

## Matching Gift Policies

Matching Gift programs offered by organizations can be a great opportunity to generate additional funds! Please note that there are specific guidelines that both the participant and donating employee must follow in order to be considered for a Matching Gift.

- ❖ A Matching Gift program is usually an organization's incentive to encourage employees to be involved in philanthropic giving. Each organization that offers a Matching Gift program has its own process on how to apply for a Matching Gift and has its own criteria used to determine whether the donation is eligible for a Matching Gift.
- ❖ Most organizations will only consider a Match from their own employees and require a unique application to be completed by each donating employee for each unique donation amount.
- ❖ Once the Matching Gift process has been initiated by the donating employee, TNT requests that the donating employee send a copy of the check or credit card receipt and their company's Verification form directly to the TNT Office. Please do NOT send matching gift forms to PAYCOR. **Note that faxes will not be accepted.** Any deviations from this process may cause delays in processing the Matching Gift request.
- ❖ Please bear in mind that the decision on whether a Match will be granted is solely at the discretion of the donor organization, **not LLS**. Submission of Matching Gift paperwork does not guarantee that the donation will be received immediately, as some companies send matching gift checks quarterly, twice a year, or even once a year. We, at LLS, do our part in complying with the application process in a timely manner, however we have no influence or control when a Match is declined or fund (gift) delays arriving to our organization.
- ❖ **LLS' Soft Credit policy:** A Soft Credit is a **conditional credit** we issue as a courtesy, 2 weeks before the Final Funds deadline, to help reduce a Final Funds charge. LLS will honor Soft Credits up to **25%** of your participation minimum. Soft Credits will be issued only if BOTH of the following criteria are met: (1) the Matching organization has been approved by LLS, and (2) LLS receives the initial donation AND the Matching Gift form from the donor company **2 weeks before the Final Funds deadline**. All other prospective Matching Gifts will remain unaccredited until the actual funds are received by LLS. Bear in mind that a Soft Credit indicates that the funds have not yet arrived. LLS reserves the right to reverse a Soft Credit if a Matching Gift is denied or if the funds do not arrive when specified.
- ❖ **LLS' Matching Gift disbursement policy:** All funds received by a company as a result of a Matching Gift MUST be credited to the same participant's account AND same event as the original donation. There will be NO exceptions to this policy.
- ❖ LLS continues to reserve the right to charge the participant's credit card for any funds that are outstanding when the Final Funds deadline arrives. Please see TNT Policies for Participants for further details.
- ❖ In the event that the donor and/or participant does not comply with a Matching Gift organization's guidelines and LLS must return the funds to the organization, LLS reserves the right to charge the participant's credit card for the amount of the gift accordingly.
- ❖ Again, we urge you to read the Matching Gift organization's guidelines thoroughly before sending in a submission. **We do not support or encourage fundraising in a way that jeopardizes the integrity of the participant, the donor, the Matching Gift organizations or The Leukemia & Lymphoma Society.**

# Matching Gift Processing Instructions

Matching Gift programs offered by many companies and organizations can be a great way to generate additional funds to meet your fundraising goal. Please remember that there are specific guidelines that you **and** the donating employee must follow in order to be considered for a Matching Gift.

This document describes the policies that LLS has established in regards to matching gifts. Please read this carefully and make sure that you understand the policies in regards to disbursement of funds and soft credits.

**IMPORTANT DO NOT** send any Matching Gift verification documents to PAYCOR. This will cause a delay in processing your matching gifts by the fundraising deadline. Only send the original check donation to PAYCOR, and keep a copy of the check for your records.

**In order to effectively process your contributions and to ensure accurate and timely postings to your account, it is important that you closely follow the instructions outlined below.**

## Processing Instructions

### **Step 1: Get Donations**

By Check -. Mail original check to Paycor and make a copy of the check for your records.

By Credit Card/Online- Print a copy of the receipt that is emailed to you from your fundraising account, and save it for your records.

### **Step 2: Company Matching Gift Form (provided by donor's company)**

Have your donor complete their company's matching gift verification form. (Details regarding an organization's Matching Gift program can be found by contacting their human resources department, or employee benefits department.)

Online Form- If the donor's company uses an online verification process such as Easy Match, the donating employee should complete the form and have it sent to the Greater Los Angeles Chapter of LLS. Sending the form to the wrong LLS Chapter will slow down the process.

Paper Form- If the donor's company uses a paper process for verification, the donor employee should complete the form and send the company's verification form to the LLS Greater Los Angeles chapter office.

### **Address for the Greater Los Angeles Chapter Office:**

The Leukemia & Lymphoma Society  
Greater Los Angeles Chapter  
Attn: Matching Gifts  
6033 W. Century Blvd., Suite 300  
Los Angeles, CA 90045

NOTE: Please allow 7-10 business days from the time you mail in your donations to be posted to Paycor. The initial donation will be credited to your fundraising account, but the matching gift portion can take anywhere from 60-180 days for LLS to receive the check; depending on the donor company's policy. Many corporations distribute matching gifts every 60 days, however some limit distribution to quarterly, bi-annually and sometimes once per year. Please check with your donor to determine the waiting and approval period for these gifts.