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.

If requesting funds from CORPORATE offices:

- E-mail Susan Terrazas at least two weeks before you plan to begin soliciting with your:
  - 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#

- Once Susan has approved your list of organizations, create your solicitation letter/e-mail/postcard/phone script
  - See sample Ask Letter

- Make a copy of check(s) for your files

- Deposits:
  - If approved to use WesternU Tax ID#:
    Send Donation Acknowledgement Form and check to University Student Affairs- USA will inter-office to Susan Terrazas. A gift receipt/thank you will be sent to the donor on your behalf.
  - If NOT approved to use WesternU Tax ID#:
    Make deposit at Bursar’s Office using Deposit Form

- Send a thank you letter to your donor (include the amount given and how the funds will be used).
  - See sample Thank You Letter
  - Optional: Send letter to Christy/Mirabelle for printing on WesternU letterhead.

If requesting funds from LOCAL businesses:

- Create your solicitation letter/e-mail/postcard/phone script
  - See sample Ask Letter

- If unsure, e-mail Susan Terrazas to determine if you are eligible to use the WesternU Tax ID#

- Make a copy of check(s) for your files

- Deposits:
  - If approved to use WesternU Tax ID#:
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- Send a thank you letter to your donor (include the amount given and how the funds will be used).
  - See sample Thank You Letter
  - Optional: Send letter to Christy/Mirabelle for printing on WesternU letterhead.

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<thead>
<tr>
<th>Susan Terrazas</th>
<th>Christy Ho</th>
<th>Dr. Mirabelle Fernandes-Paul</th>
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<tbody>
<tr>
<td><a href="mailto:sterrazas@westernu.edu">sterrazas@westernu.edu</a></td>
<td><a href="mailto:hoc@westernu.edu">hoc@westernu.edu</a></td>
<td><a href="mailto:mfernandespaul@westernu.edu">mfernandespaul@westernu.edu</a></td>
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<tr>
<td>Director of Annual Giving</td>
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<td>Office of Annual Giving</td>
<td>Office of University Student Affairs</td>
<td>COMP-Northwest Student Affairs</td>
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<tr>
<td>309 East 2nd Street</td>
<td>309 East 2nd Street</td>
<td>200 Mullins Dr.</td>
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<tr>
<td>Pomona, CA  91766</td>
<td>Pomona, CA  91766</td>
<td>Lebanon, OR  97355</td>
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<td>☎909 706-3476</td>
<td>☎909 469-5616</td>
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