Take a look at what you’ve done. The scholarships. The annual gifts. The Learn by Doing brought to life.

When it adds up, supporters like you have empowered thousands of Orfalea College of Business students to sharpen their skills in the classroom and succeed in the business world. Dozens of seasoned alumni have also come back to share their expertise with students and faculty, driving our programs to evolve in step with industry. This virtuous loop has recently culminated with U.S. News & World Report ranking the college among the best business schools in the nation.

In this publication, we aim to tell your stories: the stories of how passion becomes generosity, generosity becomes opportunity, and opportunity becomes the success of our students. As we celebrate the spirit of our supporters, we turn our attention toward the exciting future of our college and the steps it will take to get there. Consider this your invitation to come with us as we begin the next chapter of the Orfalea College of Business.
RUSS NASH NAMED ORFALEA COLLEGE OF BUSINESS HONORED ALUMNUS

Russ Nash (B.S., Business Administration, 1982) has been named the 2015 Orfalea College of Business Honored Alumnus. After graduating Cal Poly, Nash soon realized his passion for entrepreneurship, starting everything from a financial planning firm to a smoothie shop. Today he and his brother, fellow Cal Poly alumnus Steven (B.S., Business Administration, 1985), own and operate Professional Education Services, a company that offers innovative continuing education programs in the accounting and real estate industries.

Along the way, Nash has continued to make a big impact on campus by supporting Cal Poly’s Center for Innovation & Entrepreneurship (CIE). From the program’s early days, he has taken a hands-on role in mentoring student teams as they develop their ventures, several of which have launched successful businesses.

“Being around these fired-up, business-minded young people is really inspiring,” says Nash of his work with student startups in the CIE. “I have walked in their shoes, so I’m happy to spread the knowledge to those who can learn from it now.”

In addition to mentorship, Nash has provided critical financial support to the CIE’s student-centered programs. Cal Poly recently debuted the Nash Family Entrepreneurship Lab, the university’s on-campus incubator and workspace for startups. Today the Nash family also supports a student scholarship in the Accounting area of the Orfalea College of Business.

NEXT STEP Check out a Q&A with Nash about what keeps him connected to Cal Poly 30 years after graduating at bit.ly/OrfaleaHonoredAlumni.

PROVOST AWARD

Professor Jonathan York Honored with Provost’s Award for Philanthropy

Entrepreneurship Professor Jonathan York was honored with the Provost’s Award for Philanthropic Leadership during Cal Poly’s annual Fall Conference event. The award recognized York’s leadership of the Center for Innovation & Entrepreneurship, which he co-founded with Professor Lou Tournatzky in 2010.

York has been instrumental in not only growing a host of student-centered programs on and off campus, but also in building external support for the CIE among alumni, industry partners, and friends in its Founders’ Circle.

His vision and hard work have helped the center raise more than $1.5 million and secure critical support and connections that will help ensure a sustainable future for its programs.

York was honored at Cal Poly’s annual Fall Conference event by Provost Kathleen Enz Finken and President Jeffrey D. Armstrong.
The Orfalea Effect

As you walk through the Business Building breezeway, you’ll see a plaque that commemorates a day that will go down in Cal Poly history: April 20, 2001. The inscription reads, “We hope that the Orfalea College of Business will always encourage leadership and educational inspiration, and that all who walk through these halls realize their true worth and purpose in life.”

It’s been 15 years since the day Paul and Natalie Orfalea changed Cal Poly’s business education for good through a landmark $15 million donation that named the Orfalea College of Business and set its course to become a leading business school.

Since 2001, the endowment’s impact has been nothing short of transformative, supporting everything from classroom technology and lab equipment to new faculty positions and research grants. But the Orfalea Foundation’s generosity has made the biggest impact on programs that shape the student experience and fuel Learn by Doing on campus and beyond.

The transformation enabled Orfalea Student Services to grow to provide new resources like peer mentoring and tutoring programs, which took hold using the college’s innovative peer-advising model. These programs have doubled retention rates for at-risk students and helped the Orfalea College of Business maintain the highest graduation rate at Cal Poly. The college has also established Orfalea Travel Grants that enable 200 students to study abroad and experience the global economy firsthand each year. Today, more business students study internationally than any other major at Cal Poly.

“A bias for action has always been central to the Orfaleas’ business and philanthropic ethos, making a partnership with Cal Poly and its Learn by Doing philosophy a natural fit,” according to Orfalea Foundation Vice President Catherine Brozowski.

Along with Cal Poly’s Learn by Doing philosophy, the generosity of the Orfalea Foundation has changed the lives of thousands of graduates. In no uncertain terms, the gift has helped the Orfalea College of Business realize its own purpose: becoming the leader in experiential business education.

“It is fitting that the college be named to honor the spirit of entrepreneurship and strength of character he has exhibited during his career.”

— Former Dean William Pendergast said of Paul Orfalea, founder of Kinko’s
What’s Next:

Dean Scott Dawson surveys five projects set to change the Orfalea College of Business from the inside out.

We’re on the edge of something big here.

Since joining the Orfalea College of Business last year, I’ve been so impressed by the way Learn by Doing has prepared decades of alumni to lead businesses all over the world.

On campus, we can feel momentum building. Industry leaders seek more of our graduates every year. Recently, Payscale.com and Bloomberg Businessweek have praised the return on investment of a Cal Poly business degree. Now, the Orfalea College of Business has the opportunity to step forward as the leader in experiential business education.

Here is your exclusive look at where the college is going and what it will take to get us there. Supporting any one of the initiatives will have a direct and lasting impact on the students who walk our halls and go on to lead the business world.

Career Readiness

Helps students choose a career and ace the hiring process through intensive workshops, internship programs, and networking opportunities led by a new career readiness advisor.

“New programs like the Business Professionalism Certificate have offered a lot of insight into how to best plan for career fairs, job searches, and critiques of my resume. I felt very confident handing my resume over to employers after the guidance I received from programs offered through Orfalea.”

— Owen Sebo, finance senior, pictured with Career Readiness Advisor Chelsea Kidwell

Continued next page
The Center for Innovation & Entrepreneurship

Expands student programs like pitch competitions, hackathons, career fairs, accelerators and incubators with the right mentors and technology on campus and in the SLO HotHouse.

“The opportunity to work in a new office space, attend workshops, and access endless resources gave me the ability to attract and recruit my development team, who are now my co-founders. Together, we are building something that has the opportunity to make a difference and, in turn, fulfill a shared dream.”

— Jenny Peng (MBA, 2015), founder of TwentySeven

VIDEO Hear from more students in the HotHouse about the impact of the CIE at bit.ly/CalPolyCIE.

Center for Packaging Value Chain

Jumps a new Center for Packaging Value Chain at Cal Poly with a refined undergraduate concentration focused on packaging logistics, a master’s program, professional development resources, research partnerships and industry-leading labs.

“The Learn by Doing education that I have received from our program has prepared me to compete for — and thrive in — top jobs in the industry. Beyond the classes and hands-on labs, I’ve worked as a research assistant for well-known companies and traveled to industry events to network with other professionals.”

— Rebecca Kisch, packaging senior

VIDEO Packaging student Patrick Salibi talks about how the program has changed his life at bit.ly/CalPolyPackaging.

Faculty Fellowships

Bolsters resources to attract and retain top educators as they evolve curriculum to stay in step with fast-moving industries and pursue research opportunities that pushes boundaries.

“The Hood Professorship has given me a lot of confidence to try new things, especially in growing our marketing analytics courses. The support confirms that Cal Poly values the real-life, Learn by Doing opportunities I like to offer students in my courses.”

— Brennan Davis, marketing professor and recipient of the Hood Professorship in Marketing in 2015

Building Upgrades

Remodels Cal Poly’s Business Building, which hasn’t been updated since construction in 1992, with classrooms aligned with modern teaching technologies and collaborative space where students and faculty can work together outside of class.

“Thousands of students come to class and leave the building immediately because of the lack of collaborative space here. Our college emphasizes the importance of building relationships for business success, but we never have the chance to do it. I think if students, mentors and faculty had room to come together, our college network would be a lot stronger.”

— Maddie Rohan, master’s student and Orfalea Ambassador
Every fall, Craig Chrisney (B.S., Business Administration, 1988) gets a phone call. He takes a few moments to talk to the Cal Poly student on the other end of the line about his work, his memories from Cal Poly, but mostly about how great San Luis Obispo is. It’s a time Chrisney looks forward to as he reconnects with his alma mater and gives back to the programs that propelled him to where he is today as a CFO in Pasadena, Calif.

“Talking to students each year is refreshing, and it’s nice to hear about growth on campus,” Chrisney notes. “When they call, I remember to make that donation.”

Chrisney has supported the Orfalea College of Business through the Cal Poly Fund nearly every year since 1990. As he moved from working at a Big Four accounting firm to leading an entrepreneurial incubator called Idea Lab, he continued growing his contributions because he felt so passionate about the stellar reputation of Cal Poly in the business world.

“I really value the education and opportunities that were afforded to me because of my education at Cal Poly. I want to give back and make sure others have the same opportunities.”

Ongoing contributions like Chrisney’s are critical to the college’s Dean’s Excellence Fund. Gifts large and small add up, giving the college flexibility to support emergent needs throughout the school year. Every year more than 900 donors give back to the college through the annual fund, which does everything from hiring new faculty to purchasing essential classroom technology.

Fellow alumni like Wendy Craig, partner at Ernst & Young, have found a way to double the impact of their annual contributions. Craig started with just a $25 contribution upon graduating in 1998. Over her 17-year career, EY has matched each donation.

“For me, I started out with a modest salary, but I knew I could still do a match,” Craig said of her first gift. “Each year, as my salary increased, it seemed like my giving to Cal Poly should increase as well.”

Her gifts make a direct impact on Cal Poly’s accounting program enabling it to host recruiting fairs, industry tours, and club events that help nearly 100 percent of accounting students secure internships and jobs long before graduation.

Craig now serves as an ambassador for EY’s gift matching programing, helping fellow employees — and fellow Cal Poly alumni — double their impact on the program that gave them their start.
Cal Poly alumnus Rich Jacobsen (B.S., Business Administration, 1985) operates in a base-10 world, with mergers and acquisitions ruling his day. As managing director of Greenhill & Co., a leading independent advisory firm in the heart of San Francisco’s Financial District, his head is in time zones thousands of miles away, where markets are in full swing long before sunrise in the West.

With a glance toward the fog peeling back behind the Golden Gate Bridge outside his office, Jacobsen begins a daily ritual — assembling his to-do list by using the same organizational method he learned from Cal Poly Professor Don Yale nearly 30 years ago. From daily tasks to multi-billion dollar mergers and acquisitions, Jacobsen can trace his success back to his time with the accounting and finance faculty in the Orfalea College of Business who ignited his interest in the field.

“Most of my instructors were professors with years of teaching experience who were enthusiastic about their subjects and had an ability to connect with students on a personal level,” Jacobsen said. “They had an outstanding understanding of their subject but also knew how to teach the material in an effective manner.”

Professors like Mary Beth Armstrong, Alan Bailey, Jan Duffy, and Ken Reiner helped thousands of Orfalea College of Business students, including Jacobsen, amass a wealth of practical knowledge in accounting, law and finance. According to Rami Shani, Orfalea’s associate dean for faculty and research, those close relationships are central to Cal Poly’s approach to education. Small class sizes and the university’s Learn by Doing philosophy also mean students have meaningful one-on-one interaction with seasoned educators, not just teaching assistants.

With these professors helping Jacobsen blend his technical
abilities with confidence, he made the leap from Grand Avenue to Wall Street. But throughout his career, Jacobsen noticed how major financial firms were consistently overlooking Cal Poly graduates in favor of those from more elite institutions.

“Many firms are not familiar with the high quality of graduates coming out of the Orfalea College of Business, and thus it is difficult for students to earn the opportunity to interview for financial analyst positions at top Wall Street firms,” Jacobsen said. So he decided to do something about it.

Recently, Jacobsen has turned back to Cal Poly to make a strategic investment in Orfalea College of Business faculty who are inspiring today’s class of financial professionals.

As part of a major gift to the university, Jacobsen and his wife, Margaret, established the Jacobsen Faculty Fellowship, jumpstarting the college’s initiative to attract and retain leading instructors committed to preparing career-ready graduates through Learn by Doing. The award will support one professor each in accounting, economics and finance who exemplify Cal Poly’s teacher/scholar model while innovating curriculum and mentoring fellow faculty members. Most importantly, the award will recognize educators with a track record for motivating their students toward greatness in fields known for staunch competition.

“Faculty members are the building block for all the college hopes to achieve, particularly those teachers who can develop curriculum that will be responsive to the evolving external business environment,” said Shani.

“By being engaged in diverse collaborative research projects with industry, our faculty develop the ability to enhance, refine and initiate innovative academic curriculum that is vital to practice.”

With the right faculty leading the way, Jacobsen believes the prowess of Cal Poly graduates will garner the attention it deserves among other big-name schools. “While some graduates of elite schools take an analyst position for granted, Cal Poly students are willing to ‘run through walls’ to make the most of their opportunity,” Jacobsen said of his experience with new hires at Greenhill.

In the long run, Jacobsen knows there will be a sizable return on his investment in Orfalea College of Business faculty in the accounting, finance and economics fields. Jacobsen is looking to recruit more Cal Poly graduates from those programs at Greenhill through internships and entry-level positions. He has even welcomed cohorts of Cal Poly business students to his firm for in-depth industry tours spotlighting competitive careers in finance. Jacobsen sees the virtuous loop growing as more alumni rise into leadership positions in these industries and hire more Cal Poly graduates.

“The Cal Poly students I have recruited over the years have performed at a high level,” he said. “This is a win-win-win for firms like mine, for the students and the college.”

But Jacobsen’s effort doesn’t end here. He hopes that his fellow Orfalea College of Business alumni recognize that faculty played a role in their success and seize this initiative to support truly excellent educators. “There have been many graduates from the college of business over the years that have gone on to achieve great success,” Jacobsen adds. “Margaret and I hope that a few of them will read this article and reach out to the college to explore ways that they can help, too.”
Professor Milton Drandell set foot on Cal Poly’s campus for the first time in 1972. More than 40 years later — even after his death — he still finds a way to cross paths with the Orfalea College of Business’ best students, thanks to the generosity of his family.
Drandell was a dynamic character — a lover of tennis, travel and music — who was, at heart, a numbers man. After earning his doctorate in mathematics from UCLA, he led a 15-year career in IBM’s marketing division as the corporation pioneered the early computer.

Drandell stepped away from the corporate world to begin his tenure at Cal Poly teaching quantitative methods, which surveyed database management and quantitative controls in business operations. His work would help provide the foundation for the information systems concentration that exists at Cal Poly today.

Milt, as his wife Ruth called him, was known for his sense of humor and wit, something his students would often note in his instructor evaluations. Drandell retired in 1986 and continued to teach a few classes at Cal Poly while writing a book about his experience at IBM.

When Drandell passed away in 1990, his family realized how much he cherished his teaching experience at Cal Poly. With a $3,000 gift in hand including other contributions from friends, Mrs. Drandell established the Milton Drandell Memorial Scholarship Endowment to support the education of one outstanding information systems student each year. As the endowment principal grew to $22,000, so did the scholarship’s disbursement to students preparing for their senior year in the Orfalea College of Business.

In 1997, that student was Stacey Pham (nee Chu). She quickly rose to the top of the information systems discipline with a near-perfect GPA and an ambition to work in technology. That year, the San Jose native used the scholarship to buy vital software for her Learn by Doing senior project. But Pham quickly realized the scholarship meant something more.

“Far beyond the financial benefit, the scholarship was a significant encouragement for me,” Pham recalls. “My hard work was recognized, and I felt that I would owe the scholarship sponsor a commitment to succeed. The award made me feel proud of myself.”

Pham met Mrs. Drandell in the spring of 1997 at an Orfalea College of Business scholarship banquet where the two made an instant connection. Pham took it upon herself to update Mrs. Drandell on her success at Cal Poly and her internship with Hewlett Packard that summer.

Their relationship did not stop there. As Pham’s career continued to evolve in the technology sector, she never failed to stay in touch. “Every year, I would get a holiday card from Stacey with an update,” Mrs. Drandell said. “A few years later, I also received a wedding announcement, and eventually I saw she had two daughters. It’s been a pleasure to watch Stacey grow.”

Pham is just one of 25 students the scholarship has touched. Over the years, Mrs. Drandell has enjoyed seeing how her husband’s memory continues to support the best of Cal Poly. “I have had the utmost pleasure and pride knowing that excellent students have been chosen for this award for their fine character and academic records,” she said.

In 2015, information systems junior Jillian Zdepski won the scholarship for her academic excellence and leadership of her peers. Zdepski says she feels humbled by the Drandell family’s generosity as she looks toward her last year at Cal Poly. “As a senior and executive board member of the Information Systems Association, I have truly found home in the concentration among my peers and professors.”

From her home in San Luis Obispo, Mrs. Drandell’s thoughts are never far from Milton and the life they shared together.

“I feel sure this is the best legacy for him.”
**By the Numbers:**
A look at philanthropy in the Orfalea College of Business

Your contributions add up to something bigger. The Orfalea College of Business builds endowment funds for the purpose of generating income in perpetuity from gifts invested in the college. Gifts made throughout the year enable the college and its academic areas to provide timely support for Learn by Doing projects and extracurricular programs. Together, these funds ensure a sustainable future for the Orfalea College of Business as it prepares career-ready graduates. Totals reflect the Orfalea College of Business accounts as of June 30, 2015.

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<th><strong>$2,494,001</strong></th>
<th>Gifts and commitments raised during fiscal year 2014-15</th>
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<td>Orfalea Foundation Endowment</td>
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<td>Other College Endowments</td>
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<td><strong>$1,498,320</strong></td>
<td>Endowment Payouts during fiscal year 2014-15</td>
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COMING BACK, GIVING BACK:
Orfalea’s advisory councils, boards and task forces help guide new curriculum and smart growth.

In a world as fast-paced as business, how does an institution like Cal Poly keep up?

“It’s pretty simple,” says Dean Scott Dawson. “You listen to the right people.”

The Orfalea College of Business is guided by a dedicated cohort of volunteers — many of them alumni who serve on advisory councils and time-sensitive task forces. Armed with a deep knowledge of the technologies and trends impacting their industries, these seasoned leaders work with college administrators and faculty to ensure curriculum adapts to the demands of emerging positions in major corporations, small businesses, and the startup sector.

“I think it’s important to ensure that our curriculum stays current with cutting-edge innovation and developments in the industry,” said Greg Rodrigues (B.S., Business Administration, 1984), alumnus and owner of Western Land Financial. “Experts who are actively involved with Cal Poly are also more likely to hire our grads.”

Recently, volunteer insights have translated into new classes soon appearing in the Orfalea College of Business course catalog. The Dean’s Advisory Council’s (DAC) sub-committee on data analytics played a direct role in shaping a certificate and master’s program in business analytics, which debuts in 2016. Alumni leaders like Rodrigues and Lori DeMatteis of Emerson Network Power worked with Associate Dean for Graduate Programs Sanjiv Jaggia to mold course content aimed squarely for the projected growth in the data analysis job market.

“We want to ensure that future students have the same high-quality experience at Cal Poly so they achieve similar — if not greater — success.”

— Steve Kitson, DAC Chair

“Long term, I think we have made sure curriculum allows for students to develop critical-thinking skills, teamwork skills, and soft skills, which can be overlooked.”

Area and program advisory boards also help the Orfalea College of Business think ahead.

The college’s Accounting Advisory Board, which consists of Big Four and other public accounting firm partners and professionals, is guiding the Accounting area to expand and prepare 200 CPA-eligible graduates each year by 2017. The Packaging Advisory Board has also helped Cal Poly’s Packaging program advance toward a variety of goals, including strengthening a specialty in healthcare packaging. The Industrial Technology Advisory Board has supported digital fabrication upgrades in the program’s Learn by Doing labs. Meanwhile, Marketing area task forces, with representatives from Teradata, Level and Core Logic, have helped launch an integrated marketing communications minor and several data-driven marketing analytics courses in 2015.

“We are fortunate to have so many alumni and industry partners invested in the success of our students and our programs,” said Dean Dawson. “Their leadership and generosity moves us forward.”
The Orfalea College of Business
Dean’s Advisory Council

For a complete list of area advisory boards and task forces, visit www.cob.calpoly.edu/advisory-groups.

Trevor Ashley
B.S., Business Administration, ’03
Principal
Glenbrook Consumer Partners

Simon Arkell
MBA, ’94
CEO/Co-Founder
Predixion Software Inc.

Dolores Bernardo
B.S., Business Administration, ’96
Leadership Development Lead
Airbnb

Ryan Bristol
B.S., Business Administration, ’99
Executive Director
JP Morgan

Bill L. Chillingworth
B.S., Business Administration, ’78
Managing Principal
The Investment Real Estate Exchange

Phil Cohl
Senior Portfolio Manager / Senior VP
Stifel Nicolaus

Donal Conroy
VP Finance
Apple

Scott Cooper
B.S., Business Administration, ’91
CFO
WaveTec Vision Systems Inc.

Wendy Craig
B.S., Business Administration, ’98
Assurance Partner
Ernst & Young

Dan Delaney
B.S., Business Administration, ’00
Investment Professional
Industrial Growth Partners

Lori DeMatteis
B.S., Business Administration, ’85
Vice President
Emerson Network Power

Pete Feldman
B.S., Business Administration, ’90
Executive Director, Global Marketing
Amgen

Rik Floyd
B.S., Economics, ’79
California Licensed Professional Fiduciary
Foster Thornton LLC

Kim Hibler
B.S., Business Administration, ’81
Vice President of Global Sales-SaaS Division
Citrix

Lisa Hufford
B.S., Business Administration, ’93
Founder & CEO
Simplicity Consulting

Stuart Jenkins
SVP Innovation & Product Development
Deckers

Charles King
B.S., Economics, ’87
Partner
King Asset Management

David V. Kinney
B.S., Business Administration, ’85
Founder & Owner
The Kinney Group

Steve Kitson
B.S., Business Administration, ’74
Partner (Retired)
PricewaterhouseCoopers

Stephen Leider
B.S., Business Administration, ’77
Managing Partner
Lee & Associates

Chris Leone
Senior Vice President
Applications Development
Oracle

B. Quentin Lilly
B.S., Business Administration, ’83
President, Home Entertainment Services
Technicolor Inc.

Ron Lopes
B.S., Business Administration, ’88
Partner
KPMG

Mark Lynch
Finance Manager
Chevron

Kevin MacKenzie
B.S., Business Administration, ’99
Senior Managing Director
HFF

Matt Macomber
B.S., Economics, ’95
Managing Director
Blackrock

Ryan Martinez
B.S., Business Administration, ’97
Vice President
Berstein Private Wealth Management

Shari Moore
B.S., Business Administration, ’89
Senior Vice President of Human Resources
Jasper

Kelly Neary
B.S., Business Administration, ’07
International Operations
Nest

Peter M. Oser
B.S., Business Administration, ’79
President and CEO
Anixter & Oser Inc.

Steve Prickett
B.S., Industrial Engineering, ’78
Senior VP-Wealth Management
Merrill Lynch

Gregory A. Rodrigues
B.S., Business Administration, ’84
Owner
Western Land Financial LLC

Horacio Saavedra
Sr. Business Mgr. Program Planning (Retired)
Northrop Grumman Aerospace Systems

Martin J. Skrip
Partner In Charge — Tax
Crowe Horwath LLP

Bruce A. Smith
B.S., Business Administration, ’79
VP Strategic Partners & Private Exchanges
Vision Service Plan

Joanne M. Smith
B.S., Business Administration, ’82
Sr. Vice President, In-Flight Service
Delta Air Lines

Mark Vranesh
B.S., Business Administration, ’90
Chief Financial Officer
App Annie

Bransby Whitton
B.S., Chemistry & Environmental Engineering, ’97
Executive Vice President
PIMCO

Brett Wingo
B.S., Industrial Technology, ’89
Vice President/General Manager
Cisco

Kris Yetter
B.S., Business Administration, ’81
President
Promega Biosciences Inc.
TOP 5 WAYS TO GIVE BACK TO THE ORFALEA COLLEGE OF BUSINESS

Reach out to the Orfalea College of Business advancement team to discuss how your passion can turn into possibilities for our students.

1. Mail in Your Donation
Use the envelope enclosed in this magazine to mail in your year-end donation to the Orfalea College of Business.

2. Give Online
Visit www.giving.calpoly.edu to make your contribution to the college or your favorite academic program.

3. Match Your Gift
Double your support of Learn by Doing by leveraging your employer’s matching program at www.giving.calpoly.edu/matching.

4. Give Through Payroll Deductions
Set up a simple payroll deduction through your human resources department to support Cal Poly throughout the year.

5. Plan Your Gift
Include the Orfalea College of Business in your estate plans to leave a legacy on campus by visiting www.plannedgiving.calpoly.edu.
Define Your Legacy at Cal Poly

By naming Cal Poly as a beneficiary of your retirement plan or life insurance policy, you are able to support the university tax-free. These gifts are simple and only require an update to your beneficiary form, not a change to your will. Just like any other donation, you may direct your future gift to support the department or program of your choice.

It’s your legacy. Explore it.

How to Name Cal Poly as a Beneficiary

1. Contact the administrator of your retirement account or insurance company for a change-of-beneficiary form.

2. Name Cal Poly as the beneficiary of a specific percentage of your plan. California Polytechnic State University Foundation Federal Tax ID: 20-4927897

3. Return the form to your plan administrator and send a copy to Cal Poly.