

Memorandum



CalPolyPomona

Philanthropic
Foundation

Date: _____

To: Frances Teves
Interim 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 NEGATIVE 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)	
Subtract lines 3-8 from lines 1-2 for NET PROCEEDS:	

Vice President of Advancement Approval _____ Date _____