

# 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#:

<b>Eligible:</b>	1) Professional Guest Speaker Events (attendees food excluded) 2) Health Screening/Immunization Events
<b>Not eligible:</b>	Third party fundraising, Banquets/Fun Trips, Non Health-Related Community Service Events, Conference Travel Expenses etc.

### If requesting funds from **CORPORATE** offices:

☐ E-mail the Director of Annual Giving **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 the Director of Annual Giving 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 the Office of Annual Giving. *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 Student Affairs 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 Annual Giving 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#: Send [Donation Acknowledgement Form](#) and check to University Student Affairs- USA will inter-office to Annual Giving. *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 Student Affairs for printing on WesternU letterhead.

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#### University Student Affairs

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