

### Event Planning Worksheet

Set up **On-Line Registration**: Foundation Funds, contact Kate Workman 7-3479;  
For events to be deposited into University funds, please contact Adam Matheson [amathesorn@fau.edu](mailto:amathesorn@fau.edu), and [aftss@fau.edu](mailto:aftss@fau.edu).

This worksheet should be turned in to the Foundation **prior** to the Event and no later than the first deposit for the Event.

Name of Event: \_\_\_\_\_

Fund Name \_\_\_\_\_ Fund Number: \_\_\_\_\_

Date of Event \_\_\_\_\_ Location \_\_\_\_\_

Event Contact Person \_\_\_\_\_

Phone: \_\_\_\_\_ e-mail: \_\_\_\_\_

Approved by \_\_\_\_\_

FAU Foundation

**When a donor receives a benefit as result of making a contribution to FAUF, the FAUF must inform the donor that s/he may deduct only the amount of the contribution that is greater than the value of the benefit(s) received. The price of goods and services should be included in the solicitation material and on tickets.**

To determine the tax deductible (gift) amount - if any  various levels (see attached)

Price of membership level/ticket/table/Sponsorship package etc. \$ \_\_\_\_\_

Registration fee \$ \_\_\_\_\_

The following expenses are subtracted from the registration fee to determine contribution amount:

- Cost of Meals (taxes included) \$ \_\_\_\_\_
- Cost of Benefit items with cost of \$8.60+(gift items, tickets, golf fees, etc.) \$ \_\_\_\_\_

For Sponsorships, the following Substantial Benefits negate any gift value:

- Cost of Advertisements: messages containing qualitative info, price Information, comparative info, etc. \$ \_\_\_\_\_
- Cost of Exclusive Sponsorships (limits sale, use competing products) \$ \_\_\_\_\_

Contribution amount, (if any) = \$ \_\_\_\_\_

or  
 Contribution = 100%

Refunds allowed? Yes  No  Partial

If partial, how much should be held back? \_\_\_\_\_

If yes, is there a date when refunds should be refused? \_\_\_\_\_

*Please be sure to include your refund policy on the website and any ticket or solicitation materials.*

At the end of your Event, please submit an event spread sheet with revenue and expenses.