



# chevron humankind program guidelines

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Chevron Humankind .....	1
Scope .....	1
Contribution limits .....	2
Eligible participants .....	2
Eligible recipient organizations .....	2
Restrictions on grants for giving and volunteering .....	3
Allowable financial contribution methods and processing .....	4
Volunteer requirements for grant requests .....	5
Special considerations for supporting charitable fundraising events .....	5
Match and volunteer grant request deadlines .....	6
Chevron Corporation governance .....	6
Volunteer governance forms .....	6

## Chevron Humankind

Chevron encourages employees and retirees to become personally involved in the communities where they live and work. Chevron Humankind is intended to improve the quality of life in these communities. It creates a partnership and increased visible engagement among employees, retirees, the company and community organizations. Chevron supports this partnership with cash matches to community organizations to which employees and retirees voluntarily contribute personal funds or volunteer time.

The company encourages employees and retirees to thoroughly research nonprofits to confirm that the organizations deliver value to the community and do not engage in practices or advocacy inconsistent with the company’s values and objectives.

## Scope

These guidelines apply to any personal contribution of funds or volunteer time made by Chevron employees, retirees or directors to eligible recipient organizations based in the United States, except those organizations that might represent a conflict of interest for Chevron.

## Contribution limits

Chevron will match up to the total approved annual budget in each calendar year. Once program funds have been exhausted during a calendar year, a notice will be posted on the Chevron Humankind website, and any requests received after that will not be matched in the current year.

Total annual individual caps on matching funds are as follows:

- Up to \$10,000 per year per employee or director (volunteer and financial grants *combined*)
- Up to \$3,000 per year per retiree (volunteer and financial grants *combined*)

Specific to **Matching Grants**, contribution minimums to qualify for matching funds are as follows:

- A one-time contribution made directly to a recipient organization must be at least \$20.
- A one-time payroll contribution must be at least \$20.
- A recurring payroll contribution can be as little as \$10 per pay period (equivalent to \$20 per month).

Specific to **Matching Grants**, contribution limits are as follows:

- A single contribution will only be matched by Chevron once. A Chevron employee and their Chevron employee spouse cannot request two matching grants for the same donation.

Specific to **Volunteer Grants**, volunteer grant limits are as follows:

- A minimum of 20 hours of verifiable volunteer time per individual with one nonprofit per year is required to qualify for a \$500 grant.
- A maximum of two grants per year per individual for one nonprofit or two different nonprofits is allowed.

## Eligible participants

The following individuals are eligible to participate in Chevron Humankind:

- All Chevron U.S.-paid employees and Chevron employees who are based in the United States.
- Former employees who retired having met eligibility requirements for retiree medical coverage from Chevron Corporation, a Chevron Corporation acquired company, and/or a Chevron affiliated company.
- Current and retired members of the board of directors of Chevron Corporation.

Employees and retirees of non-wholly owned subsidiaries of Chevron Corporation and spouses and surviving spouses of Chevron employees and retirees are not eligible to participate.

## Eligible recipient organizations

The following categories of organizations are eligible to receive matching funds and grants through Chevron Humankind:

- Nonprofit organizations and members of nonprofit groups that are recognized by the U.S. Internal Revenue Service both as tax-exempt under Section 501(c)(3) of the Internal Revenue Code (IRC) and as public charities. [IRS - Tax Exempt Organization Search](#)

**Note:** Chevron will consider matching gifts to programs operated by faith-based organizations if those programs: (a) are open to all individuals in the community regardless of religious belief; (b) serve a secular purpose, such as a food pantry or a homeless shelter; and

(c) do not require individuals to join in religious worship to receive the services that the nonprofit offers.

- Governmental entities such as public libraries, publicly owned and operated museums, municipal zoos, public schools, state colleges and universities, and community colleges. Government agencies must be registered with the IRS as a US 501(c)(3) to be eligible.

Chevron will not provide financial support to any of the following categories of organizations, even if they are otherwise potentially eligible:

- Organizations that discriminate against a person or group on the basis of race, religion, color, national origin, age, sex, gender identity, disability, status as a disabled veteran, political preference, sexual orientation, membership or non-membership in any lawful organization, or other basis prohibited by local laws or regulations. This is consistent with Corporate Policy 200 on nondiscrimination. For more information, please see <http://governance.chevron.com/policies.asp> (internal link only).
- Churches, synagogues, mosques, and other houses of worship.
- Private foundations.
- Political organizations and social welfare organizations as defined by the IRS under Section 501(c)(4) and business organizations as defined by the IRS under Section 501(c)(6).
- Organizations that do not comply with the USA PATRIOT Act.
- Organizations that might represent a conflict of interest with Chevron's business interests or its reputation or relationships with others.

**Note:** Chevron Corporation does not endorse the nonprofits that are in the Chevron Humankind database. Employees and retirees are encouraged to research the activities, practices, and viability of nonprofits before contributing volunteer or financial support.

### Restrictions on grants for giving and volunteering

Chevron Humankind will not match any charitable contribution requests or volunteer grant requests if the donor requesting the match or volunteer grant, their immediate family member or another person designated by a donor will derive any direct or indirect financial benefit in exchange for the contribution, including, but not limited to:

- Gifts, entertainment, travel, favored or discounted services, or anything more than nominal value
- Bequests or premiums for assigned insurance
- Tickets for athletic and cultural events
- Cash (including gift cards or gift certificates)
- Subscription fees
- Membership dues
- Multi-year commitments
- Deferred contributions
- Group contributions
- Payments in lieu of tuition, books, or student fees
- Pledges, unless paid in full during a single calendar year
- Tickets for charitable events, charity benefit auction purchases, charity sport registrations such as golf tournament registrations and race admission fees, or entry into raffles, drawings, or other contests or similar benefits
- Real property or personal property other than cash or securities

Humankind requests each employee disclose whether they have any affiliation with a charitable organization for which they are requesting a charitable matching contribution or volunteer grant. The

purpose of requesting this information is to ensure the matching contributions or volunteer grants do not provide a direct or indirect financial benefit to an employee or employee's immediate family member and are consistent with the Corporate Policy 282 on conflicts of interest.

Any misrepresentation or inaccuracy provided by an employee or retiree regarding a requested matching contribution or volunteer grant will forfeit the employee's or retiree's rights to any matching contributions and may result in disciplinary action up to termination of employment.

The company encourages employees and retirees to thoroughly research nonprofits to confirm that the organizations deliver value to the community and do not engage in practices or advocacy inconsistent with the company's values and objectives. As part of this research, we also encourage employees to review Corporate Policy 282 on conflicts of interest before submitting their match or volunteer requests. Contributions are strictly voluntary.

Contributions and program participation are strictly voluntary.

### Allowable financial contribution methods and processing

To be eligible for matching:

- A financial contribution must be the personal funds of an employee, director or retiree. Because matching is based on the individual caps of employees and retirees (\$10,000 and \$3,000 per year, respectively), funds pooled from multiple sources are ineligible for matching.
- A financial contribution made by an employee, director or retiree directly to a nonprofit must be in the form of cash, personal check, payroll deduction, credit card charge or marketable securities.

Payroll and credit card deductions will be processed through the Chevron Humankind system as directed by the employee. However, if Chevron is unable to deliver funds as directed or the nonprofit organization fails to cash a donation check within 120 days of the check issued date, the check will be voided and any recurring payroll deductions to this organization will be stopped. Outstanding payroll deductions will not be refunded to the employee. Employees will be notified via email with the option to redirect funds to a new eligible nonprofit organization. Employees and retirees with credit card deductions will also have the option to redirect funds to a new eligible nonprofit organization. Refunds are not available for credit card or payroll contributions. If the employee or retiree fails to take said action within two (2) weeks of initial outreach to redirect their donation, Chevron will donate the outstanding funds to **Chevron's Global Community Fund**, a Fidelity charitable giving account, to support Chevron's disaster relief efforts around the world.

Employees and retirees who contribute securities must transfer full ownership rights to the nonprofits they are supporting and have a reliable market quotation available to determine value. Securities are matched by averaging the high and low stock prices on the date of contribution.

Regarding private family foundations and Donor Advised Funds:

- Donor Advised Funds must be directly funded by the employee, retiree or director only, and the Fund must maintain a separate account segregating the contributions of the donor.
- Contributions made by a qualified family foundation or Donor Advised Fund must be directed by the donor and made on his or her behalf.

Employees may make financial contributions through the company's payroll in the Chevron Humankind website, except when supporting specific charitable fundraising events. Deductions must be directed to the charity and not an individual fundraising on behalf of a nonprofit organization.

## Volunteer requirements for grant requests

Eligible participants, whether employees, directors or retirees, must be active volunteers with the nonprofit organizations for which they are requesting matching grants and must directly volunteer personal time.

Volunteer time that qualifies for obtaining a Volunteer Grant:

- Must reflect the efforts of an individual employee or retiree and not a group of employee or retiree volunteers. Because matching is based on individual caps, hours pooled from multiple sources do not qualify for obtaining a grant.
- Can accrue from personal or company-sponsored volunteer efforts.
- Must amount to at least 20 hours of service with a single nonprofit.
- Must be verifiable – that is, the nonprofit where an employee or retiree serves must be able to verify the dates and times he or she has spent volunteering there.
- Can include time spent in training that is conducted by and that can be verified by the nonprofit.
- Does not include personal preparation or commute time.

Approval to volunteer with a nonprofit organization during company time is at the discretion of an individual employee's supervisor.

## Special considerations for supporting charitable fundraising events

Chevron Humankind will:

- Match employee and retiree personal financial contributions made directly to charitable fundraising event such as walks and runs held by eligible nonprofits. Funds pooled from multiple sources, i.e., sources other than the employee or retiree, are ineligible for matching. In addition, event registration fees and entrance fees are ineligible for matching.
- Provide a grant to match an employee's or retiree's volunteer time for an eligible nonprofit that holds a charitable fundraising event.

Guidelines for individual caps and eligible recipient organizations apply.

To be matched, a financial contribution to a charitable fundraising event must be personal funds of at least \$20 in the form of cash, personal check, or credit card charge. A contribution made by check must include the name of the employee or retiree in the payer section of the check. A credit card used to make a contribution to a charitable fundraising event must show the name of the employee or retiree on its face. As with contributions that are not event-related, funds pooled from multiple sources are ineligible for matching.

A match request must be submitted by the employee, director or retiree sponsoring an event participant; event participants are not responsible for requesting matching funds for the Chevron employees and retirees who sponsor them. An employee or retiree may sponsor more than one participant per event but must contribute to each participant, not a lump-sum donation, and request matches separately.

An event participant who is a Chevron employee, director, or retiree and who sponsors him- or herself must contribute personal funds to qualify for a match. As mentioned above event entrance fees are not eligible for a corporate match.

The time a Chevron employee or retiree spends *volunteering* for a nonprofit holding a charitable fundraising event is eligible volunteer time under Volunteer Grants. Time spent participating as a runner or walker (or the like) or obtaining pledges does not qualify as volunteer time for obtaining a volunteer grant because nonprofits that sponsor charitable fundraising events cannot verify participant hours. Pooled volunteer hours are also ineligible for obtaining a grant.

### **Match and volunteer grant request deadlines**

After contributing directly to a nonprofit organization, an employee, director or retiree has until January 31 of the following year to submit a match request.

After volunteering at a single nonprofit for at least 20 hours within a calendar year, an employee or retiree has until January 31 of the following year to submit a grant request.

Due to the volume of requests, there are no exceptions to this deadline.

### **Chevron Corporation governance**

No obligation is imposed upon or accepted by Chevron Corporation by reason of any application to the program(s) for funding. Chevron Corporation reserves the right to suspend, amend, revoke, modify or terminate, in whole or in part, the Humankind program at any time. Chevron Corporation reserves the right to audit institutional/organizations' records and documents pertaining to this program. If an ineligible gift or invalid representation of employee or retiree involvement generates an expenditure of Chevron Humankind funds, Chevron Corporation will expect the return of its gift from the recipient institution/organization. After review and authorization, payments are made on a periodic schedule and may be subject to calendar-year budgetary limitations. Funds for Chevron Humankind will be budgeted in the consolidated charitable contribution budget.

### **Volunteer governance forms**

Please note, prior to signing up for a Chevron-sponsored volunteer event, participants will be asked to read and understand the volunteer governance forms before conducting volunteer activities on behalf of Chevron. The documents can be found in the participant disclaimer prior to confirming event participation and signing up for the Chevron-sponsored event.

### **Questions?**

For additional questions email [Chevron-Support@yourcause.com](mailto:Chevron-Support@yourcause.com) and a member of the Customer Advocate Team will respond as soon as possible