

University of Western States Student Club Fundraising Handbook

Student clubs are a very important part of the university experience for so many students here at UWS. Thank you so much for all you do to keep our community engaged, fulfilled, and connected.

While UWS provides some funding for club activities, you most likely will have to do some fundraising on your own to provide for special initiatives.

We want you to be successful in your efforts. There is more to student club fundraising than meets the eye and the UWS Development office is here to help you.

Let's Get Started

All student fundraising efforts need to be coordinated with the UWS development office.

If your club is planning to:

- Ask anyone for donations in the form of money, services, or items
- Hold a ticketed event
- Participate in any third-party fundraising activity that will benefit your club

Then you need to:

1. Get approval from your club or faculty/staff sponsor
2. Send a brief overview of your fundraising purpose and goals to the alumni relations team (Erika Stanley and Julie Stutzman) and the development office (Kelli Rule) to alumnirelations@uws.edu. This will begin the conversation that will lead to fundraising/promotional approval and guidance.

We may ask to meet to discuss your plans more thoroughly. When we meet, we will discuss:

- Who you plan to ask for donations

- How/when you plan to ask them (mail, email, phone, in person, etc.)
- How you will promote your fundraiser
- How you will collect the donations and what they will be used for
- How you will thank your donors

Some basic info to help you plan

1. Asking for donations

After your fundraising plan has been approved, you can start fundraising. Still, there are guidelines.

The following must be cleared with the development office before approaching for donations:

- All non-retail businesses (doctors, travel agents, accounting firms, etc.)
- Major corporations (REI, Costco, airlines, etc.)
- Foundations
- Banks
- UWS faculty, alumni, or student body at large (You are welcome to accept donations from these folks, you just cannot personally ask until you coordinate with the development office.)

The following organizations/groups can be asked to participate without prior approval from the development office:

- Parents and friends of club members
- People who attend your fundraising event
- Current members of your club
- Companies who donate small items as part of their in-store management discretionary budget (some bagels or donuts, a carafe of coffee, a grocery store gift card, etc.) You must approach the store manager, not the store's corporate headquarters.

If you are ever uncertain about approaching a donor or if you think you might need help, please contact the development office.

2. How to ask for donations

You can ask for donations by email, through online fundraising platforms, (like GoFundMe) face-to-face, with a donation box or bucket at an event, or by mail. It's up to you to decide which method, or which mix of methods, is most appropriate.

Before you do, please know that fundraising materials and language for solicitations must be reviewed by the development office, and for branding by UWS communications department. **Two weeks is the minimum turnaround time for approval.**

The development office will help you in your efforts. For instance, we can assist by helping you plan a timeline to schedule your "asks", providing you with logos or university letterhead templates, and even accompanying you on face-to-face meetings with big potential donors.

We can also provide donation forms and remit devices, business reply envelopes, editing help...anything you need to help you be successful.

3. How to promote your fundraising campaign or event

There are so many ways to promote your fundraiser, and UWS would love to help.

Like your solicitation materials, your promotional materials (posters, ads, flyers, etc.) must be reviewed for branding by UWS communications department. In most cases, your club will be responsible for the cost of printing these materials.

Depending on the nature of your fundraiser, communications can also promote your event on UWS social media platforms. The development office can help by liaising on your behalf.

The alumni relations team can help promote your event to the wider UWS community. Please be mindful of the two week advance notice requirement.

Two weeks is the minimum turnaround time for branding approval and promotional requests.

4. Collecting, managing, and using your donations

When people think “donation”, they often assume that their contribution will be tax-deductible. Indeed, some donations made in support of your club will be totally or partially tax-deductible; however, some may not. Knowing the difference and communicating it to your donors is very important and will influence your gift collecting and management process.

Tax-Deductible Donations:

In order for the donor to rightly claim a deductible benefit on their taxes, the gift must either be made out to UWS (check or money order) or made money and gifts-in-kind with the appropriate form:

[Monetary gift acceptance form](#)

[Gift-In-Kind acceptance form](#)

For a donation to have a tax-deductible value, it must meet these criteria:

1. It must be used by the club in service of UWS’ educational mission.

What does this mean? Your club may not raise funds, for example, a recreational trip to Great Wolf Lodge. Additionally, donations to purely recreational clubs would not be tax-exempt.

2. No individual may personally profit from the funds raised.

What does this mean? In effect, for accounting purposes, this means that John Doe may not put on a club fundraiser, take the money, and use the collected funds to purchase airfare to a chiropractic conference. The funds must first be deposited in the club account, where it is ultimately the club’s decision on how the funds are spent.

Additionally, the donor must either:

- Receive no tangible good/service in exchange for their monetary donation
- Receive a tangible good/service in exchange for their monetary donation that is less than the amount of the monetary gift.

Examples:

A person buys a cupcake at your bake sale for the advertised price, or, the *fair market value* of the cupcake. They cannot claim a tax deduction because the amount they paid is equal to the fair market value of what they received.

A person buys a cupcake at your bake sale for the advertised price and gives you an extra \$10 toward your fundraising effort. They can claim a partial tax deduction because the funds exchanged are more than the fair market value of the cupcake.

A person just gives you money and doesn't want a cupcake. The entirety of the money that the person gives you is tax-deductible, because they received nothing in exchange. We call this an *outright gift*.

A donor may also receive a tax-deduction by providing a good (or, a *gift-in-kind*) for reduced or no payment.

Examples might include: A travel voucher to attend a conference, supplies for an outreach event, food for an educational event sponsored by your club, a gift card to Costco.

Donations of services are not tax-deductible.

How these distinctions will inform your gift management process:

Gifts that have a total or partial tax-deductible value need to be submitted to the development office.

Gifts that have no tax-deductible value do not need to be submitted to the development office. Your club may collect and record and distribute these funds per your club guidelines.

If you are unsure about the tax-deductibility of a gift, contact the development office. We will follow up with you and/or the donor.

What you need to know about this process:

All contributions must be accompanied by the appropriate intake form:

[Monetary gift acceptance form](#)
[Gift-In-Kind acceptance form](#)

Donations must be turned in or mailed to the development office immediately - and no later than 3 business days after you collect them.

Once received by the development office, the funds will be deposited by UWS financial services. To spend the funds, a check request must be submitted. The check request should be coded to the corresponding type of expense (see [expense dictionary on UDocs](#) for list of accounts).

What to do with different types of gifts (check, cash, credit card, in-kind) when you are ready to submit:

What to do with gifts made by check:

For tax-deductible gifts, keep a log of the checks received.

[Monetary gift acceptance form](#)

If the gift is not tax-deductible, you will follow the procedures required by your club Treasurer.

What to do with gifts of cash and coin:

Keep a log of cash received.

[Monetary gift acceptance form](#)

For the donors to receive a tax credit for their cash gift, you must record and submit the donor information. If you are doing a passive collection using a donation box or jar, then the donor(s) will be recorded as “anonymous”. These anonymous gifts will not be tax-deductible.

For tax-deductible gifts, when you have collected and logged all the cash, you will convert it to a money order and submit the money order and the donor information log to the development office.

Any fees associated with the purchase of the money order must be paid for separately by your club.

If the gift is not tax-deductible, you will follow the procedures required by your club treasurer.

What to do with credit card gifts:

For the gift to be tax-deductible, the donation must be made through www.uws.edu/donate, or the donor may use a remit device, which you will turn in to be processed by the development office.

If the gift is made through your personal or external fundraising page (PayPal, GoFundMe, Kickstarter, etc.), then it is not tax-deductible.

What to do with gifts-in-kind (goods, gift certificates, or services):

If the gift is tax-deductible, have the donor complete a [gift-in-kind acceptance form](#). It should be completed before possession of the item is taken.

5. THANKING YOUR DONORS

Making sure that your donors feel thanked is the most important aspect of philanthropy. If your donors feel good about their decision to give to you, they are much more likely to give in the future. This is not only good for you, but good for future UWS students who might want to reach out to these people for gifts.

The UWS development office can supply you with a stock of thank-you cards and envelopes. E-acknowledgments are a great way to say thanks, as well. And nothing beats a phone call.

In addition to thanking, you will want to let your donor know how their gift was used, and the outcome of their support. For example: Did their gift help send a group of interns on a service trip? If so, send your donor a letter with some pictures, a quote from a patient, and a summary of your experience - and tell them again, thank you.

We can provide thank you cards, email templates, proofing and editing help, and more! If you would like further advice on how to put together an effective thanking and recognition effort, please contact us.