

## Fundraising at FORT LEWIS COLLEGE: Overview and Approval Process

1. Complete the proposal form. This allows Institutional Advancement to track the many fundraising efforts on campus, establish any accounts that you need and to help you succeed.
2. Return, via email, the form to Institutional Advancement via [kaschwartz@fortlewis.edu](mailto:kaschwartz@fortlewis.edu). The Advancement staff will review proposals, gather additional information as needed, and make a determination about priorities. The approval process and other fundraising policies are outlined at <https://wiki.fortlewis.edu/display/POL/Coordination+of+Private+Fundraising>
3. Once your proposal is approved you are ready to fundraise.
4. If you plan to individually solicit people or businesses, send potential donor names to [kaschwartz@fortlewis.edu](mailto:kaschwartz@fortlewis.edu) in Institutional Advancement. We often have helpful information about the prospect and can help you identify a good target amount to request from the prospect (asking for the right amount is critical to your success!). Sending a list of prospective donors is great way to develop your own prospect list. If a donor is already giving, or is "off-limits" due to a pending gift, we'll let you know. This can save you encountering a donor who has recently given, and helps protect donors from being over-solicited.

If you plan to mail or email a fundraising request, once your fundraising request is approved, Institutional Advancement will work with you to create a contact list.

5. Should you be in a position to finalize a gift, and have not yet worked with a gift officer, please contact us immediately to ensure that we protect the donor and College.
6. The most important thing is to keep us in the loop. Fort Lewis College is perceived as one entity from the outside, even though we have many programs and projects running at the same time. By working together we can all be more successful.
7. Have any questions? Contact the Institutional Advancement staff at (970)247-7080 or email [kaschwartz@fortlewis.edu](mailto:kaschwartz@fortlewis.edu) and she will make sure the right person responds to you.

### Definitions

**ANNUAL GIVING** - a request for a gift(s) or pledge(s) up to \$10,000, usually generated through a direct mail, telephone, or e-mail appeal on behalf of annual or special projects. This includes annual "membership drives" soliciting donations in support of a program. The Annual Giving program provides Fort Lewis College with financial support for scholarships, special programs, technological improvements and betterment of the overall student experience.

**MAJOR GIFT SOLICITATION** - a request for a gift or pledge of \$10,000 or more through personal contact (whether in person, by phone, by letter, or by email) with a donor or donor prospect.

**CAMPAIGN** - an organized program designed to solicit funds for specific objectives and which includes a target goal.

**FUNDING SOURCE** - an individual (alumnus, parent, faculty/staff member, or friend), foundation (corporate, private, or family), corporation, or organization that might provide private gift and/or grant support to the College.

# FLC Fundraising Proposal Form

Before you start fundraising, please complete this form and return it to Institutional Advancement. If you have any questions please feel free to contact the office at (970)247-7080 or email [kaschwartz@fortlewis.edu](mailto:kaschwartz@fortlewis.edu).

One-off projects will be considered on a case-by-case basis. The Vice President for Institutional Advancement, in concert with FLC leadership and Advancement staff, assign resources and priorities as they align with the FLC Strategic Plan.

Name:

Title:

Department:

Phone:

Email:

Project:

**What is the intent or mission of your project?**

**Is this an on-going or one-time campaign?**

\_\_\_ on-going (multiple segments or continuing drive) Explain:

\_\_\_ one-time (start date: \_\_\_\_\_ end date: \_\_\_\_\_)

**What offices or organizations or offices (on or off-campus) are involved/working on this project?**

**What is your fundraising goal?**

\$ \_\_\_\_\_ per year or \$ \_\_\_\_\_ total

**Who do you expect to solicit (i.e. foundations, alumni, community members, etc.)?**

*Upon approval of the project, we will work with you on providing contact information for mail, electronic or personal solicitation. All lists must be approved by Institutional Advancement/ Advancement Services)*

**Do you anticipate needing design/artwork or other assistance from Marketing & Communications?**

If so, please explain:

**Do you have a fund set up with the Fort Lewis College Foundation?**

<https://www.fortlewis.edu/foundation/Forms.aspx>

\_\_\_ No      \_\_\_ Yes      Name: \_\_\_\_\_

**Do you have a stewardship plan developed to thank and nurture donors? Please attach to this form.**

**Approval for consideration of fundraising project:**

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Signature: Department Head

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Signature: Vice President