CSUSB FOUNDATION
Building a Culture of Philanthropy

FUNDRAISING EVENT APPROVAL FORM

Fundraising Event events are conducted for the sole or primary purpose of raising charitable funds where participants make a charitable contribution and a purchase for the fair market value of goods or services. Fundraising events may include dinners, dances, sales of merchandise, concerts, carnivals, golf tournaments, auctions, casino nights, and similar events. **Fundraising events must be approved in writing by a delegated gift authority when the fundraising event utilizes the university name, logo or trademarks and represents that the university or the CSUSB Philanthropic Foundation will benefit from the proceeds.** The Foundation is a not-for-profit corporation that is an auxiliary of CSUSB under agreement with the CSU trustees and is exempt from Federal income tax under Section 501(C)(3) of the Internal Revenue Code. Contributions made to the CSUSB Philanthropic Foundation are tax deductible under section 170 of the IRS Code. This form must be completed and submitted to University Advancement (AD-137) for review and approval. For questions, contact: Director of Gift & Data Services – Sue Gilleland, sue.gilleland@csusb.edu -909-537-7698.

Title of Event:	Date of event:	
Location of Event:	Event Start time:	Event End time:
Type of Event *(dinner, performance, etc.)* :	Estimated Attendance:	
Purpose of Event:		
College/Division:	Department:	
Event Contact:	Phone:	Email:

Additional Events Details

Philanthropic gift account chartfield string:

_____
Account - Fund - Dept - Program - Class - Project

State trust account chartfield string:

_____
Account - Fund - Dept - Program - Class - Project

Total ticket price to attend: _____

Fair Market Value (FMV) of ticket: _____

Tax deductible/donation per ticket: _____

Will your event offer sponsorships?   Yes   No   *(If yes, attach proposed amounts with estimated FMV.)*

Will your event have a raffle?   Yes   No   *(If yes, a Nonprofit Raffle Report form is required after your event.)*

Will your event have an auction?   Yes   No

Delegated Gift Authority Approval of Event - Completed by University Advancement

Signature:	Date:
Print Name:	

I have reviewed/approved event's budget.

(Please attach a copy of proposed budget)   _____ (Initial)

I have reviewed/approved solicitation and materials.

(Please attach copies of all promotional materials)   _____ (Initial)

I have reviewed/approved the event's action plan.

(Please attach a copy of action plan)   _____ (Initial)

Fundraisers, donations, and sponsorships can be complex. Consult with University Office of Philanthropic Giving and Advancement Services for assistance through the process to ensure proper recording of any donations.

After completing all sections, please return with required items to CSUSB Director of Gift & Data Services, in Office AD-137 or email to sue.gilleland@csusb.edu.

Event Action Plan and Event Planning Budget must be submitted with this form

Completed event budget with actual outcomes must be turned in within 30 days of event.

CALIFORNIA STATE UNIVERSITY SAN BERNARDINO

Fundraising Event Planning Budget - Template

Mandatory Information	**Budget Total**	$ -	**Event Name:**	
	Revenue Estimate:		**Date of Event:**	
	Ticket Sales Revenue (Guests x Fair Market Value of Ticket)			
	Ticket Sales-Gift Portion (Guests x Donation amount of Ticket)		**Start & End Time:**	
	Total Ticket Proceeds:	$ -		
			Location:	
	Estimated Sponsorships	$ -		
	Estimated Outright Donations	$ -	**Estimated Attendance:**	
	Projected Net Funds Raised	$ -		

	Estimated	Actual
Audio/Visual & Technical - *vendor name*	$ -	$ -
Catering & Beverage - *vendor name*	$ -	$ -
Design & Décor - *vendor name*	$ -	$ -
Entertainment - *name of group*	$ -	$ -
Facilities & Campus Services	$ -	$ -
Parking/Transportation	$ -	$ -
Photography/Videography	$ -	$ -
Postage & Mail Processing	$ -	$ -
Printed Materials	$ -	$ -
Publicity/Marketing	$ -	$ -
Rentals - *vendor name*	$ -	$ -
Security/Safety	$ -	$ -
Signage (event signage)	$ -	$ -
Supplies & Miscellaneous	$ -	$ -
Venue - *name of venue*	$ -	$ -
Miscellaneous Contingency - 10%	$ -	$ -
TOTAL:	$ -	$ -

EVENT NAME_____		
Event Date_____ **Event Location**_____		

Logistics	**Staff Assignment**	**Due Date**
Prepare projected event budget and submit for approval with fundraising event approval form and action plan		
Determine facility and related needs		
Determine catering needs		
Catering tasting		
Coordinate tech requests (i.e. lighting and sound equipment, microphones)		
Reserve equipment		
Finalize menu selections		
Finalize catering order numbers		
Order any gifts for speaker and/or attendees		
Identify and contact prospective sponsors		
Book photographer and videoprapher (if applicable)		
Secure volunteers and/or student ambassadors		

Program & Perfomers	**Staff Assignment**	**Due Date**
Contact speaker/performer to discuss event		
Finalize speakers for event		
Finalize entertainment for event		
Develop talking points for speakers		
Send draft event scenario/timeline with suggested bullet points/roles and send to planning committee for review		
Send final scenario and guest list to relevant volunteers and staff		
Submit final event scenario, current guest list, table seating assignments and		
Finalize program with presentation/performance flow and times		
Send any updates to relevant volunteers and staff		

Marketing, Invites, Printed Materials & Mailings	**Staff Assignment**	**Due Date**
Create Save the Date		
Email or Print & Mail Save the Date		
Design web landing page		
Request QR Code and Fundraising Link		
Create invitations & RSVP		
Obtain a quote from printing company		
Send invitations to printer		
Stuff invitations, seal and stamp		
Mail and/or email invitations		
Prepare event program		

Invitation List	**Staff Assignment**	**Due Date**
Determine # of projected guests, invite groups and any prospect research or data requests that may be necessary to create guest list		
Create invitation lists – contact Office of Philantropic Giving for any additional invitees they would like to include		
Finalize guest list and send to Planning Committee and University Advancement for		
E-mail or call those invitees who have not responded		
Submit Guest list, final table guests with bio information and seating diagram to President's Office, Directors of Philantropic Giving and Planning Committee		

Pre Event Needs	**Staff Assignment**	**Due Date**
Press Releases (How many, sent when?)		
Finalize seating chart		
Handle any last minute RSVPs		
Directional & Parking Signs & signage for check-in and displays		

EVENT NAME_____		
Day-of Logistics	**Staff Assignment**	**Due Date**
Reserved signs		
Talking points for speakers		
Guest List - Alphabetical by last name and another list by table #		
Table diagram/assignments		
Table linens, table décor		
Event scenario		
Nametags		
Programs		
Event supplies		
Speaker gift/favors		
Registration & Guest Check-in		
Post Event	**Staff Assignment**	**Due Date**
Schedule debrief meeting and discuss follow up items		
Create thank you card for attendees and/or donors		
Mail thank you card		
E-blast follow up video and/or thank you		
Prepare and submit event reconciliation and final budget		