

Student Fundraising Checklist



Things to consider when preparing to request funds from external organizations. Remember, you must submit a [Student Fundraising Request Form](#) **no less than two weeks** before solicitations are scheduled to begin.

- _____ Develop a fundraising plan including:
 - 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 Office of University Annual Giving

- _____ Draft a solicitation letter/e-mail/postcard/phone script and acknowledgement letter. Be sure to include information about your organization or project and why a donor's support is important.

- _____ Complete a [Fundraising Request Form](#). Obtain the Club/Organization Advisor or College Student Affairs Professional signature before taking this form to Susan Terrazas (see next item).

- _____ Schedule a meeting (phone or in person) with [Susan Terrazas](#). Complete your [Fundraising Request Form](#) (with exception of 2nd & 3rd signatures), fundraising plan, solicitation & acknowledgement letters as well as any additional materials prior to the meeting.

- _____ When gifts are received:
 - Use the [Gift In Kind Form](#) to document products or services given to your club/organization/class at no charge. Return forms to the Office of University Annual Giving.
 - Make a copy of check(s) for your files. Note the date you brought the check(s) for processing.
 - Bring/mail checks and any correspondence to the Office of University Annual Giving for processing. An official University receipt will be mailed directly to your donor.
 - Include your club/organization/class's account number for deposit. If you do not have this number, SGA Executive Treasurer, can provide you with this information.

- _____ Send an acknowledgement letter to your donor including the amount given and how the funds were used

- _____ Provide [Susan Terrazas](#) with a final report on the solicitation list. Please note gift amounts and declined requests for each group solicited.

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