

ADDITIONAL INSTRUCTIONS & TIPS

- Please take the time to explain to the employees that pledge forms need to be legible and mathematically accurate. This will ultimately save the CFC office time and money during the data entry process, thus forwarding more money to the CFC-funded charities.
- Be sure that each potential donor gets a pledge form and has access to a CFC charity catalog. You can also find a searchable database of the charity catalog online at heartlandcfc.org.
- Discuss donor options and explain that only charitable agencies in the charity catalog can receive donations through the CFC. Remember, write-ins will not be honored. The code of the charitable agencies designated must be valid and legible, with a maximum of five designations per form. **OPM requires that pledges with incorrect code numbers be treated as undesignated gifts.**
- To release the donor's name to the designee, the proper information must be filled out on the pledge form, including home address of the donor, and the appropriate box checked.
- The auditors ask that you keep all cash or checks with their appropriate pledge forms. Do not separate them or put them in a different envelope.
- Be sure that every employee's form is returned to you, even if they choose not to donate. It is not coercion to ask for the pledge form. Thank every person, even if they do not give.