Agenda

- Contacts
- Alumni Affairs – Funding & Resources
- Your “competition”
- Fundraising Ideas & Strategies
- Tips for Approaching Businesses – vs- Corporations
- Use of WesternU’s Tax ID# 
- Advertising your event
- Reservations and Food Permit
- Treasurer & Account Information
University Student Affairs (USA)
Student Services Center #101
Hours: Mon-Thu 7:30 a.m. to 5:00 p.m. & Fri Noon to 5:00 p.m.

Beverly Guidry, EdD
VP for Enrollment Management & University Student Affairs

Christy Ho, MS
Director

Jessica Kersey
Assistant Director

Alana Garcia
Executive Assistant

Jessi Newell
Associate

Jared Greene
Assistant

VACANT
Assistant
COMP-Northwest Student Affairs

Dr. Mirabelle Fernandes Paul
Assistant Dean of Student Affairs

Maryam Hubbard
OSA Coordinator
University Advancement Office

Susan Terrazas  
Director of Annual Giving

Courtney Schultz  
Assistant Director of Annual Giving

Nathaniel Lastrapes  
Annual Giving Engagement Manager
Alumni Affairs

Funding from the Alumni Association
The WesternU Alumni Association’s Student Activity Fund provides financial support to clubs and classes that meet at least one of the following criteria:
• Build a sense of community among students
• Enhance the student experience outside the classroom
• Facilitate student-alumni interaction

WesternU Connect
• [https://westernuconnect.com/](https://westernuconnect.com/)
Number of Clubs

Pomona & Lebanon

<table>
<thead>
<tr>
<th>Year</th>
<th>Number of Clubs</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007-2008</td>
<td>72</td>
</tr>
<tr>
<td>2008-2009</td>
<td>78</td>
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<td>2009-2010</td>
<td>79</td>
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<td>2010-2011</td>
<td>88</td>
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<td>2011-2012</td>
<td>98</td>
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<td>2012-2013</td>
<td>98</td>
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<tr>
<td>2013-2014</td>
<td>108</td>
</tr>
<tr>
<td>2014-2015</td>
<td>114</td>
</tr>
<tr>
<td>2015-2016</td>
<td>122</td>
</tr>
<tr>
<td>2016-2017</td>
<td>126</td>
</tr>
<tr>
<td>2017-2018</td>
<td>139</td>
</tr>
</tbody>
</table>
Number of clubs by program
2017-2018
112 Clubs in Pomona | 27 Clubs in Lebanon = 139 Total

- CAHP: 2%
- CGN: 2%
- CPM: 4%
- COP: 5%
- CDM: 6%
- COMP: 7%
- CO: 8%
- COMP-NW: 19%
- CVM: 15%
- Shared: 32%

68% College Specific
WesternU SGA
24 on-campus classes

- DO 2021
- DO 2020
- DO-NW 2021
- DO-NW 2020
- DPT 2020
- DPT 2019
- PA 2019
- MSHS
- PharmD 2021
- PharmD 2020
- MSN-E 2020
- DVM 2021
- DVM 2020
- DMD 2021
- DMD 2020
- DMD 2019
- DMD 2018
- OD 2021
- OD 2020
- OD 2019
- DPM 2021
- DPM 2020
- MSMS 2018
- MSBS
How to Fundraise
Work smarter, not harder.

First:
Consult the club annual report from 2017-2018
or
Talk to your upperclassmen/predecessors for ideas!
There is a Checklist!

http://www.westernu.edu/bin/students/student-fundraising-checklist.pdf
Fundraising Ideas

- Sporting Event Competition
- Trivia Face-Off
- Help Students Move In/Out
- BBQ (Partner with Outtakes)
- Food Sales (Food Permit Required)
- Bake Sales
  - *spice it up by connecting it to a holiday*
  - *deliver purchases*
- Bachelor/Bachelorette/Butler Auction
- Mario Kart Competition
- Bid for Your Dinner
- Board Game Tournament
- Break The Balloon
- Christmas Tree Ornament Sale
- Dog Wash
- Drive-In Movie

www.fundraiserinsight.org/ideas
www.fundraising-ideas.org/DIY
www.fundraiserhelp.com/fundraiser-ideas.htm

*Casino fundraisers and organized 5k runs are not recommended*
Fundraising Ideas - Merchandise

Partner with the Bookstore!

The bookstore is an authorized retailer with many manufacturers. They may be able to get you a better deal! Email bookstore@westernu.edu for a quote on purchasing merchandise in bulk.
Fundraising Ideas - Merchandise

Approval required for all designs!

The bookstore is an authorized retailer with many manufacturers. They may be able to get you a better deal! Email bookstore@westernu.edu for a quote on purchasing merchandise in bulk.
Branding Standards

- UNIVERSITY NAME

"WesternU" and "Western University of Health Sciences" are the ONLY acceptable usages of the University's name.

- APPROVED FONTS

The University name must be written in Baskerville ITC. If unavailable, Baskerville Old Face and Times New Roman are acceptable.

- UNIVERSITY COLORS

The University colors are burgundy and white.

- ACCENT COLORS

The University accent colors are black, gold and grey.

Resource: http://www.westernu.edu/students/logos/
Fundraising Strategies

- Start fundraising on-campus first!
- Ask club and/or class members for support
- Approach local restaurants and small businesses
- Alumni Affairs
  - See USA Homepages: www.westernu.edu/students/ or http://www.westernu.edu/students-or/
- Approach corporations with the Office of Annual Giving’s permission
- Student Government Association (requests for class banquets or class gifts not eligible)
- Clubs only: Collaborate with other clubs (may be eligible for funding – average of $100)
Fundraising Strategies

- Give reasons why companies should donate
- Be specific in your donation request
  - Example: Donation of 200 cupcakes for bake sale
- Offer business visibility
  - Signage
  - Business name on flyers
  - Name recognition the day of the event
- Request that the donation be given from the marketing budget
- Follow up!!
- Build relationships
  - Business might be more willing to give again next time
- Thank the business for their donation
  - Letter of acknowledgement from club president, faculty member or club advisor
Approaching Businesses -vs- Corporations

University Advancement
Steps For Approaching Businesses

1) **Review WesternU Fundraising Checklist**
2) **Create your solicitation letter/e-mail/postcard/phone script**
   - Send to COMP-Northwest student affairs or University student affairs to have printed on letterhead
   - Sample ask letter available on Fundraising Checklist
3) **If unsure about whether or not you will be eligible to use the WesternU Tax ID#, e-mail Ms. Susan Terrazas (sterrazas@westernu.edu)**
4) **Approach businesses & receive donations**
5) **If approved to use WesternU Tax ID#:**
   - Send Donation Acknowledgement Form and check to University Student Affairs
6) **If not approved to use WesternU Tax ID#:**
   - Make deposit at Bursar’s Office/COMP-Northwest OSA
7) **Send a thank you letter to your donor (include the amount given and how the funds will be used).**
Steps For Approaching Corporations

1) Review WesternU Student Fundraising Checklist ([USA Forms Page](#))
2) Email Susan Terrazas (sterrazas@westernu.edu) with details of your effort including a list of organizations that you plan to solicit
3) Once your list has been approved and use of Tax ID# has been determined, approach corporations & receive donations
4) If approved to use WesternU Tax ID#:
   - Deposit monetary donations and Donation Acknowledgment Form to the Office of University Student Affairs or COMP-Northwest Student Affairs
5) University Advancement will send a gift receipt/thank you directly to the donor(s)
6) If not approved to use WesternU Tax ID#:
   - Make deposit via Bursar’s Office
   - Club/Class should send a thank you card to donor(s)
Use of a Tax ID#’s

■ Tax ID from WesternU
  - *Professional Guest Speaker Events (Not food for attendees)*
  - *Health Screening/Immunization Type Events*

■ Not Eligible for Use of WesternU’s Tax ID
  - *Third party benefiting/supporting*
  - *Class/Club Banquets/Fun Trips*
  - *Non Health-Related Community Service Events*
  - *Professional Conference Travel Expenses*

■ Tax ID from External Organization
  - *When raising money for an external organization you should request use of their tax ID number. Do not deposit these funds into class/club accounts!***
Requesting Your Own Tax ID#

- Tax ID for a WesternU Club
  - NOT recommended
  - Requires your personal SS# and $2000
  - Holds you personally accountable for filing of tax returns and other government documents.
  - Tax ID number not enough to receive donations
    - After apply, you may incur significant cost to qualify your club as a “tax exempt organization” in order to legally receive tax-deductible donations.
  - No association with WesternU in name/address etc.
Advertising Your Event

University Student Affairs
Monday Mail

- Weekly email to WesternU On-Campus Students, Faculty & Staff
- Replaced all campus-wide emails
- Monday Mail submissions are due the Thursday before at 12 pm
- Less emails in your inbox!
- Still have the right to email individual classes for program-specific events

■ You will still have to email studentaffairs@westernu.edu with your request for flyer approval – just clarify that the event is program-specific
Monday Mail Tips

■ Submit your event on time!
  - Ex: Submit Thursday, 2/23/17 by 12 pm to be featured on the Monday, 2/29 edition

■ The EVENT DATE you input on the Monday Mail form will dictate when your event is published
  - Ex: Your event is May 4th, you input May 4th on the form, your event will show up the week of May 2nd

■ If you want to advertise your event multiple times, you must submit the event to Monday Mail multiple times
  - Ex: Your event is May 4th, you can submit this event for the weeks of April 4th, April 11th, April 18th, April 25th, and May 2nd
  - Tip: For early advertisement of your event, you can edit the description as “Reminder! Sign up for XYZ Event on May 4th now for early registration! http:shortgoogleurl”
  - Or: “Calling all volunteers for XYZ Event on May 4th, Sign up online http:shortgoogleurl”
Monday Mail @ WesternU

Monday February 22, 2016

Wellness Club
Come to page with us at 5:15pm in the Otolab (2nd floor HHG). Classes are free. Bring a mat but we have extras if you need one.

Update of Housing Practices

Tuesday February 23, 2016

Kappa Phi Pharmaceutical Fraternity
Crafting Fun! Kappa Phi has got your back! Meet us in front of HMC and grab 7 tasks, shop & a drink for only $5!

Physical Therapy Alumni Club

Wednesday February 24, 2016

PHI Chi 2016
Silent disco & Drink Sale! Outside HRC 11-1 PM. Enjoy a refreshing Soda (with Tea), Thirsty Thursdays for $3 and Iced Coffee for $1!

Ann: Medical Women's Assoc./OSU Club

Ann: Asian Student Outreach
Getting out! Silent disco & Drink Sale! Selling cookies in the HIC co-op at 11-1 PM! For the AAUP Girl Scout Troop!

Thursday February 25, 2016

Physical Therapy Alumni Club
The Yogini Warm-up is TUESDAY! 5pm open at 4pm at HRC. Amp it UP! Come see THE FUNK! http://www.westernu.com/yapic

Ann: Update of Housing Practices
Flyer Branding Standards

- Only use approved WesternU Logos (send to studentaffairs@westernu.edu for approval) – approval good for one year
- Use the University’s name properly (and in the correct font)
- Do you have permission to use an affiliate’s name/brand (e.g. Target)
- ALL flyers must be approved – send to studentaffairs@westernu.edu
- Don’t attach, embed the image in the e-mail.

Event Advertising Guide on USA Forms page.
Reserving a Space and the Food Permit Policy
You must reserve space!

- Club Presidents must reserve the space through University Student Affairs
  - Requests must be made 10 days in advance
- Class Officers must reserve the space through your college’s Student Affairs office
- Your request involves multiple departments so think through your event BEFORE your event is booked
- Don’t advertise until your space is confirmed
Whenever student groups are serving food on campus (EVEN FREE FOOD), you must apply for a Food Permit.
Details

■ **Who:** Any student group on campus that is SERVING food. This includes FREE food on campus.

■ **What:** *Class Officers* must complete a [food permit approval form](https://webapp.westernu.edu/food_policy/home)
  - *Club Officers:* *This request is made in your event reservation form.*

■ **When:** At least 10 days before your event – the earlier, the better

■ **Where:** [https://webapp.westernu.edu/food_policy/home](https://webapp.westernu.edu/food_policy/home)

■ **How:** Once your request has been submitted, you will receive an automated email with the subject line, “Student Food Policy.” You will receive automated emails regarding the approval/denial of your request. If your request is denied, please email [studentaffairs@westernu.edu](mailto:studentaffairs@westernu.edu) for further instructions.
Summary

1) Start planning early
2) Involve your advisor and/or college
3) University’s tax ID# has limitations
4) Don’t apply for a tax ID#
5) Know the branding standards
6) All space must be reserved
7) Serve food? Need permit.
Question?

USA in Pomona
studentaffairs@westernu.edu

OSA in Lebanon
studentaffairsOR@westernu.edu

Alumni Affairs
AA@westernu.edu

Director, University Advancement
Ms. Susan Terrazas
sterrazas@westernu.edu
TREASURER DUTIES

Training provided by University Student Affairs
How to: find your forms

No alcohol purchases will be reimbursed

<table>
<thead>
<tr>
<th>Student-Led Events</th>
<th>Financial</th>
<th>Resources and Forms</th>
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<tbody>
<tr>
<td>Reserving &amp; Advertising</td>
<td>Financial Affairs</td>
<td>Officer &amp; Club Application</td>
</tr>
<tr>
<td>Club Events Calendar</td>
<td>Fundraising</td>
<td>Class: Officer Responsibilities</td>
</tr>
<tr>
<td>Club Room Reservation Form</td>
<td>Mandatory Fundraising Checklist</td>
<td>Executive: Officer Responsibilities</td>
</tr>
<tr>
<td>Event Advertising</td>
<td></td>
<td>New Club Application</td>
</tr>
<tr>
<td>Food Permit (Glass Only)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Food Safety Training</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Inserting a PDF into an e-mail</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Monday Mail</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Request to Serve Alcoholic Beverages on Campus</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Health Screenings | |
|-------------------||
| Approval Form ||
| Oversight Guide ||
| Promote Community Resources ||

| Connect with SGA | |
|------------------||

**Fundraising**
- Fundraising Guidelines
- Mandatory Fundraising Checklist

**Financial Affairs**
- Banner: Viewing your FUND
- Deposit Form
- Student Reimbursement Form
- Treasurer Training
- W-9 Form

**Request Funding From**
- Alumni Association
- Alumni Assoc. (Post Event)
- Student Government Association
- SGA: "Collaborative Club Event"

**Reference Documents**
- Biohazardous Waste Policy
- Image Release Form: English
- Image Release Form: Spanish
- SGA Bylaws
- SGA Constitution
How to: reimbursement form

No alcohol purchases will be reimbursed!
How to: reimbursement form Cont.

Lunch & Learn Food Supplies

$100.00

Steven Student

Sharon Student

3/10/17
How To: Request payment

- **Paying a Vendor Directly**
  - Complete the Student Reimbursement Form
  - Attach an itemized invoice or contract that indicates the amount that will need to be paid and by when
  - A check will be cut directly to the vendor
  - **New vendors and speakers need to submit a W9 Form**

- **Pay Out Of Pocket & Be Reimbursed**
  - Use your personal credit card or checkbook to pay
  - Obtain an **itemized receipt**
  - Complete Student Reimbursement Form & attach receipt
  - The amount will be direct deposited to your bank account
How To: Get Your Money

Reimbursement checks & direct deposits take one to two weeks to process so plan accordingly!

– Checks
  ■ Cut on Fridays ONLY, after 2 pm
  ■ Email will be sent to you when ready for pick up at University Student Affairs (Pomona) or COMP-Northwest Student Affairs (Lebanon)
  ■ Bring your student ID to pick up

– Direct Deposit
  ■ Electronic Fund Transfer email
How To: Delay Your Money

- Missing Receipts
- Receipt missing details of purchase
  - *Not itemized*
- Missing Logo approval e-mail
- Form not signed
- Missing Student Travel Notification form
- Missing w-9 (if required)
- Student signed the contract with vendor
- Missing a Class Vote (only for SGA/Class)
How To: Reimburse Travel

- **Pre-Travel:** Fill out “Student Travel Notification Form”
  - Two **weeks** prior to departure
  - Good academic standing
  - Required to get reimbursed

- **During Travel:** Keep ALL original itemized receipts

- **Post-Travel:** Submit Student Reimbursement Form
  - Mileage (Federal rate)
  - Food: $12/breakfast $18/lunch $36/dinner
How To: Sign Contracts

- *Just kidding!* Don’t sign contracts!! Your college administration is not allowed to sign contracts. The University is going through some procedural changes that currently only allows a few individuals on campus to sign on behalf of the university: Dr. Wilson (President), Dr. Gugelchuk (Provost/COO), Kevin Shaw (CFO), and Dr. Guidry (VP of Student Affairs)
  - Dr. Guidry is allowed to sign on behalf of clubs.
    - Contact Christy Ho for any questions regarding contracts.
How To: Deposit Money

Date: 3/10/17
Subject: Deposit Summary

<table>
<thead>
<tr>
<th>Club/Class Fund#</th>
<th>Org</th>
<th>Account</th>
<th>Program</th>
<th>Amount of Checks/Cash</th>
<th>Description</th>
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<tbody>
<tr>
<td>1234</td>
<td>4899</td>
<td>70099</td>
<td>40</td>
<td>$100</td>
<td>Check, donation</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$100</td>
<td>Check, donation</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$200</td>
<td>Cash, boba fundraiser</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Total $400</td>
<td></td>
</tr>
</tbody>
</table>

Total number of checks for deposit – DO NOT INCLUDE AMOUNT
Total amount of cash for deposit – INCLUDE AMOUNT

All deposits must be verified at the Bursar’s Office and you must wait for a receipt.
How To: Retrieve an Account Balance

- View account balance on Banweb
  - Only treasurers have access
  - Watch for an e-mail with instructions

- Student Affairs
  - Pomona - University Student Affairs
    - Jared Greene
  - Lebanon – COMP-Northwest Student Affairs
    - Maryam Hubbard
How To: Read Your Statement

Budget Queries

For a Budget Query to be successful, a user with Fund Organization query access must enter a value in either the Organization or Grant fields as well as the Fiscal Year, Period, and Chart of Accounts fields. If Grant information is queried, all retrieved information is Grant Inception to Date. Otherwise, all information retrieved is through the Fiscal Year to Date.

To perform a comparison query select a Comparison Fiscal Year and Period in addition to the required Fiscal Year and Period. With this selection, all details retrieved will be placed next to the corresponding comparison fiscal period.

<table>
<thead>
<tr>
<th>Fiscal year:</th>
<th>2017</th>
<th>Fiscal period:</th>
<th>14</th>
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<tbody>
<tr>
<td>Comparison Fiscal year:</td>
<td>None</td>
<td>Comparison Fiscal period:</td>
<td>None</td>
</tr>
<tr>
<td>Commitment Type:</td>
<td>All</td>
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<tr>
<td>Chart of Accounts</td>
<td>W</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fund</td>
<td>1234</td>
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<td></td>
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<tr>
<td>Organization</td>
<td>4099</td>
<td></td>
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</tr>
<tr>
<td>Grant</td>
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</tr>
<tr>
<td>Account</td>
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<tr>
<td>Program</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Include Revenue Accounts</td>
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<td>Save Query as:</td>
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<td>Shared</td>
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</tr>
<tr>
<td>Submit Query</td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>
### How To: Read Your Statement Cont.

**Period Ending Jun 30, 2014**

**As of Feb 21, 2014**

- Chart of Accounts: Western University of Health Sciences
- Commitment Type: All
- Fund: [Redacted]
- Program: [Redacted]
- Organization: [Redacted]
- Activity: All
- Account: 70850 Miscellaneous
- Location: All

<table>
<thead>
<tr>
<th>Transaction Date</th>
<th>Activity Date</th>
<th>Document Code</th>
<th>Vendor/Transaction Description</th>
<th>Amount</th>
<th>Rule Class Code</th>
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<tbody>
<tr>
<td>Jan 10, 2014</td>
<td>Jan 10, 2014</td>
<td>W0464020</td>
<td>American Student Dental Association</td>
<td>(450.00)</td>
<td>CNNI</td>
</tr>
<tr>
<td>Dec 05, 2013</td>
<td>Dec 05, 2013</td>
<td>W0440623</td>
<td>[Redacted]</td>
<td>(90.00)</td>
<td>CNNI</td>
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<tr>
<td>Jan 31, 2014</td>
<td>Jan 31, 2014</td>
<td>J0048053</td>
<td>Tsfr to 3108 portion of CSHP seminar</td>
<td>450.00</td>
<td>JE16</td>
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<tr>
<td>Jan 30, 2014</td>
<td>Jan 31, 2014</td>
<td>J0048038</td>
<td>Tsfr for Palomares Day</td>
<td>400.00</td>
<td>JE16</td>
</tr>
</tbody>
</table>
# Organization Budget Status Report

## By Account

<table>
<thead>
<tr>
<th>Fund</th>
<th>Commitment Type</th>
<th>Organization</th>
<th>Account</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Program</td>
<td>4099 Student Accounts</td>
<td>All</td>
</tr>
<tr>
<td></td>
<td>Activity</td>
<td>Location</td>
<td>All</td>
</tr>
</tbody>
</table>

**Period Ending Jun 30, 2014**

**As of Feb 21, 2014**
## Query Results

<table>
<thead>
<tr>
<th>Account</th>
<th>Account Title</th>
<th>FY14/PD14 Available Balance</th>
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</thead>
<tbody>
<tr>
<td>70850</td>
<td>Miscellaneous</td>
<td>(527.93)</td>
</tr>
<tr>
<td>70899</td>
<td>Clearing</td>
<td>1,998.59</td>
</tr>
<tr>
<td>Report Total (of all records)</td>
<td></td>
<td>1,470.66</td>
</tr>
</tbody>
</table>
Treasurer Reminders

- We are almost done, I promise!

- Do not comingle funds!
  - If you are fundraising for a third party (Susan G. Komen), do not deposit those funds in your account.

- Do not create off-campus bank accounts!

- At the end of your term, you are responsible for the COF paperwork that states the fund is in good order
Questions for University Student Affairs?

USA in Pomona

studentaffairs@westernu.edu

OSA in Lebanon

studentaffairsor@westernu.edu