



Express Scripts Foundation Matching Gift Program

This program can be changed or discontinued at the discretion of Express Scripts Foundation at any time for any reason.

Educational Matching Gift Purpose

Express Scripts Foundation partners with clients, members and employees to make a positive difference in the communities in which Express Scripts has a significant presence. Creating an educational matching gift program is one way for us to show our appreciation for quality schools, ensure a supply of educated resources and provide support for our communities.

Matching gift donations historically have been an important source of funds for educational institutions. They are also an important way for Express Scripts to allow employees to help direct Express Scripts Foundation funding to the schools of their choice. By respecting and reinforcing our employees' school preferences, we build employee pride, and we expand the base of contributions to educational institutions.

Overview of the Program

Express Scripts Foundation Matching Gift Program will match dollar-for-dollar gift donations in support of educational institutions that meet the eligibility requirements. The maximum matching gift donation amount is \$1,000 per employee, per calendar year. The minimum matching gift donation amount is \$50 per employee, per calendar year. Employees must follow the step-by-step procedures for approval and processing.

Eligibility Requirements

Eligible Donors

- Regular full-time Express Scripts employees
- Regular part-time Express Scripts employees who qualify for employee benefits

Eligible Educational Institutions

U.S. eligible educational institutions must have a 501(c)(3) status from the Internal Revenue Service.

- Colleges or universities are eligible if they provide associate, undergraduate, graduate or professional degrees and are accredited.
- Other eligible educational institutions may be accredited public or private schools offering instruction in pre-K-12 grade levels.

Canadian eligible educational institutions are colleges or universities at which the citizen is or was enrolled.



Eligibility Requirements continued

Educational Institutions Not Eligible

- Educational institutions not eligible for a match include, but are not limited to:
 - Day care centers
 - Hospitals
 - Radio and television stations
 - Zoos
 - Civic groups and cultural groups

Gifts Not Eligible

- Gift donations resulting in a tangible benefit to the employee are not match-eligible.
- Gifts not eligible for a match include, but are not limited to:
 - Subscription fees
 - Unpaid pledges
 - Loan repayments
 - Tuition and student fees
 - Donations required of parents
 - Tickets to events and dues payments
 - Greek organizations (fraternities, sororities, honor societies)

Step-by-Step Procedures

Step 1 – Eligible Employee's Responsibility

Logon to ESInet, then click on *Employee Resources/Community Involvement* to access program details. Print **all** the program information, which includes:

1. Educational Matching Gift Purpose
2. Overview of the Program
3. Eligibility Requirements
4. Step-by-Step Procedures
5. Form Part A
6. Form Part B

Complete Form Part A and mail **all** information noted above (1-6) to the eligible educational institution with your donation. The donation needs to be paid to the educational institution by cash, check or credit card.

If you do not have access to ESInet, program information can be obtained through Human Resources.

Note: Form Part B must be completed by the educational institution and returned to the Foundation, along with completed Form Part A, within 90 days of your gift donation to qualify for the match.



Step-by-Step Procedures continued

Step 2 – Eligible Educational Institution's Responsibility

The educational institution's matching gift officer completes Form Part B and mails it to Express Scripts Foundation, along with the completed Form Part A. The school confirms receipt of the gift donation and that it meets Express Scripts Foundation's eligibility requirements.

Step 3 – Express Scripts Foundation's Responsibility

A list of educational institutions and the approved funding amounts are provided to the Foundation's board of directors during normally scheduled meetings.

Express Scripts Foundation sends the employee and the educational institution a letter advising whether or not the match is approved.

Express Scripts Foundation sends each educational institution a single check annually. Checks are sent in the first quarter for approved matches made during the previous calendar year.