

## RECOGNIZED STUDENT ORGANIZATION EXTERNAL PRIVATE FUNDRAISING APPROVAL FORM

**To Student Organization Solicitor:** The Office of Annual Giving needs to review and approve all private external fundraising events and activities to make sure they meet the education-exemption criteria and make sure all policies and procedures are met.

The Internal Revenue Service (IRS) requires that specific disclosure language must be included on all materials promoting a fundraising event, and on tax receipts sent to donors. The Office of Advancement Services can assist you in creating this statement, which can vary for each event and is important for maintaining accurate gift records. Advancement Services can also assist in the appropriate cash handling and gift processing procedures for events.

Please submit this form to Office of Annual Giving (U-SU 102) prior to developing any materials to publicize, sell tickets for, or seek corporate sponsorships for a fundraising event or activity. All promotional materials will also require the approval of the Office of Communications and Public Affairs, prior to being printed or produced.

### Student Organization Information

Recognized Student Organization Name: \_\_\_\_\_

Type of Fundraising Event or Activity (if you are sending a letter, all correspondence needs to be pre-approved)

Timeframe to Conduct Fundraising Activity: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Email: \_\_\_\_\_

Advisor Name: \_\_\_\_\_

Email: \_\_\_\_\_

Proceeds will benefit: \_\_\_\_\_

**All donations must support recognized student organizations that meet the University's Education Mission. Social student organizations and activities are not included.**

*It is important for us to draw a connection between the donations our university receives and the goals of Cal State LA.*

**Purpose of Fundraiser - Does it meet any of our university strategic priority areas? (Check all that apply)**

- Engagement, Service, and the Public Good
- Student Success
- Welcoming and Inclusive Campus
- Academic Distinction

Has the Business or Company requested a Tax ID/W-9: Yes  No

Business Name: \_\_\_\_\_

Contact Person: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Email to send documentation: \_\_\_\_\_

Is the student organization soliciting a  Gift or  Sponsorship?

(With a gift, the company gets nothing in return, just a tax deduction if the funds are used for an educational purchase. With a sponsorship, it implies that the donor is receiving something in return for their gift, a quid pro quo and that value must be deducted from the net contribution to determine tax-deductible amount. If the sponsor is only receiving recognition, and it is not considered advertising, there may not be any value to net out of the original payment.)

A. Sponsorship Amount: \_\_\_\_\_

(If more than one sponsorship level, please attach a sheet with the details for each level)

B. Goods and Services Provided:

Advertising/Promotion \_\_\_\_\_

Value of additional goods and/or services provided \_\_\_\_\_  
(e.g. dinner, reception, concert, t-shirts, pens, etc.)

*Total value of goods and services provided* \_\_\_\_\_

C. Net Tax Deductible Contribution: \_\_\_\_\_

(By law, the net tax-deductible contribution amount is limited to the excess of the contribution over the value of the goods and services provided.)

### Fundraising Policies and Procedures:

Please read the following policies and procedures thoroughly. Failure to follow these instructions may result in the donation being lost:

1. All monetary donation received, regardless of payment type, (e.g. cash, check, credit card) must be made payable to Associated Students, Inc.
2. The memo section of the final check from your vendor or corporation sponsor must have the name of the event, activity, and recognized student organization they are sponsoring.
3. Check must be sent to: Associated Students, Inc., 5154 State University Drive Suite 203, Los Angeles, CA 90032. A gift receipt will be provided to the business or sponsor on behalf of the University.
4. Please check the box acknowledging that you have read and understand the above guidelines

Approved:

\_\_\_\_\_  
Annual Giving Manager

\_\_\_\_\_  
Date

\_\_\_\_\_  
Director of Advancement Services

\_\_\_\_\_  
Date