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**To:** [pcbodist@coyote.csusm.edu](mailto:pcbodist@coyote.csusm.edu)  
**Subject:** [Pcbodist] Foundation Project Administration Program  
**Date:** Wednesday, November 10, 2021 9:50:55 AM  
**Attachments:** [Foundation Project Administration Guidelines 11.04.21.pdf](#)  
[Spending Plan Form sample.pdf](#)  
[ATT00001.txt](#)

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## Partners in Campus Business Operations Foundation Project Administration Program

*Sent on Behalf of: University Advancement*

Hello Campus Partners,

We are excited to share some updates on the Foundation Project Administration Program.

**Foundation Project Administration** was established within University Advancement as a resource for our campus partners and to ensure our campus fiduciary responsibilities on behalf of our donors.

- We offer support, guidance, education, and training on the use of Foundation project funds.

**Foundation Project Administration Guidelines** are now available (attachment), which will be posted to the campus website soon.

- Outline roles and responsibilities
- Ensure donors' contributions are being utilized as intended
- Provide contact information, tools, and resources
- Offer guidance on frequently asked questions

**NEW - Foundation Project Spending Plan document**

- **Effective November 2021** - In an effort to ensure donors' contributions are being utilized as intended, stewarded, and administered, a spending plan form will be required for annual endowment spend allocations and campus programs with minimal-to-no financial activity.
- Foundation Project Administration will send the required spending plan form and instructions to the identified Project Directors to complete.  
Those with fiscal authority to the respective Foundation project will also receive a copy of the completed spending plan form.

**Foundation Project Spending Plan Process** timeline for FY 2021/22:

- On or before December 10, 2021
  - Project Directors shall submit the completed spending plan form
- December 2021 – January 31, 2022
  - Foundation Project Administration and University Advancement will review/sign the spending plan form
- On or before February 28, 2022
  - Project Directors and assigned fiscal authorities will receive a copy of the completed spending plan form
- March – June 2022
  - Foundation Project Administration will review/monitor expenditures to the spending plan

Stay tuned for upcoming training dates to learn more about Foundation Project Administration!

Thank you,  
Veronica

*Veronica Roman*

Endowment/Program Manager

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