



California State University, Long Beach

University Relations and Development Fundraising Event Approval Form

Please note: Fields identified with an asterisk (*) are required.

Requestor Information

CSULB ID*: _____ Name*: _____ Title*: _____ Extn*: _____
Dept ID*: _____ Department Name*: _____

Event Details

Event Name*: _____ Event Date*:
Event Location*: _____
Summary of Activities*: _____
Draft Solicitation Materials: _____
Cost Per Ticket*: _____ Projected Attendance*: _____ Estimated Staff Hours*: _____

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: _____

Required Event Budget

Chartfields for Revenue & Expenses: Fund*: _____ Dept*: _____
Chartfields for Net Income/Loss: Fund*: _____ Dept*: _____ Class: _____
Optional Chartfields for Net Income/Loss: Fund: _____ Dept: _____

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: _____

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

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

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: _____

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.

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

Name: _____ Requestors Email: _____ Date:

AVP for URD By checking this box, I approve the Fund Raising Event for the above requestor.

URD Approver: _____ URD Approver Email: _____ Date:

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:

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:

General Accounting (GA)

GA Approver: _____ GA Approver Email: _____ Date:

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.

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