

# Memorandum



CalPolyPomona

Philanthropic  
Foundation

Date: \_\_\_\_\_

To: Frances Teves  
Vice President, University Advancement

Copy: AVP, Development  
ED. Advancement Services  
Gift Processing Specialist

From: \_\_\_\_\_

Subject: CSU Policy 15701

**APPROVAL**

Fundraising events with gross receipts greater than \$5,000 must be approved in writing by a delegated authority when the fundraising event utilizes the university name, logo or trademarks and represents that the university will benefit from the proceeds. Prior to the event, the delegated authority shall review the fundraising event’s budget, drafts of solicitation materials, and action plan to comply with federal, state and local regulations.

Per the CSU Policy 15701, the \_\_\_\_\_ is requesting approval for an event.  
A draft of the invitation, marketing materials, solicitation materials, and budget is enclosed.

Event Summary

- First-time or repeated event \_\_\_\_\_
  - Ticket cost is \_\_\_\_\_ per person
  - \_\_\_\_\_ will cover dinner expense
  - \_\_\_\_\_ donation to \_\_\_\_\_
  - All proceeds from Silent/Live Auction will go towards (if applicable)
- \_\_\_\_\_
- REQUIRED for Auctions: Does this event include an auction component?      Yes      No
  - REQUIRED for Auctions: If yes, have you contacted the Gift Processing Office?      Yes      No

**BUDGET**

The budget must sufficiently detail anticipated revenues and expenditures to project net revenue and quid pro quo benefits. The Internal Revenue Service requires fundraising events with gross receipts greater than \$5,000 to report the following revenue and expenditure categories:

Category	Anticipated Revenue or Expenditure
1. Gift income	
2. Non-gift income	
3. Cash prize expenditures (enter #3 - #8 as a <b>NEGATIVE</b> number)	
4. Non-cash prize expenditures	
5. Rent or lease of property/facilities expenditures	
6. Food and beverage expenditures (include service fees, taxes)	
7. Entertainment expenditures	
8. Other direct expenditures (labor/wages for worker/contractors)	
<b>Subtract lines 3-8 from lines 1-2 for NET PROCEEDS:</b>	

Vice President of Advancement Approval \_\_\_\_\_ Date \_\_\_\_\_