



Double *the* Donation
matching gifts made easy

MATCHING GIFT POLICY TEMPLATE

Communicate Program Guidelines
With This Resource for Companies

Looking to launch a corporate gift-matching program at your company? The first (and arguably most essential) steps involve determining your [eligibility criteria](#) and communicating the policy to team members.

If you'd like to get a headstart on drafting your corporate matching gift guidelines, jump in with the free, customizable template provided below. Just don't forget to tweak and personalize the copy in order to best reflect your company's name and program guidelines!



[COMPANY NAME] Matching Gift Program — Terms + Conditions

[COMPANY NAME] is proud to offer a matching gift program where employees are encouraged to support nonprofit organizations in their communities and across the globe. In doing so, [COMPANY NAME] agrees to contribute matching donations to the nonprofits our team members support.

This initiative is a key component of [COMPANY NAME]'s efforts to improve corporate social responsibility and provide aid to organizations working to make the world a better place.

Minimum and Maximum Match Amounts

[COMPANY NAME] will match employee donations of between [MINIMUM MATCH AMOUNT] and [MAXIMUM MATCH AMOUNT] per employee per calendar year.

Donations must be made through acceptable payment methods, which include cash, personal check, money order, credit/debit card, PayPal, payroll deduction, or wire/bank transfer. [COMPANY NAME] may request a copy of the original donation receipt in order to verify the employee's gift that was made.

Matching Gift Ratio

Donation matches are paid out at a [X:Y] ratio, meaning that for every dollar an employee donates to a qualifying organization, [COMPANY NAME] will provide \$[MATCH AMOUNT] to the same cause.

Employee Eligibility

The following types of individuals are eligible to participate in [COMPANY NAME]'s matching gift program:

- ▶ Current full-time employees;
- ▶ Current part-time employees;
- ▶ Retired employees;
- ▶ Current employees' spouses;
- ▶ Retired employees' spouses.

Current employees must be active with [COMPANY NAME] at the time of the initial donation and the time during which the matching gift is submitted and paid out.

Organization Eligibility

[COMPANY NAME] enjoys supporting a wide range of nonprofit organizations through its dedicated employee matching gift program.

The following terms and conditions govern an organization's eligibility to participate in [COMPANY NAME]'s matching gifts program. Any eligible organization must meet ALL of the following requirements:

- ▶ Complies with all applicable laws;
- ▶ Has operated as a tax-exempt entity for at least one year at the time of the matching gift request submission;
- ▶ Does not discriminate in employment practices or services on the basis of race, religion, skin color, sex, sexual orientation, gender identification, national origin, age, marital status, veteran status, disability, pregnancy, or any other basis prohibited by applicable law;
- ▶ Falls into one or more of the following categories:
 - Federally registered and granted public charity tax-exempt status under Section 501(c)(3) of the Internal Revenue Code ("Tax-Exempt Status");
 - Non-U.S. organization that meets the Internal Revenue Service's Reliance Standards for Making Good Faith;
- ▶ Primarily functions as a(n):
 - Higher education institution;
 - K-12 school;
 - Health and/or human service;
 - Arts and/or cultural organization;
 - Civic and/or community organization;
 - Environmental organization;
 - Other 501 (c)(3) organization at the discretion of [COMPANY NAME].

- ▶ Does NOT meet any of the following criteria, at the discretion of **[COMPANY NAME]**:
 - Operates or supports activities that are counter to the policies, values, or ideals of **[COMPANY NAME]**;
 - Benefits terrorist groups or activities;
 - Benefit the employee, employee's family member, or person with whom the employee shares a close personal relationship;
 - Engages in controversial tactics or activities;
 - Supports political activities, advocates for or against state or federal legislation or campaigns on behalf of an elected or appointed government official or candidate in its primary purpose;
 - Promotes a particular religious faith, creed, or doctrine (e.g., ministries, missions, church planting projects, religious orders, schools whose primary purpose is to prepare students for ministry, etc.) in its primary purpose;
 - Functions primarily as a membership organization, including alumni foundations, athletic funds, fraternities and sororities, labor unions, or trade associations;
 - Functions as a government agency, with the exception of public schools and school districts as provided under the Internal Revenue Code.
- ▶ **[COMPANY NAME]** reserves the right to change, suspend, revoke, or terminate the matching gifts program or eligibility requirements of any organization at any time.

Matching Gift Request Process

- ▶ **[COMPANY NAME]** processes eligible donation matches and provides an applicable grant to participating organizations in the amount requested by the eligible employee. This process is paid out on a **[PAYMENT SCHEDULE]** basis through a matching gift management provider.
- ▶ In order to request a matching gift from **[COMPANY NAME]**, an eligible employee must attest that the organization benefiting from the match meets the eligibility requirements listed in the Program Terms and Conditions and follows all applicable laws. By submitting this request, the individual agrees that **[COMPANY NAME]** has the sole discretion to finalize the matching gift donation.
- ▶ In order to submit the match request, the individual should navigate to **[COMPANY NAME]'s** employee portal within the platform. Click here to do so **[LINK TO ONLINE REQUEST PORTAL]**.

Matching Gift Deadline

All matching gift requests must be made within **[# OF MONTHS, END OF CALENDAR YEAR, or OTHER DEADLINE STRUCTURE]**. Matches submitted following the previously determined deadline will no longer be eligible to receive a corporate matching gift.

In order to remain eligible, the employee donation AND match request must be made while the employee is an active employee of **[COMPANY NAME]**.

Looking for more information?

Contact **[MATCHING GIFT PROGRAM POINT OF CONTACT NAME]**, **[JOB TITLE]** at **[PHONE NUMBER]** or **[EMAIL ADDRESS]**.



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