

FUNDRAISERS: A CHECKLIST FOR SUCCESS

Before planning and executing a fundraiser, check with your campaign coordinator on your department's policy for handling fundraisers and cash, and make sure you have permission to implement a fundraiser.

1. Choose a fundraiser that makes sense for your group! If you have one in mind, great. If you are looking for a good one, check out the ideas on the UWCFD website: hr.uw.edu/cfd/annual-campaign/coordinator-training-and-resources

2. Plan and market your fundraiser — you can't have a successful party if you don't invite anyone!

3. Plan the payment options you want to have available at the event:

- Giving form
- Cash
- Personal check: Be sure to attach a giving form to employee checks to count toward your agency's participation.

4. Credit card option: Email your campaign assistant at least two weeks in advance. They will need following information:

- Event name
- Team member
- Active dates (give leeway a few days before and after)
- Nonprofit funds benefit
- Fixed dollar amounts, if any

5. Manage the proceeds

- Count any cash with a colleague and record the total on a fundraiser reconciliation form. Initial and date the record.
- Obtain a money order/cashier's check for cash proceeds (if after the campaign ends).
- Complete the fundraiser form. Be sure to sign and date the form. Expenses may not be taken directly from the proceeds of the fundraiser. If seeking reimbursement for expenses, keep any receipts and work with your campaign assistant to get a refund. Refunds CANNOT exceed event expenses.
- Give giving forms, employee checks, money order/cashier's check and/or receipts, along with the fundraiser form, to your campaign assistant within 24 hours.

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A DIFFERENCE



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