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Guidelines for nonprofit organizations

Cardinal Health is a vital part of the healthcare continuum, serving manufacturers of pharmaceuticals and medical products, as well as those who care for patients, with the industry's broadest line of leading health care products and services offered through four primary business segments. Cardinal Health is a Fortune 50 company, employing more than 55,000 people on six continents and producing annual revenues of more than \$80 billion.

The company adheres to a set of principles that define who we are and how we do business as individuals and as a company. These EPPIC Core Values are thus reflected in our culture - one that is Ethical, People-driven, Performance-driven, Innovative and Collaborative – and serve as a basis for evaluating those with whom we become involved.

Community-Relations Mission and Areas of Focus

Our mission is to mobilize the resources of Cardinal Health to support our employees' interests and to improve the access to and delivery of quality services in conjunction with our business partners in communities and markets where we operate.

We focus our energy and resources on three primary program areas:

1. Employee volunteers and community involvement
2. Healthy and livable communities
3. Healthcare partnerships

Specific themes derived from the values of Cardinal Health will guide our support. We place greater focus on programs that fit the following criteria:

- Improve the health, livability and vitality in communities where we have operations
- Utilize the core expertise of Cardinal Health, its employees and its partners to provide leadership and mobilize others
- Apply innovative solutions in collaboration with our businesses and/or other partners
- Offer opportunities for involvement by Cardinal Health employees
- Demonstrate measurable results

Cardinal Health Community Relations Resources

There are four primary sources of community support that Cardinal Health provides to address issues important to our employees and healthcare:

1. The Cardinal Health Employees CARE Program encourages employees to be involved in their communities through matching gifts for financial contributions and grant opportunities for volunteer leadership, team volunteer or fund-raising projects.
2. The Cardinal Health Foundation supports national and global healthcare initiatives.
3. Cardinal Health business units provide local support for contributions and community relations activities.
4. Donations of products and/or expertise to leverage our business resources, skills and values.

Making a Request of Cardinal Health

Qualified, nonprofit organizations that fit our program interests are invited to submit a two to three page project summary clearly stating how the proposed initiative meets one or more of our areas of focus and responds to the basic principles outlined in these guidelines. We focus on grants for specific projects that can demonstrate innovative approaches with measurable results, rather than on general operating support. Based on a favorable review of the project summary, we will request a formal proposal for consideration. Unsolicited formal proposals will not be considered prior to a review of the project summary.

Key steps in making a request of Cardinal Health:

1. Review our program focus, criteria and funding restrictions.
2. Submit a two to three page project summary outlining and answering as many of the following questions as possible.
 - a. What issue or problem does your program or project address?
 - b. How does this issue relate to the mission of Cardinal Health, areas of focus and criteria?
 - c. What are your organization's credentials or capabilities for addressing this issue?
 - d. What is the scope of your program?
 - e. Who are the clients, audience or people served by this program?
 - f. What is the expected outcome of the program for which you seek support?
 - g. What specifically are you requesting of Cardinal Health?
 - h. What is the rationale for this request and the amount/resource requested of Cardinal Health?
 - i. What are the key program or deadline results?
 - j. How will you measure results or determine the success of this program?
 - k. How will you sustain this program after the support of Cardinal Health ends?
 - l. What will your organization expect of Cardinal Health in the future?
3. If Cardinal Health requests a formal proposal, you will also be asked to submit:
 - The most recent annual report or other information about your organization, its volunteer board and leadership, current programs, program and organization budget, financial statement, current IRS Form 990 and a list of other current or proposed contributors.
 - A copy of your organization's IRS tax-exempt 501(c)(3) letter of qualification.

Requests from national organizations and/or national initiatives should be directed to:

Cardinal Health Foundation
 7000 Cardinal Place
 Dublin, Ohio 43017

Phone: 614.757.7450
 e-mail: cardinalfoundation@cardinal.com

Organizations serving communities or regions where Cardinal Health has significant operations may address their requests to the manager of the local operation.

Groups, Programs and Activities We Do Not Support

As a general rule, neither the Cardinal Health Foundation nor the company's business units will support funding requests for the following types of programs and organizations:

- Capital campaigns
- Endowments
- Religious organizations or sectarian programs for religious purposes
- Veteran, labor, and political organizations or campaigns
- Fraternal, athletic or social clubs
- Requests for loans or debt retirements
- Individual endeavors or needs
- Organizations that discriminate on the basis of age, disability, religion, ethnic origin, gender, or sexual orientation
- Organizations with divisive or litigious public agendas

Additionally, because of certain regulations governing private foundations and by policy set by its Board of Directors, the Cardinal Health Foundation will not consider charitable grants in support of the following activities or programs:

- Hospitals or hospital foundations
- Disease-specific organizations
- Sports teams or athletic competitions
- Sponsorships
- Advertising

In addition to these general restrictions, Cardinal Health does not make charitable contributions to:

- Organizations without IRS 501(c)(3) or equivalent tax-exempt status
- Local chapters of organizations already receiving national support from Cardinal Health
- Independent organizations or projects outside the United States

Final Thoughts

On occasion, Cardinal Health recognizes that in-kind donations of products and services can be as valuable as a monetary grant. When considering in-kind donations, the same criteria and key questions will serve as our basis for reviewing and deciding which projects and initiatives to support with any available noncash resources.

Through the Cardinal Health Employees CARE program, our employees have the opportunity to direct a significant portion of our contributions budget to organizations serving our communities. As a result, we will look to our employees (through the CARE program) to help determine the allocation of the broad range of small grants so important to the many organizations making our communities better places to live and work.

We are aware that the demand for corporate involvement in every form is increasing. This also means that we continue to receive more requests for support than we can possibly fulfill. We promise to give every request a fair review. We hope that you will take the time to consider how your program fits into our guidelines before you submit a project summary. If you have any questions about our guidelines, or if you believe your program fits with our interests after you review these guidelines, please contact us before submitting a request.

Guidelines for Cardinal Health Employees CARE

Cardinal Health Giving Station

Cardinal Health strongly encourages and supports employee involvement in the community, recognizing our responsibility to be a good partner in the communities where we operate. Many Cardinal Health employees give generously of their time and money to make their communities better places to live and work. The Cardinal Health Foundation has created a new program, Cardinal Health Employees CARE, designed to recognize our employees' involvement and to partner with them in support of the programs and organizations they value. When employees support charitable organizations that help the community, the Cardinal Health Foundation will further their efforts. All regular, nonunion employees working a minimum of 20 hours per week are eligible to participate in the CARE program.

Matching Gifts

When Cardinal Health employees contribute \$25 or more to any approved charitable organization, the Cardinal Health Foundation will match their contribution(s) up to \$2,000 per employee per fiscal year. Organizations that fall within the following categories are eligible for matching gift funds:

- Nonprofit healthcare organizations including hospitals, hospital foundations, disease-specific organizations and medical research organizations (100% match)
- Nonprofit educational institutions serving preschool, elementary, secondary and postsecondary students (100% match)
- Nonprofit community, human service and cultural* organizations engaged in activities for the benefit of the public (50% match)

To participate in the matching-gift program, eligible employees can simply click on the link to the Cardinal Health Giving Station above and log in to the system to make a pledge or donation. Once an employee's donation has been confirmed, the corresponding matching gift will be processed automatically and sent to the charity selected. Matching gifts are processed at the end of each calendar quarter.

** These organizations include dance, theater, and opera companies; botanical and zoological societies; public arts councils; chamber and choral groups; symphonies; historical societies and preservation groups; libraries; museums; and public broadcast stations.*

Team Fund-Raising Grants

If teams of three or more employees raise money for eligible charitable organizations as part of a one-time activity not already supported by Cardinal Health or one of its affiliates, the Cardinal Health Foundation will match the funds the team raises up to \$2,500.

To qualify for a Cardinal Health Team Fund-Raising Grant, the team leader must complete the application form available through the [Cardinal Health Giving Station](#) and send it along with the funds raised to the eligible charitable organization. The organization should then complete its section, verify the team's contribution, and return the form to the Cardinal Health Foundation for processing.

Team Volunteer Project Grants

Teams of three or more employees may apply for grants of up to \$2,500 from the Cardinal Health Foundation when they offer their time for an ongoing hands-on team project. Such projects could include assisting at a local healthcare clinic or food bank, revamping a charity's computer system, or renovating a youth center.

To apply for a Team Volunteer Project Grant, the Cardinal Health team leader must complete an application form available through the [Cardinal Health Giving Station](#) and send it to the eligible charitable organization. The organization should complete its section validating the scope of the project, the time spent by the Cardinal Health team to complete the work during the fiscal year and the names of all Cardinal Health employees who were involved and return the form to the Cardinal Health Foundation for processing.

Volunteer Leadership Grants

The strong leadership skills and work experience that many Cardinal Health employees possess can be enormously beneficial to nonprofit organizations when employees agree to serve as volunteer board members, committee chairs or project leaders. This level of involvement requires a special commitment by employees that often carries expectations of financial support as well. Cardinal Health employees who serve in an official volunteer leadership capacity for nonprofit organizations may apply for grants of up to \$5,000 from the Cardinal Health Foundation.

To apply for a Volunteer Leadership Grant, the Cardinal Health employee must complete an application form available through the [Cardinal Health Giving Station](#) and send the form to the eligible charitable organization. The organization must verify the employee's volunteer role and forward the form to the Cardinal Health Foundation for processing.

Eligibility

To qualify for any of the Cardinal Health Employees CARE grants, organizations must be based in the United States or one of its territories and be recognized as tax-exempt 501(c)(3) by the U.S. Internal Revenue Service. If you are unsure whether an organization has this status, check their Web site or simply ask them. Educational institutions must be accredited by a regional accrediting association or a recognized independent accrediting group.

Program Limitations

The following types of organizations and gifts are excluded from the Cardinal Health Employees CARE Program:

General:

- Gifts from spouses and other family members
- Combined contributions from multiple individuals
- Payments for which donors, their families or other individuals designated by the donor receive a direct personal benefit or special treatment such as free tickets or meals; scholarships, tuition or student fees; or any other premiums or services

Types of Organizations:

- Organizations that do not serve an educational, community service or charitable purpose for the community at large
- Organizations/projects that are religious or political in nature
- Organizations that are member-based (veterans and labor organizations; fraternal, athletic or social clubs)
- Organizations that discriminate on the basis of age, disability, religion, ethnic origin, gender or sexual orientation
- Organizations with divisive or litigious public agendas

Types of Gifts:

- Memberships, subscriptions, club dues, legal obligations, loan repayments
- Private foundations or deferred-giving trusts
- Fundraising sponsorships or event tickets
- Sports teams, youth or adult sports leagues, or athletic competitions
- Recreational or extracurricular activities (sponsored travel, marching bands, youth clubs)

In addition to the above conditions, the Cardinal Health Foundation will not contribute more than 15% of an organization's operating budget in any given fiscal year.

The Directors of the Cardinal Health Foundation have the right to discontinue the Cardinal Health Employees CARE program or the eligibility of any individual employee or organization that violates the intent of the program or its guidelines at any time.

The Cardinal Health Foundation will issue checks quarterly based on receipt of completed application forms from eligible organizations and satisfactory completion of all requirements.