacy extend tall, continuing to grow.

The story begins with a family connection long before DeMatteis was born. Her great uncles rode to campus on horseback from the Central Valley during the early 20th century when the young institution was a hub for the state’s agricultural community. Cal Poly remained an important source of expertise and inspiration in her family at home in California’s rural Frazier Valley near Porterville.

When she arrived at Cal Poly in the 1980s to earn a business degree, DeMatteis saw a different side of campus. She took her first steps into higher education thanks to a community scholarship. Her success in national business simulation competitions and management club leadership positions inspired her to pursue a career in the booming tech sector that would take her around the globe. After beginning her career at AT&T, she rose to the top of global brands such as General Electric, Oracle and Emerson Network Power (now Vertiv). As an advisor for the Budapest-based Pozi Technologies, DeMatteis now commands board rooms and leads the movement toward artificial intelligence and the Internet of Things.

In between world travels, the Orfalea College of Business Dean’s Advisory Council gave DeMatteis an opportunity to stay connected as a loyal donor and passionate advocate for new academic programs, career resources and, most importantly, underrepresented students from her hometown.

Continued on next page
“There is so much poverty in the lower part of the Central Valley, it is the difference between night and day compared to the metro centers of the state,” said DeMatteis, pointing to the lack of jobs and clean water in the region. “It is important to me that deserving students from this region have a chance to attend Cal Poly and to be able to dream of something bigger — to look at the sky and know that there are no limits to what they can achieve.”

DeMatteis turned her passion into action by planning a future gift to the Orfalea College of Business through a bequest in her will. Her generosity will provide academic scholarships to outstanding students from her community of Porterville. DeMatteis hopes the funding removes financial barriers for young professionals looking to expand their own perspectives and career opportunities.

DeMatteis joins a new wave of donors opting for planned gifts. Planned giving includes a variety of philanthropic options involving wills, trusts, beneficiary of a retirement or life insurance policy and annuities that will benefit Cal Poly students after a donor’s lifetime. The Orfalea College of Business has seen a swell of alumni of all ages establishing planned gifts to ensure their generosity empowers more students who will soon fill its classrooms. Since fiscal year 2015, Orfalea’s donors have documented an average of $1.2 million in planned gifts per year.

“I have always felt that it was important to leave a legacy — to give to the future,” DeMatteis said of her motivation for planning a bequest. “Giving to the Orfalea College of Business accomplishes this for me. It offers something lasting that will be part of generations to come.”

DeMatteis thrives in a different world than she envisioned as a student — a distant vision compared to the world her great uncles saw cresting the hills of San Luis Obispo. But her gift has ensured the future can still be rooted in the familiar values of home. Though she will never meet her scholarship recipients, DeMatteis knows they’ll feel the transformative power of a Learn by Doing education.

“My hope is that my gift enables the school to continue to evolve and grow so that there can be many more stories handed down through generations of students and families at Cal Poly.”

Explore Your Planned Giving Options

Making a future gift to the Orfalea College of Business is easier than you might think. Most planned gifts involve naming Cal Poly as a beneficiary in a will or trust. Donors can leave their entire estate to Cal Poly or leave a certain dollar amount or percentage to the university. Even 1 percent of a donor’s estate makes a big impact on students. Bequests can be restricted to a project or program of your choice, like Lori DeMatteis’ scholarship. Orfalea’s development team has sample bequest language that will ensure your intentions are met. Donors are free to alter their plans during their lifetime.

Your family can also leave a legacy at Cal Poly through a variety of assets:

- Designate mutual funds or appreciated securities
- Donate a distribution from a retirement account
- Donate real estate you have owned for more than one year

To learn more about planned giving at Cal Poly, contact Allie Burnett, senior director of gift planning, at 805-756-2925 or alburnet@calpoly.edu.
Looking for a way to make an impact in the Orfalea College of Business this year? Supporting the Dean’s Excellence Fund will fuel critical career-readiness resources that put Cal Poly graduates ahead of the curve when applying for jobs. Your gift will have the potential to impact each of our 3,000 students through mentoring programs, international travel, academic support and networking events with seasoned alumni.

Gifts of all sizes have the potential to provide essential funding for student programs:

- **$100**: Can provide career-readiness supplies to one student-led club in the Orfalea College of Business

- **$250**: Can sponsor a skill development workshop for Orfalea’s Multicultural Business Program students

- **$500**: Can send five students on an exclusive industry tour with major employers and alumni in Los Angeles or the Bay Area

- **$1,000**: Can provide a travel grant to a student on one of the five Orfalea International Business Tours planned for the next year

- **$5,000**: Can support a career readiness peer advisor for one year as they help hundreds of fellow students polish their résumés and hone interview responses

Please consider making a gift to the Dean’s Excellence Fund via the envelope enclosed or online at bit.ly/supportcalpoly.

**Reach Out**
Connect with Cal Poly’s development officers to explore how you can empower our tradition of Learn by Doing

- **Mary Kelting**
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Save the Date!

Alumni Beer and Wine Garden
April 14, 2018, at Cal Poly

Make plans to meet up with your Orfalea College of Business classmates and faculty in 2018. Sip local wine and beer while enjoying delicious appetizers with your fellow Mustangs from all generations. You’ll also have the chance to explore campus during Open House festivities. Tickets will be available in early 2018.

STAY CONNECTED TO CAL POLY
To continue receiving this magazine, college e-newsletters and event invitations, make sure we have your current contact information by visiting bit.ly/cpcontactinfo.