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To: Pcbodist@coyote.csusm.edu
Subject: [Pcbodist] PCBO Notice: Info Session for Foundation Project Endowments and Campus Programs
Date: Monday, March 1, 2021 7:04:08 PM
Attachments: [ATT00001.txt](#)



Partners in Campus Business Operations Information Sessions for Foundation Project Endowments and Campus Programs

Sent on Behalf of: University Advancement

Dear PCBO Community:

We are pleased to announce two additional training opportunities for those who were unable to attend the scheduled Program/Endowment Info Session.

We will have an open forum on the following dates/times. Please reserve one of the dates below:

Tuesday, March 9th 1:30-3:00pm - <https://csusm.zoom.us/j/88691324259>

Monday, March 15th 1:30-3:00pm - <https://csusm.zoom.us/j/84629739514>

As fiduciaries of donor funds, this training is an opportunity to provide guidance and support to the campus community ensuring funds are spent accordingly and to donor intent. This training will apply to all Project Directors, Fiscal Authorities, and College/Department budget analysts.

Training outreach, in collaboration with the Endowment/Program Manager, Auxiliary Accounting, and Donor Relations will consist of the following:

- Informing Project Directors and Fiscal Authorities on their fiduciary responsibility on use of funds
- Review of project agreement purpose

- Review of project balances including how to access project balances in Data Warehouse
- Donor Relations

Thank you for your support in ensuring we are good stewards of our donors' gifts.

Thank you,
Veronica

Veronica Roman

Endowment/Program Manager

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