

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 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 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 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 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#: 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.

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