



chevron humankind FAQs – matching grants

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Questions

Matching grants

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Answers

Matching grants

1. What are matching grants?

Matching grants are Chevron Humankind's means for administering matching funds for financial contributions made by employees and retirees to the nonprofits of their choice.

Through matching grants, employees and retirees can request a corporate match for a cash, check, credit card or stock contribution given directly to a nonprofit (offline giving).

Employees and retirees can make online contributions and apply for a matching grant using a credit card on the Chevron Humankind website (online giving).

Employees have the additional capability of donating and matching through a payroll deduction (Payroll Giving).

2. How much of my giving will Chevron Humankind match?

If you are an employee, Chevron Humankind will match up to \$10,000 of your giving to eligible recipient nonprofits each year. For retirees, the matching dollar amount is \$3,000 per year.

Volunteer matching grants count toward the \$10,000 annual cap for employees and the \$3,000 annual cap for retirees.

3. How will I know I'm getting close to my individual cap on matching funds?

Review your donation activity and history on the Chevron Humankind website to determine how close you are to your individual cap.

To review your donation activity and history:

1. Go to <http://www.chevronhumankind.com>.
2. Click on the **"Give"** tab and then click on **"My Giving."** You can also click on the **"View My Giving"** link on the homepage in the **"Charities Reached"** box.
3. In the **"Donation Activity"** tab:
 - The **"Scheduled"** section displays previously scheduled payroll deductions.
 - The **"Donated YTD"** section displays all current year credit card contributions and offline matches. It does not include volunteer grants.
4. In the **"Donation History"** tab:
 - **"Donation History"** displays donations from past years.
 - Export your donation summary in the **"Donated YTD"** and **"Donation History"** sections.

4. Will Chevron Humankind match the money I collect from co-workers and neighbors for a charitable cause?

No. Chevron Humankind matches only those dollars that come out of your own pocket. Matching is based on annual caps (\$10,000 for each employee and \$3,000 for each retiree). Chevron employees and retirees must request matching funds individually, and the nonprofit must be able to verify that it

has received their contributions. See Chevron Humankind Guidelines for more details on eligible participants.

5. How do I sign up for matching grants when I give directly to nonprofits by check, credit card or stock contribution?

To log an offline donation:

1. Go to <http://www.chevronhumankind.com>.
2. Click on the **“Give and Match”** box on the community home page.
3. Read the tips in the **“Things to Remember About Matching”** box.
4. Next, click on **“Find Your Charity.”**
5. Choose from your list of favorites or search for a new organization.
6. Click on **“Log an Offline Donation”** on the charity’s page.
7. Enter your original donation amount, the date you donated, the type of donation, the designation (secular designation is required for religious organizations) and upload your receipt. Your receipt must include your name, the date you donated, amount and charity name. The minimum donation to request a match is \$20.00.
8. Click on **“Add to My Cart”** and then **“Explore More”** to add more match requests or **“Checkout Now.”**
9. Once selecting **“Checkout Now,”** select **“Apply Match and Checkout.”**
10. Complete the **“Match and Eligibility Questions”** and click **“Next Step.”**
11. Read the **“Affirmation Statement”** and click on **“I have read and agree.”**
12. Under where the eligible match amount is listed, select the **“Apply for (amount)”** button.
13. Click **“Next Step.”**
14. Select your **Privacy Information.**
15. Click **“Next Step.”**
16. Review your offline match request details and click **“Confirm and Finish.”**

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 charity fails to cash a check prior to 180 days, the issued check will be voided. In this case, employees will be provided the option to redirect funds to a new eligible charity. If the employee fails to take said action, Chevron will donate the outstanding funds to Chevron’s charity partner of choice, **Project Lead the Way.**

6. What is the deadline for requesting a match after making a financial contribution directly to a nonprofit?

When you make a direct contribution, you have until January 31 of the following year to submit a match request.

7. What is the sign-up period for matching grants?

On the Chevron Humankind website, you can request a match 24/7 for any contribution you make directly to a nonprofit. You have until January 31 of the following year to submit a match request.

8. Is there a minimum contribution I need to make to obtain a match?

Yes. 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 must be at least \$10 per pay period (equivalent to \$20 per month).

9. When will the nonprofit I'm supporting receive funds?

Chevron Humankind processes payments in monthly cycles. As a result, the entire process (including verification of your donation when applicable, approval of the match and approvals for the allocation of funds) typically takes eight to ten weeks. However, requests may have different approval requirements. Please read below for details on how the various processes work so you can understand why a payment may take *many months* to be sent.

Note: We strongly encourage people to not make promises to their nonprofit recipients about matching funds as they may not be approved or may take a very long time to arrive in some cases.

Online giving:

(Payroll and credit card donations made via the Chevron Humankind Website)

Payroll giving and credit card donations are sent to the nonprofit along with the Chevron match, on the same check. In other words, a single check is sent to the nonprofit organization each month that includes both your contribution and the Chevron matching funds. As a result, the final payment from Chevron can take eight to ten weeks to be processed after the payroll or credit card contribution has been deducted.

Note: New payroll deduction requests take approximately two pay cycles to begin withdrawing the donation from your paycheck.

Offline Donations:

(Check, cash, credit card or stock donations given directly to a nonprofit)

Since your donation was not made via the Chevron Humankind website it needs to be verified before Chevron will provide matching funds. As a result, matching grant requests for Offline Donations will require a receipt to be provided along with your request. Please reference the **“Examples of Acceptable Receipts”** document in the **“Resources and Support”** section for examples of acceptable receipts.

Note: Match requests for larger offline donations may require verification from the nonprofit and therefore may take longer to process.

10. How can I access your database of eligible nonprofits for browsing?

A search function is provided to help you find and select your charities.

To access **“Search for an Organization,”** you have three options:

1. Click on the **“Give”** tab on the top of the page.
2. Click on the magnifying glass on the top right hand corner of the page under your name.
3. Click on the blue button that says **“Log a Donation.”**

From the charity search page, you can select your charity by:

- Choosing it from your list of favorite charities

- Choosing it from popular charities
- Searching for a new charity by entering the organization name or EIN
 - Click on “**View Profile**” to access the organization’s page

If you’re not requesting a match, you can still search the database and add charities to your favorites.

11. Why are some nonprofits not listed in the search results or listed as “Not Accepting Donations”?

Unfortunately, not every 501(c)3 organization is eligible to receive matching grants from Chevron Humankind.

- If a nonprofit is not listed in the search results it is *not eligible* to receive matching funds from Chevron. If you are having trouble finding a nonprofit you can contact YourCause support for assistance at chevron-support@yourcause.com.
- When a nonprofit is listed as “**Not Accepting Donations**,” the system is letting you know that the organization is in one of the following situations and is therefore *not eligible* to receive matching funds as a result:
 - They are no longer in good standing with the I.R.S. and/or have lost their charitable organization status (they must be listed on I.R.S. Publication 78)
 - They are not registered on Guidestar.org
 - They have chosen to not accept funds online, via Guidestar

If you would like help resolving one of the above issues for a nonprofit you give to or you suggest an organization be added to the system, our client service team at YourCause (chevron-support@yourcause.com) will contact the nonprofit and provide them with instructions on the steps they can take to get listed. Due to the large numbers of nonprofits and the various requirements they must each manage for themselves, we cannot guarantee an organization will be able to be deemed eligible. In the best of situations this process will take many months. Therefore, organizations who are not currently in the database or are presently listed as ‘Not Accepting Donations’ are unlikely to be funded within the calendar year.

12. If I can’t find a nonprofit in the Chevron Humankind database of eligible nonprofits, can I have it added?

All charities registered with the I.R.S. are included automatically in the new YourCause database. A search function is provided to find and select your charities.

Charities are listed by their legal name which may be different from how they are known in the community. Private schools and some other organizations will be listed under the name of the parent organization. In this case you need to request a match to the parent organization and add a designation to the local nonprofit. It is also important to note that as of 2012 the I.R.S. requires all funds be paid to the parent organization for distribution to the chapters or affiliate organizations. If you are having trouble with a designation, please email chevron-support@yourcause.com.

If you are unable to find your nonprofit by its name, you may also search by the nonprofit’s Employer Identification Number (EIN). You can locate the EIN by:

- a. Search Google for: “(Name of charity) form 990”.
The EIN should appear on the top right of the form 990, line “D.”

- b. Use this EIN number to search for your charity on the Chevron Humankind system by typing it into the “**Search**” box.

If your charity is NOT found in the search results you can click “**Resources and Support**” then **YourCause Resources** to suggest a new organization. You can also scroll over your name and select “**Help.**”

Note: Suggesting a new organization will alert YourCause customer service to contact the organization with instructions for becoming eligible. However, it is up to the organization to follow this procedure. Therefore, **suggesting an organization does not guarantee that they will be added to the system or be eligible to receive a matching grant.**

13. What are the special considerations for supporting charitable fundraising events such as walks and runs through Chevron Humankind?

Chevron Humankind will:

- Match employee and retiree financial contributions made directly to charitable fundraising events held by eligible nonprofits.
- Provide a Volunteer Grant for 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.

If you sponsor a participant: To be matched, your 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; support through the company’s payroll giving program is not available. Your contribution made by check must include your name in the payer section of the check. A credit card used to make a contribution to a charitable fundraising event must show your name on its face.

Because matching is based on individual annual caps (\$10,000 per employee and \$3,000 per retiree), funds pooled from multiple sources are ineligible for matching.

You must submit your own match request when you sponsor an event participant; event participants are not responsible for requesting matching funds for the Chevron employees and retirees who sponsor them. You can sponsor more than one participant per event, but you must make a contribution to each participant and request matches separately.

If you participate in a charitable fundraising event: If you sponsor yourself, be sure to request a match for your contribution made with personal funds. However, do not request matching funds for the Chevron employees and retirees who sponsor you. Please note: Event entrance fees are not eligible for a corporate match. In addition, your participation as a walker or runner (or the like) does not count as volunteer time for obtaining a Volunteer Grant; nonprofit organizations that sponsor such events cannot verify participant hours.

If you volunteer at a nonprofit that holds a charitable fundraising event: The time you spend volunteering at 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 because it cannot be verified by the nonprofit.

As with financial contributions, volunteer time accrued for obtaining a Volunteer Grant must pertain to an individual employee or retiree. See the Volunteer Grants section of this FAQ for more information about pooled hours.

14. How will I know Chevron Humankind has received my request for matching funds?

After you complete a request online, you will receive an email from us that confirms your request.

15. How do I know my match request has been approved?

After your request has been approved you will be sent an email confirmation. You can also review the status of your match request on the Chevron Humankind website.

You can access your donation history in two ways:

- Click on the “Give” tab and then click on “My Giving”; or
- Click on the “View My Giving” link on the homepage in the “Charities Reached” box.

“**Donation History**” displays donations from past years. You can also export your donation summary in the “**Donated YTD**” and “**Donation History**” sections.

16. My personal information has changed. Should I notify Chevron Humankind?

Whether you’re an employee or retiree, you do not need to notify Chevron Humankind of any changes in personal information. Such information is refreshed twice a month in our system from HR/Whitepages data.