

PERSONAL CREDITS

Tips for Group Educational Service Redemption Form

- Coordinate the budget with CEP recipients to ensure that expectations are clear.
- Develop a **comprehensive budget** based on a best case scenario of the number of expected participants that will be pooling their credits. **(See sample template.)**
- Collect the Redemption Forms as they come in and on a regular basis (maybe once a week) and submit the Forms along with the budget.
- Make sure the INVOICE correlates to the number of Forms attached to the budget. For example – if you have 10 forms and all are using the full \$3000, then the invoice is for \$30,000.

Example of Invoice Schedule:

Date	Total Community Budget – 50 recipients	Number of Forms submitted	\$ Personal Credits Invoice amount	Balance of Credits to Redeem
July 11	\$150,000	15	\$45,000	\$105,000
July 18	\$150,000	10	\$30,000	\$75,000
July 25	\$150,000	5	\$15,000	\$60,000
Aug 1	\$150,000	10	\$30,000	\$30,000