

May 8, 2017

**MEMORANDUM OF POLICY**

**RE: Refunds to donors**

This statement discloses the policy drafted by the Washington State Combined Fund Drive (CFD) on issuing refunds to CFD donors.

One of the strengths of the CFD is to provide the best possible customer service to all CFD stakeholders and address their needs in a timely manner.

**Definitions:**

Refunds are issued to donors on the following basis:

- **Reasonable request from the donor:** A donor may request a refund regarding unauthorized deductions from their paycheck or a mistake made regarding a pledge and subsequent donation. Refund requests must be made in a timely manner within the open quarter.
- **Charity closures and lack of response:** When a charity notifies the CFD of a closure or does not remedy a closed status at the OSOS Charities Division, CFD staff notify all donors giving to the closed charity (following procedures set forth in the policy regarding [Donations made to closed, delinquent or merged charities](#)). If donors do not respond to contact within 30 days, the CFD cancels the donation, zeroes out all received funds during an open disbursement quarter in the CFD Reconciliation Module and submits a refund to the OSOS Financial Services Division to process and send to the donor.

**Regarding the University of Washington Combined Fund Drive:**

The University of Washington Combined Fund Drive (UWCFD) participates in an annual contract with the CFD state office that allows UWCFD staff to communicate with donors directly. As a result of this agreement, refunds are handled through the following procedure:

- **Reasonable request from the donor:** Donors contact the UWCFD regarding any reasonable refund requests and the refund is processed by UWCFD staff through the UW payroll system.
- **Charity closures and lack of response:** The CFD state office contacts the UWCFD with a list of donors who are giving to closed charities and requests UWCFD contact donors regarding these donations. Donors are given 30 days to decide what to do in regards to these donations. UWCFD staff notify the CFD state office of each donor's request or lack of response. All refunds are processed by UWCFD staff through the UW payroll system.

*This policy has been so approved on May 8, 2017 by:*

  
Stephanie Horn  
Community Programs Deputy Director

  
Philip Kerrigan  
CFD Program Manager



Secretary of State



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