CAMPAIGN LEADERS/WORKERS: HANDLING PAPER PLEDGES

In campaign year 2017, the paper pledge forms will be handled differently than in previous campaign years. The significant changes include:

- Pledge forms will no longer be serial number "accountable". The only forms that need to be returned are those with donations. Instead of being returned to the local campaign chair, the forms will be mailed directly by the Unit Project Officer (or Agency Project Officer for small agencies) to the Central Campaign Administrator (CCA).
- If donors would prefer that no keyworker or other campaign workers handle their personally identifiable information (PII), they have the option of mailing the completed pledge form directly to the CCA.
- Since the campaign will no longer accept cash, there is no need to deposit anything in a local bank.
- All pledge forms will be processed with shared payroll providers by the CCA – there is no longer a requirement to send a copy of the pledge form to the local payroll office for processing. Payroll deductions, both on-line and using pledge forms, will be processed by the CCA u=with the shared payroll providers.
- The three tiers of a donor's organization (Department/Agency/Office or Unit) are still required on the paper pledge form to appropriately "point" the CCA to the correct payroll provider. These three fields match those in the pull down screens in the on-line giving portal, and it is important that these are entered correctly. The Campaign Chair will provide each Agency and Unit Project Officer with the organizational laydown for each agency. These information is included each year and updated by the "FIND" process, which is done prior to the solicitation period.
- The rest of the pledge form is similar to those of previous years. The only difference is that there are no extra parts or carbonless copies. Donors wishing to keep a copy of their form for their records including tax purposes should make a personal copy, and if desired, mark over the Social Security Number Field.
- There is no longer a local audit whereby all pledge forms are returned to the campaign chair for accountability and audit, and then entered by a commercial data entry firm. However, Unit Project Officers should do a local quality check to ensure that the forms are completed correctly prior to batch mailing them to the CCA, including completing the summary sheet with totals when returning forms.
- Pledge forms discrepancies will be addressed by the CCA via OPM. Providing current donor email addresses is important in case follow up on an individual pledge is required. Individual pledge information is not shared with anyone besides the donor. Campaign workers only got pledge totals for agencies and units – without attribution to individual donors.

The Pledge Form Handling Process for 2017:

(1) Agency Project Officers complete the FIND form for their agency, including the unit structure and employee totals.
(2) The campaign manager will build a pledge form distribution list based on the FIND information and each agency and unit is provided with the appropriate number of Keyworker envelopes and Unit Project Officer Mailer Bundles. Pledge forms are bundled in groups of 25 per Keyworker envelope. Unit Project Officer Mailers are bundled in groups of 12, with a summary sheet and mailing envelope for each week of the campaign. Very large units may receive more than one bundler to allow for larger weekly mailings.
(3) The printed pledge forms, mailing bundles and other campaign materials are shipped direct to Agency Project Officers for distribution of the unit campaign supplies to each unit. Campaign materials can be shipped directly to units if addressed are provided and this is identified during the FIND process.
(4) Every potential donor should be provided a pledge form as part of the “ask”, and the form also has instructions for on-line giving, which is more efficient.
(5) Completed pledge forms are mailed to the CCA by the Unit or Agency Project Officers using the pre-addressed return mail envelopes, documented by a summary sheet. Use of government postage for return envelopes is authorized.
(6) Individual donors can mail their pledge forms directly to the CCA, if desired.
(7) Blank pledge forms do not need to be returned to the CCA. They should be disposed of using appropriate local paper recycling procedures.
(8) Completed pledge forms are considered PII and should be managed appropriately.
(9) For questions regarding pledge form handling, please contact the campaign chair.

Please see the attached sample pledge form, agency print distribution report and pledge form flowchart for more information on the pledge form process.