

FUNDRAISING EVENT APPROVAL FORM INSTRUCTIONS

Overview

CSU Long Beach University Relations and Development requires fundraising events to be approved in writing when the event utilizes the University name, logo, or trademarks and represents that the University will benefit from the proceeds. Prior to the event's announcement, 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.

Common Questions?

Where can I find the Fundraising Event Approval Form?

The CSULB Fundraising Event form can be found at the following website:

http://web.csulb.edu/sites/intranet/files/2014/06/Fund_Raising_Event-11.17.2016.pdf

Who approves the Fundraising Event Approval Form?

The Fund Raising Event Approval form must be completed by the following four approvers: Associate Vice President (AVP) for University Relations and Development (URD), Associate Vice President (AVP) for Financial Management (FM), Chief Operating Officer (COO) for the Research Foundation (FDN), and University Controller.

Can attachments be added to the Fundraising Event Approval Form?

Yes, you can add attachments to the Fundraising Event Approval Form.

What software is required to submit the Form?

The workflow submission process on the Fundraising Event Approval Form requires Adobe Acrobat Professional.

Where to send the Form?

Completed forms, or questions regarding form completion or submission, should be sent to Michael.Losquadro@csulb.edu.

Completing & Submitting the Fundraising Event Approval Form

Requestor Information

In this section, enter information regarding the person requesting the event.

Requestor Information

CSULB ID: _____ Name: _____ Title: _____ Extn: _____

Dept ID: _____ Department Name: _____

Processing Step / Field Name	Screenshot / Description
CSULB ID:	Enter the 9-digit CSULB employee identification value. Required.
Name:	Enter the name of the requestor. Required.
Title:	Enter the title of the requestor. Required.
Extn:	Enter the telephone extension of the requestor. Required.
Dept ID:	Enter the department ID of the requestor. Required.
Department:	Enter the department name of the requestor. Required.

Event Details

In this section, enter the detailed information about the event.

Event Details

Event Name: _____ Event Date:

Event Location: _____

Summary of Activities: _____

Draft Solicitation Materials: _____

Cost Per Ticket: _____ Projected Attendance: _____ Estimated Staff Hours: _____

Processing Step / Field Name	Screenshot / Description
Event Name:	Enter the name of the event. Required.
Event Date:	Enter the date of the event. Required.
Event Location:	Enter the location of the event. Required.
Summary of Activities:	Enter a summarized list of activities. Required.
Draft Solicitation Materials:	Attach a draft of the solicitation material
Cost Per Ticket:	Enter the cost per ticket to attend the event. Required.
Projected Attendance:	Enter the projected number of persons attending the event. Required.
Estimated Staff Hours:	Enter the estimated number of hours the staff will be working. Required.

Event Risk Controls

In this section, answer the risk management questions and enter the relevant information about the activity.

Event Risk Controls

Will the event have the following activities? If the answer is "Yes", then please describe or attach the documentation.

Yes No An auction? _____

Yes No Serve alcohol? _____

Yes No A Raffle? _____

Yes No A controlled game such as "Casino/Gaming"? _____

General Comments: _____

Processing Step / Field Name	Screenshot / Description
An auction?	Select the appropriate checkbox if the event will have an auction. Required.
Serve alcohol?	Select the appropriate checkbox if the event will serve alcohol. Required.
A Raffle?	Select the appropriate checkbox if the event will have a raffle. Required.
A controlled game such as "Casino/Gaming"?	Select the appropriate checkbox if the event will have a controlled game such as "Casino/Gaming". Required.
General Comments:	Enter any comments that may help the approval process.

Required Event Budget

This section requires the budget's chartfield information.

Required Event Budget

Chartfields for Revenue & Expenses: Fund: CL500 Dept: _____

Chartfields for Net Income/Loss: Fund: _____ Dept: _____ Class: _____

The budget must sufficiently detail anticipated revenue and expenditures to project net revenue and any exchange of goods or services.

(Assigned Upon Approval)

Project: _____

CashNet Code: _____

Processing Step / Field Name	Screenshot / Description
Revenue & Expenses Fund:	Enter the LBFND Fund for the Revenue and Expenses. Required.
Revenue & Expenses Dept:	Enter the Department for the Revenue and Expenses. Required.
Net Income/Loss Fund:	Enter the LB49R Fund for the Net Income/Loss statement. Required.
Net Income/Loss Dept:	Enter the Department for the Net Income/Loss statement. Required.
Class:	Enter the Class for the Net Income/Loss statement, if needed.
Assigned Upon Approval Project:	The Project will be entered by General Accounting after the form is approved by the COO of the Research Foundation. Required by the GA.
Assigned Upon Approval CashNet Code:	The CashNet Code will be entered by General Accounting after the form is approved by the COO of the Research Foundation. Required by the GA.

Revenue

In this section, enter the estimated revenue from the event.

Revenue	Amount	Description
Auction Revenue:	_____	_____
* Raffle Revenue:	_____	_____
Sponsorship Revenue:	_____	_____
Ticket Revenue:	_____	_____
Other Revenue (Please specify):	_____	_____
Total Revenue:	_____	

* Raffles will be reviewed and approved by CSULB Research Foundation

Processing Step / Field Name	Screenshot / Description
Auction Revenue:	Enter the estimated revenue from an auction.
Raffle Revenue:	Enter the estimated revenue from a raffle. The revenue received from raffles will be reviewed and approved by CSULB Research Foundation.
Sponsorship Revenue:	Enter the estimated revenue from the sponsors.
Ticket Revenue:	Enter the estimated revenue from tickets.
Other Revenue (Please specify):	Enter the estimated revenue from other sources.
Total Revenue:	This is a calculated field for the total revenue.

Expenses

In this section, enter the estimated expenses occurred from the event.

Expenses	Amount	Description
Entertainment Expenditures:	_____	_____
Food/Beverage Expenditures:	_____	_____
Facility Expenditures:	_____	_____
Printing/Publicity Expenditures:	_____	_____
Admin Fees:	_____	_____
Credit Card Fees:	_____	_____
Total Expenses:	_____	
Total Net Income:	_____	

Processing Step / Field Name	Screenshot / Description
Entertainment Expenditures:	Enter the estimated expenses for entertainment.
Food/Beverage Expenditures:	Enter the estimated expenses for food and beverages.
Facility Expenditures:	Enter the estimated expenses for the events facilities.
Printing/Publicity Expenditures:	Enter the estimated expenses for printing and publicity.
Admin Fees:	Enter the estimated expenses for the administration fees. Assume Research Foundation's 6% admin fee on all revenue.

Processing Step / Field Name	Screenshot / Description
Credit Card Fees:	Enter the estimated expenses for the credit card fees. Assume 2.5% on all transactions made by credit card.
Total Expenses:	This is a calculated field for the total expenses.
Total Net Income:	This is a calculated field for the total net income.

Fundraiser Contractor

This section is completed only if a fundraiser contractor is utilized.

Fill-out only if you plan to utilize services of a contract fundraiser (Attach copy of draft contract)

Will the Fundraiser have Custody of Contributions? Yes No

Estimated Gross Receipts: _____

Amount Paid to Fundraiser: _____

Amount Paid to Foundation: _____

Processing Step / Field Name	Screenshot / Description
Will the Fundraiser have Custody of Contributions?	Select the appropriate checkbox if the fundraiser will have custody of contributions.
Estimated Gross Receipts:	Enter the estimated Gross Receipts and a brief description.
Amount Paid to Fundraiser:	Of the estimated Gross Receipts, how much will be paid to the Fundraiser?
Amount Paid to Foundation:	Of the estimated Gross Receipts, how much will be paid to the Foundation?

Policy, Terms and Condition

This section contains the CSULB Fundraising policy and its terms and conditions.



Policy, Terms and Conditions

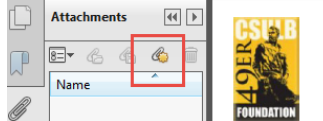
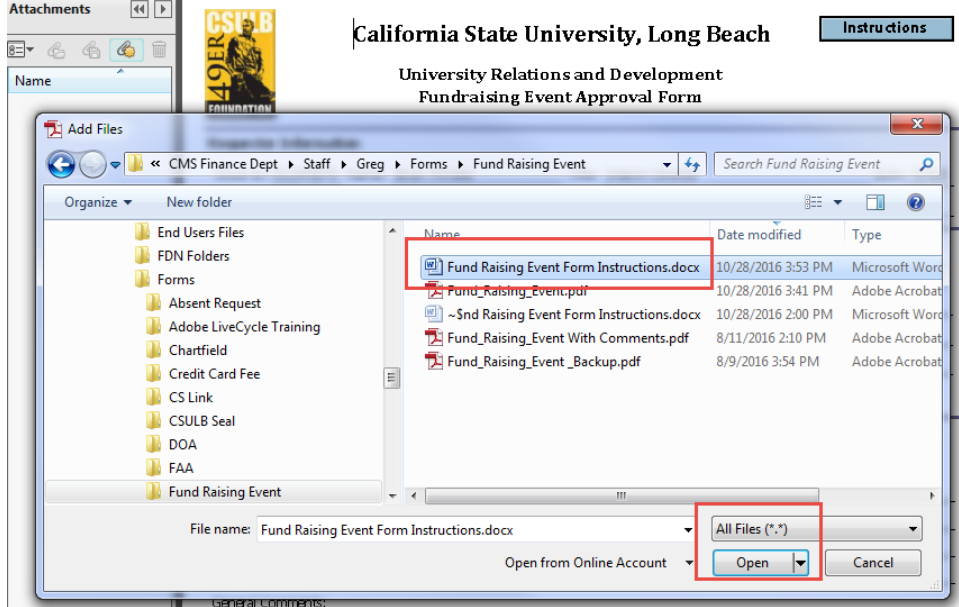
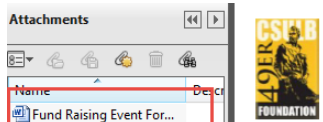
Fundraising events with expected gross receipts greater than \$5,000 or those with plans for an auction or raffle of any size must be approved in writing by the delegated authority when the fundraising event utilizes the University name, logo, or trademarks and represents that the University will benefit from the proceeds. Prior to the event's announcement, 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.

- All marketing, solicitation, and/or registration materials must be submitted with form.
 - Purchasing will be contacted for any and all venue contracts. Appropriate insurance must be in place prior to event.
 - Please allow 5 working days for approval or changes to the request form.
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Adding Attachments

Attachments may be added if applicable.

Processing Step / Field Name	Screenshot / Description
Click the paper clip icon	 <div style="display: flex; justify-content: space-between; align-items: center; padding: 10px;"> <div style="text-align: center;">  <p>California State University, Long Beach</p> <p>University Relations and Development Fundraising Event Approval Form</p> </div> <div style="border: 1px solid black; padding: 2px 5px; background-color: #e0e0e0;">Instructions</div> </div>

Processing Step / Field Name	Screenshot / Description
Click the new attachment icon	 <p>California State University, Long Beach University Relations and Development Fundraising Event Approval Form</p>
Select the file to attach, and click "Open"	 <p>California State University, Long Beach University Relations and Development Fundraising Event Approval Form</p>
The attach files are displayed	 <p>California State University, Long Beach University Relations and Development Fundraising Event Approval Form</p>

Requestor

This section must be completed by the person requesting the fundraising event.

Requestor By checking this box, I am agreeing to the terms and conditions stated above.

Name: _____ Requestors Email: _____ Date:

Processing Step / Field Name	Screenshot / Description
Requestor. By checking this box, I am agreeing to the terms and conditions stated above.	The Requestor must select the checkbox certifying that they have reviewed and agree to follow the terms and conditions. Required.
Name:	Enter the Requestor's name. Required.
Requestor Email:	The Requestor must include their email address. Required.
Date:	The date the Requestor completed the form. Required.

AVP for URD Approval

This section must be completed by the AVP of University of Relations and Development (URD).

AVP for URD By checking this box, I approve the Fund Raising Event for the above requestor.
 URD Approver: _____ URD Approver Email: _____ Date:

Processing Step / Field Name	Screenshot / Description
AVP for URD Approval. By checking this box, I approve the Fund Raising Event for the above requestor.	The AVP for URD Approver must select the checkbox certifying that they approve the Fund Raising Event for the requestor. Required.
URD Approver:	Enter the URD's Approver's name. Required.
URD Approver Email:	Enter the URD's Approver's email address. Required.
Date:	The date the URD Approver approved the form. Required.

AVP for Financial Management (FM) Approval

This section must be completed by the AVP of URD.

AVP for Financial Management (FM) By checking this box, I approve the Fund Raising Event for the above requestor.
 FM Approver: _____ FM Approver Email: _____ Date:

Processing Step / Field Name	Screenshot / Description
AVP for Financial Management (FM) Approval. By checking this box, I approve the Fund Raising Event for the above requestor.	The AVP for Financial Management Approver must select the checkbox certifying that they approve the Fund Raising Event for the requestor. Required.
FM Approver:	Enter the FM's Approver's name. Required.
FM Approver Email:	Enter the FM's Approver's email address. Required.
Date:	The date the FM Approver approved the form. Required.

COO for the Research Foundation (FDN) Approval

This section must be completed by the COO of FDN.

COO for Research Foundation (FDN) By checking this box, I approve the Fund Raising Event for the above requestor.
 FDN Approver: _____ FDN Approver Email: _____ Date:

Processing Step / Field Name	Screenshot / Description
COO for Research Foundation (FDN) Approval. By checking this box, I approve the Fund Raising Event for the above requestor.	The COO for Research Foundation Approver must select the checkbox certifying that they approve the Fund Raising Event for the requestor. Required.
FDN Approver:	Enter the FDN's Approver's name. Required.
FDN Approver Email:	Enter the FDN's Approver's email address. Required.
Date:	The date the FDN Approver approved the form. Required.

General Accounting Approval

This section must be completed by the University Controller from General Accounting. Once General Accounting receives the form, they must enter the Project and CashNet Code in the "Required Event Budget" section before they can send the final approval.

General Accounting (GA)

GA Approver: _____ GA Approver Email: _____ Date:

Processing Step / Field Name	Screenshot / Description
GA Approver:	Enter the GA's Approver's name. Required.
GA Approver Email:	Enter the GA's Approver's email address. Required.
Date:	The date the GA Approver approved the form. Required.

WORK FLOW SUBMITTAL

There are several points in the process where email notifications will need to be sent. The table below explains the various workflows. The "Date Stamp" fields will automatically populate when the forms are routed.


Workflow Submittal - The Fundraising Event Approval form attached to the Requestor's, URD's, FM's, FDN's, and GA's "**csulb.edu**" e-mail is an acceptable method of authentication, so signatures are not required as long as all e-mails receipts are sent to the URD.


Requestor sends form to the University Relations and Development (URD) for approval.


DATESTAMPS REQ: _____ URD: _____ FM: _____ FDN: _____ GA: _____ Version: 1.0

Processing Step / Field Name	Screenshot / Description
Requestor	<div data-bbox="532 636 1458 663" style="border: 1px solid black; padding: 2px;"> Requestor sends form to the University Relations and Development (URD) for approval. <input type="button" value="Send"/> </div> <p>After the form has been completed, certified, and dated by the Requestor, they will select "Requestor sends form to the University Relations and Development (URD) for approval." from the pull-down menu (default option), and then click on the "Send" button. This will create an editable email with the form attached (pdf file format). It will be addressed to the AVP for URD and the Requestor is copied.</p> <p>If prompted with the Send Email dialog box, select to use the "Default mail application" and then select "Continue".</p> <div data-bbox="526 1031 1187 1476" style="border: 1px solid gray; padding: 10px; margin: 10px 0;"> <p style="text-align: center; border-bottom: 1px solid gray;">Send Email ✕</p> <p>How would you like to send this email?</p> <p><input checked="" type="radio"/> Default email application (Microsoft Outlook)</p> <p><input type="radio"/> Use Webmail</p> <p style="margin-left: 40px;">Select ▼</p> <p><input type="checkbox"/> Remember my choice</p> <p style="text-align: center;"> <input type="button" value="Continue"/> <input type="button" value="Cancel"/> </p> </div>


Processing Step / Field Name	Screenshot / Description
Requestor	<p>A draft email will open in the mail application with text similar to the content below, and it will be addressed to the AVP for URD on the form and the Requestor is copied.</p> <p>.</p> <p><i>[AVP for URD,]</i></p> <p>The attached Fundraising Event Approval form has been completed by <i>[Requestor's Name]</i> and is ready for your review and approval. Detailed instructions on how to complete the process are available by clicking the 'Instructions' button at the top of the page.</p> <p>If you approve this Fundraising Event request, then complete the following steps:</p> <ol style="list-style-type: none"> 1. Complete the 'AVP for URD' approval section on page 2. <ol style="list-style-type: none"> a. Select the approval checkbox. b. Add/Verify your name, date, and email. 2. Complete the Workflow Submittal section at the bottom of page 2. <ol style="list-style-type: none"> a. Select 'University Relations and Development (URD) sends form to Financial Management (FM) for approval.' b. Click the 'Send' button. This will automatically attach the form to a new e-mail and create a standard message for Financial Management. 3. Send the form from your Mail Client. <ol style="list-style-type: none"> a. Click the 'Send' button on your mail client to deliver the mail message. <p>Let me know if you have any questions.</p> <p>Thank you,</p> <p><i>[Requestor's Name]</i></p>

Processing Step / Field Name	Screenshot / Description
AVP for URD	 <p>After the Requestor has routed the form to the AVP for URD, then URD will select "University Relations and Development (URD) sends form to Financial Management (FM) for approval." (default option) from the pull-down menu, and then click on the "Send" button. This will create an editable email with the form attached. It will be addressed to the AVP for FM. The Requestor and the AVP for URD are copied. If prompted, select to use the "Default mail application" and then select "Continue"</p> <p>A draft email will open in your mail application with text similar to the content below:</p> <p><i>[AVP for FM,]</i></p> <p>The attached Fundraising Event Approval form has been completed by <i>[Requestor's Name]</i> and approved by <i>[AVP of URD's Name]</i>. The form is now ready for your review and approval. Detailed instructions on how to complete the process are available by clicking the 'Instructions' button at the top of the page.</p> <p>If you approve this Fundraising Event request, then complete the following steps:</p> <ol style="list-style-type: none"> 1. Complete the 'AVP for Financial Management (FM)' approval section on page 2. <ol style="list-style-type: none"> a. Select the approval checkbox. b. Add/Verify your name, date, and email. 2. Complete the Workflow Submittal section at the bottom of page 2. <ol style="list-style-type: none"> a. Select 'Financial Management (FM) sends form to the Research Foundation (FDN) for approval.' b. Click the 'Send' button. This will automatically attach the form to a new e-mail and create a standard message for the Research Foundation. 3. Send the form from your Mail Client. <ol style="list-style-type: none"> a. Click the 'Send' button on your mail client to deliver the mail message. <p>Let us know if you have any questions.</p> <p>Thank you,</p> <p><i>[AVP for URD]</i></p>

Processing Step / Field Name	Screenshot / Description
<p>AVP for FM</p>	 <p>After the AVP for URD has routed the form to the AVP for FM, then FM will select "Financial Management (FM) sends form to the Research Foundation (FDN) for approval." (default option) from the pull-down menu, and then click on the "Send" button. This will create an editable email with the form attached. It will be addressed to the COO for FDN and the Requestor, AVP for URD, and AVP for FM are copied. If prompted, select to use the "Default mail application" and then select "Continue".</p> <p>A draft email will open in your mail application with text similar to the content below:</p> <p style="text-align: center;"><i>[COO for FDN,]</i></p> <p>The attached Fundraising Event Approval form has been completed by <i>[Requestor's Name]</i> and approved by <i>[AVP of URD's Name]</i> and <i>[AVP of FM's Name]</i>. The form is now ready for your review and approval. Detailed instructions on how to complete the process are available by clicking the 'Instructions' button at the top of the page.</p> <p>If you approve this Fundraising Event request, then complete the following steps:</p> <ol style="list-style-type: none"> 1. Complete the 'COO for Research Foundation (FDN)' approval section on page 2. <ol style="list-style-type: none"> a. Select the approval checkbox. b. Add/Verify your name, date, and email. 2. Complete the Workflow Submittal section at the bottom of page 2. <ol style="list-style-type: none"> a. Select 'Research Foundation (FDN) sends form to General Accounting (GA) to setup chartfields.' b. Click the 'Send' button. This will automatically attach the form to a new e-mail and create a standard message for General Accounting. 3. Send the form from your Mail Client. <ol style="list-style-type: none"> a. Click the 'Send' button on your mail client to deliver the mail message. <p>Let us know if you have any questions.</p> <p>Thank you,</p> <p style="text-align: center;"><i>[AVP for FM]</i></p>

Processing Step / Field Name	Screenshot / Description
COO for FDN	 <p>After the AVP for FM has routed the form to the COO for FDN, then FDN will select "Research Foundation (FDN) sends form to General Accounting (GA) to setup chartfields." (default option) from the pull-down menu, and then click on the "Send" button. This will create an editable email with the form attached. It will be addressed to the University Controller of General Accounting and the Requestor, AVP for URD, AVP for FM, and COO for FDN are copied. If prompted, select to use the "Default mail application" and then select "Continue".</p> <p>A draft email will open in your mail application with text similar to the content below:</p> <p><i>[GA,]</i></p> <p>The attached Fundraising Event Approval form has been completed by <i>[Requestor's Name]</i> and approved by <i>[AVP of URD's Name]</i>, <i>[AVP of FM's Name]</i>, and <i>[COO of FDN's Name]</i>. Detailed instructions on how to complete the process are available by clicking the 'Instructions' button at the top of the page.</p> <p>Please complete the following steps:</p> <ol style="list-style-type: none"> 1. Review and complete the 'Required Event Budget' section. <ol style="list-style-type: none"> a. Review the selected chartfields. b. Add the Project number and CashNet Code in the 'Assign Upon Approval' data fields. 2. Complete the 'General Accounting (GA)' approval section on page 2. <ol style="list-style-type: none"> a. Add/Verify your name, date, and email. 3. Complete the Workflow Submittal section at the bottom of page 2. <ol style="list-style-type: none"> a. Select 'General Accounting (GA) replies to all with the new chartfields.' b. Click the 'Send' button. This will automatically attach the form to a new e-mail and create a standard message for your reply. 4. Send the form from your Mail Client. <ol style="list-style-type: none"> a. Click the 'Send' button on your mail client to deliver the mail message. <p>Let us know if you have any questions.</p> <p>Thank you,</p> <p><i>[COO for FDN]</i></p>

Processing Step / Field Name	Screenshot / Description
<p>General Accounting (GA)</p>	<div data-bbox="532 212 1459 239" style="border: 1px solid black; padding: 2px;"> General Accounting (GA) replies to all with the new chartfields. Send </div> <p>After the COO for FDN has routed the form to General Accounting (GA), the GA will enter the Project and CashNet Code in the "Required Event Budget" section. The GA will select "General Accounting (GA) replies to all with the new chartfields." (default option) from the pull-down menu, and then click on the "Send" button. This will create an editable email with the form attached. It will be addressed to the Requestor, AVP for URD, AVP for FM, COO for FDN, and the University Controller of General Accounting is copied. If prompted, select to use the "Default mail application" and then select "Continue".</p> <p>If prompted, select to use the default mail application and "Continue."</p> <p>A draft email will open in your mail application with text similar to the content below:</p> <p style="text-align: center;"><i>[Requestor],</i></p> <p style="text-align: center;">The attached Fundraising Event Approval form has been approved by <i>[AVP of URD's Name], [AVP of FM's Name], [COO of FDN's Name], and [University Controller of General Accounting's Name]</i>. The new Project number and CashNet code has been added to the Required Event Budget section.</p> <p style="text-align: center;">Please contact me if you have any questions.</p> <p style="text-align: center;">Thank you,</p>
<p>Optional</p>	<div data-bbox="532 1094 1459 1121" style="border: 1px solid black; padding: 2px;"> Optional: Route form to co-workers for validation and questions. Send </div> <p>If a user has a question or would like to email the form to a co-worker, then select "Optional: Route form to co-workers for validation and questions." from the pull-down menu, and then click on the "Send" button. This will create an editable email with the form attached. The email will not be automatically addressed as in the other steps, allowing the user to select the appropriate recipients.</p> <p style="text-align: center;">Content:</p> <p style="text-align: center;">I am in the process of completing the attached form and have the following questions:</p> <p style="text-align: center;">Please respond to the sender of this message for additional comments and questions.</p> <p style="text-align: center;">Thank you,</p>

Processing Step / Field Name	Screenshot / Description
Reset Approvals	 <p>If you experience an error message or problem in sending the form, the “Reset Workflow Approvals” will clear out the timestamps on the bottom of the form (not clear the entire form) and enable you to start the workflow from the beginning.</p> <p>If you select “Reset Workflow Approvals” you will be prompted to confirm your request with “Do you want to reset the workflow approvals?” Select “Yes” to confirm or “No” to return without changes.</p> <p><i>Note: “Reset Workflow Approvals” option will not be available until the applicant has selected “Send” to submit the form to their administrator for approval.</i></p>