

WesternU Student Fundraising Checklist

- Fundraising efforts should begin on campus; refer to the [Fundraising Guidelines \(PPT\)](#) for tips.
- Consider [Student Government Association](#) and [Alumni Affairs](#) for financial assistance.

If fundraising off-campus:

Develop a fundraising plan and allow yourself plenty of time:

- Amounts and/or items to be requested
- List of potential donors and collect accurate contact information
- Timeline for solicitations (how & when contact will be made, acknowledgements, etc.)
- Name of student liaison to interact with the Offices of University Annual Giving and/or Student Affairs
- *Use of WesternU Tax ID#:

Eligible: | 1) Professional Guest Speaker Events (attendees food excluded) 2) Health Screening/Immunization Events

Not eligible: | Third party fundraising, Banquets/Fun Trips, Non Health-Related Community Service Events, Conference Travel Expenses etc.

<p>If requesting funds from CORPORATE offices:</p> <p><input type="checkbox"/> E-mail the Director of Annual Giving at least two weeks before you plan to begin soliciting with your:</p> <ul style="list-style-type: none"> • College • List of organizations you plan to solicit • Reason for soliciting • Amount you plan to request • Fundraising timeframe • If unsure, ask if you are eligible to use the *WesternU Tax ID# <p><input type="checkbox"/> Once the Director of Annual Giving has approved your list of organizations, create your solicitation letter/e-mail/postcard/phone script</p> <ul style="list-style-type: none"> • See sample Ask Letter <p><input type="checkbox"/> Make a copy of check(s) for your files</p> <p><input type="checkbox"/> Deposits:</p> <ul style="list-style-type: none"> • If approved to use WesternU Tax ID#: Send Donation Acknowledgement Form and check to University Student Affairs- USA will inter-office to the Office of Annual Giving. <i>A gift receipt/thank you will be sent to the donor on your behalf.</i> • If NOT approved to use WesternU Tax ID#: Make deposit at Bursar's Office using Deposit Form <p><input type="checkbox"/> Send a thank you letter to your donor (include the amount given and how the funds will be used).</p> <ul style="list-style-type: none"> • See sample Thank You Letter • Optional: Send letter to Student Affairs for printing on WesternU letterhead. 	<p>If requesting funds from LOCAL businesses:</p> <p><input type="checkbox"/> Create your solicitation letter/e-mail/postcard/phone script</p> <ul style="list-style-type: none"> • See sample Ask Letter <p><input type="checkbox"/> If unsure, e-mail Annual Giving to determine if you are eligible to use the *WesternU Tax ID#</p> <p><input type="checkbox"/> Make a copy of check(s) for your files</p> <p><input type="checkbox"/> Deposits</p> <ul style="list-style-type: none"> • If approved to use WesternU Tax ID#: Send Donation Acknowledgement Form and check to University Student Affairs- USA will inter-office to Annual Giving. <i>A gift receipt/thank you will be sent to the donor on your behalf.</i> • If NOT approved to use WesternU Tax ID#: Make deposit at Bursar's Office using Deposit Form <p><input type="checkbox"/> Send a thank you letter to your donor (include the amount given and how the funds will be used).</p> <ul style="list-style-type: none"> • See sample Thank You Letter • Optional: Send letter to Student Affairs for printing on WesternU letterhead.
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