

# Con Edison and Orange & Rockland Matching Gift Program

Our Matching Gift Program was created with the idea that together we can help strengthen our neighborhoods and communities. When you contribute to nonprofit organizations in our service area — including New York City, Westchester, and O&R-served areas — we will match you dollar-for-dollar. We encourage you to support the organizations that matter to you and your family. And with a matching donation, we'll help you do even more.

## WHO IS ELIGIBLE?

- Any active, full-time employee or trustee of Con Edison and Orange & Rockland Utilities

## WHICH ORGANIZATIONS ARE ELIGIBLE?

The company matches your donations to most nonprofit, tax-exempt 501(c)3 organizations in our service area that are public charities, including:

- Arts and Culture
- Education
- Health and Human Services
- Civics
- Environment
- Diversity and Inclusion
- Community
- Financial
- Public Safety

## FUNDRAISING ELIGIBILITY

You may also be eligible for a matching gift for the funds you collect, individually, for a charitable event in which you are the active participant (walks, marathons, bike rides, etc.) provided that:

- Proceeds benefit the communities within our service territory;
- Funds are raised through your individual, personal effort; and
- You participate in the event in the same fiscal year that you request the matching gift. The company's match of your funds will count toward your personal annual match limit of \$5,000.

## WHICH ORGANIZATIONS ARE NOT ELIGIBLE?

- Organizations that discriminate on the basis of race, color, religion, national origin, disability, sexual orientation, gender identity/expression, veteran status, genetic information, sex, or age (within statutory limits) or any other legally prohibited basis
- Religious organizations (unless the gifts are designated to an ongoing secular community services program sponsored by these organizations, such as a food pantry, homeless shelter, or education)
- Political organizations; political parties; advocacy and lobbying groups
- Fraternal, professional, social, and labor groups
- Private foundations, donor-advised funds, and personal trusts
- Intermediary organizations whose primary focus is to raise funds and redistribute to other charities, such as United Way and Community Foundations
- Organizations whose activities do not focus predominantly on Con Edison's service territory (unless funding is restricted to a local chapter within the service territory)

#### WHAT FORMS OF GIFTS ARE ELIGIBLE?

- Checks
- Cash
- Credit Cards
- Securities with a quoted market value determined by the published bid price on the day the gift is made, or the proceeds from sale by the recipient prior to submission of the Matching Gifts application. Gifts of securities will be matched with cash.

#### WHAT TYPES OF GIFTS ARE NOT ELIGIBLE?

- Testamentary bequests
- Dues and subscription fees
- Tuition fees, loan repayments, and payments in lieu of tuition
- Books or student fees
- Gifts in exchange for which the donor receives material benefit, or which are made to satisfy a legally binding pledge
- Any portion of a contribution that covers expenses for benefit dinners, golf tournaments, etc., because those benefits do not qualify as charitable donations under federal income tax law
- Anticipated pledges. Pledges must be paid in full, and the company's matching gift must not be included as part of the pledge.
- Any gift which, in the opinion of the company, is not deductible by the donor for federal income tax purposes

#### OTHER TERMS OF THE PROGRAM

- The company will match all eligible gifts, dollar-for-dollar
- The minimum amount that will be matched is \$25
- The annual maximum amount that will be matched is \$5,000 per eligible individual per calendar year, subject to fund availability
- The \$5,000 may be divided among eligible organizations or given to a single organization
- The Matching Gift Fund is capped at \$625,000 per calendar year. A monthly update of the fund's availability can be found on the intranet under Public Affairs
- If an eligible individual's gifts exceed the maximum in any year, carry-over into succeeding years will not be permitted
- The company must have completed its due diligence to ensure receipt and acceptance of matching contributions
- Matches are processed after recipient organizations submit completed Matching Gift applications to Strategic Partnerships. Qualifying matches are mailed the month after Strategic Partnerships receives the completed applications.
- Strategic Partnerships reserves the right to discontinue or amend the program at any time, and also reserves the right to determine whether, in its sole discretion, a contribution qualifies. Matching gifts are subject to budget availability. The interpretation, application, and administration of the program shall be determined by the company, in its sole discretion, and its decision(s) shall be final. The company reserves the right to audit a potential organization's records and documents relating to this program and to request any supporting documentation it considers necessary
- Misuse of the program will result in permanent termination of the individual's eligibility to seek future gift matches and may lead to other disciplinary action
- The program's eligibility, terms, and conditions are subject to change at any time

## HOW TO PARTICIPATE

- The individual donor must fill out the Matching Gifts application. It must be completed in its entirety; failure to do so delays processing of the match
- Mail the application and your contribution to the organization
- An officer of the organization must complete their part of the application and mail it along with their W9 to the Matching Gift Program Manager, Con Edison, 4 Irving Place, New York, NY 10003
- One application must be completed for each gift
- To be eligible for a matching gift, your gift must be dated and acknowledged by the organization between March 1 and October 1, and received by Con Edison by October 31
- After the Matching Gifts Program Manager verifies that your contribution qualifies for a matching gift, a check will be sent to the organization
- The individual will be notified via email when the matching gift check has been mailed or if the individual's donation does not qualify for a matching gift
- Applications received after the \$625,000 program maximum has been reached will not be eligible for a matching gift
- You may email any questions relating to the Con Edison Matching Gift Program to [powerofgiving@coned.com](mailto:powerofgiving@coned.com)