



CalPolyPomona

Philanthropic
Foundation

POLICIES AND PROCEDURES

Subject:	Events Policy	Policy No.	113
		Date:	01/2021
		Revised:	02/2024

PURPOSE:

It is the policy of the Cal Poly Pomona Philanthropic Foundation that fundraising solicitations meet federal, state and local law requirements, fundraising solicitation materials are accurate and truthful, and fundraising costs are reasonable. This policy addresses due diligence and reporting requirements specific to fundraising events and complies with [CSU Policy 15701.00](#).

In addition, it is the policy of the Cal Poly Pomona Philanthropic Foundation that all events use University Advancement's event platform. Or, if University Advancement's event platform is not utilized that the event be approved in advance to ensure the attendees, sponsors, and all event details and requirements are tracked in University Advancement's constituent and donor management system.

POLICY:

Free or Events with Gross Receipts Under \$5,000

Effective July 1, 2019 all events utilizing Advancement data that requests a charitable contribution or invites university donors or alumni must be approved in writing by the appropriate University Advancement administrator.

Events with Gross Receipts \$5,000+

Effective July 1, 2019, all fundraising events with gross receipts greater than \$5,000, non-charitable/non-fundraising event proceeds being deposited into the Philanthropic Foundation or events without proceeds must be approved in writing by a delegated authority when the event utilizes the university name, logo or trademarks and represents that the university will benefit from the proceeds or result in a charitable contribution receipt for participants by the university or its auxiliary organizations.

Delegated Authority

The Vice President for University Advancement, as the delegated authority, shall review the event memo, any fundraising event's budget, drafts of any solicitation materials, and action plan to comply with federal, state and local regulations and will respond in writing.

PROCEDURE:

The requesting party will work with their college/unit fundraiser on the purpose of the event, budget, solicitation materials, and action plan to comply with federal, state, and local regulations.

The college fundraiser will submit the event’s budget, drafts of solicitation and/or event materials, and action plan to comply with federal, state and local regulations, along with both the [Event Approval Form](#) and [Event Approval Memo](#)* (*only for fundraising events with gross receipts greater than \$5,000) to the Executive Director of Advancement Services. All materials should be received at least 90 days prior to the event date.

The Executive Director of Advancement Services will work with the Vice President for University Advancement to review, approve or deny the materials and respond, in writing.

INFORMATIONAL PROCESS FLOW:

