Changing our world, one donation at a time.
The Partnership for Giving is Merck’s year-round matching funds program that gives employees and retirees the opportunity to support community efforts and organizations that are important to them. Contributions to eligible organizations are matched by The Merck Company Foundation.

Support organizations in the following categories:
- Health and Human Services
- Arts and Culture
- Education
- Animal Welfare New!
- Environmental New!

Visit www.merckp4g.com during the fall to make your payroll deduction pledge or to change a current pledge.

Merck will match contributions year-round to eligible organizations through the Direct Giving option.

To learn more, visit www.merckp4g.com.
Questions? Call 1-866-205-2857  E-mail merckp4g@easymatch.com
Merck Partnership for Giving Guidelines

Mission

Throughout the Partnership for Giving, Merck helps employees and retired employees support community efforts and organizations that are important to them. Working together, Merck and its active and retired employees will help build strong and caring communities by helping those in need, promoting a healthier society, advancing education, fostering the arts, addressing the welfare of animals, and preserving the environment.

Donor Eligibility

Active U.S. and Puerto Rico-based employees (full- and part-time), retired U.S. employees, and members of Merck’s board of directors are eligible to participate in the Partnership for Giving.

* The Partnership for Giving matching gift benefit is available to legacy Merck employees in the U.S. and former legacy Merck employees in the U.S. who are considered retirees and to legacy Schering employees in the U.S. If it is not available to legacy Schering employees who are considered retirees.

Organization Eligibility

Health and human services agencies whose primary mission is to provide a health and human service, educational institutions (K-12 and higher education accredited by a nationally recognized accrediting agency or by a state department of education), and arts and culture; animal welfare, and environmental organizations are supported through the Partnership for Giving. These organizations must be based in the United States.

Organization Eligibility

Health and human services agencies whose primary mission is to provide a health and human service, educational institutions (K-12 and higher education accredited by a nationally recognized accrediting agency or by a state department of education), and arts and culture; animal welfare, and environmental organizations are supported through the Partnership for Giving. These organizations must be based in the United States.

I. Health and Human Services

Health organizations are those that seek to eliminate or control medical conditions caused by disease, genetics, injury, or environmental factors. Human services organizations are those whose programs and activities focus on the prevention, alleviation, or control and management of the effects of problems caused by human, natural, or bio-ecological circumstances while seeking to improve the quality of life for this affected population. There is a special focus on the ill and the needy, including those with physical or emotional disabilities, those who have problems with personal or social relationships, or those who are economically disadvantaged. These programs and activities serve the total range of the population at large and encompass the human life span, from infancy through old age.

Organizations that are considered health and human services include, but are not limited to, organizations that raise funds to support or provide services in the following areas: disease or disorder control or elimination; blood banks; mental-health care; free clinics; reproductive-healthcare facilities (including obstetric and gynecologic clinics); family planning centers; prenatal care; rehabilitative services or medical services; physical therapy (including pet therapy organizations); speech and hearing centers; emergency medical transport (EMT) services; home healthcare (including visiting-nurse associations and similar organizations that provide nursing care and related health services to homebound patients who might otherwise require care in an institution); hospices; organizations involved with alcohol, drug, or substance abuse or dependency prevention and treatment; suicide prevention; organizations involved with addictive disorders; counseling and support groups; and multipurpose organizations that provide a broad range of services to individuals or families, such as the Salvation Army; the American Red Cross; Catholic Charities, United Way, and Make-A-Wish Foundation.

II. Education

Educational associations supported by the Partnership for Giving are those that are fully accredited by nationally recognized accrediting agencies, or by state departments of education. These include:

• Primary schools
• Secondary schools
• College preparatory schools
• Technical institutions
• Two-year junior and community colleges
• Colleges and universities
• Professional and graduate schools
• National, regional, or state associations of educational institutions, such as national, regional, or state associations of public school districts
• Professional and graduate schools
• Colleges and universities
• National, regional, or state associations of educational institutions, such as the United Negro College Fund and the Independent College Funds of America, whose sole purpose is to raise funds on behalf of its members

III. Arts and Culture

The Partnership for Giving supports organizations and activities that promote, produce, or support works, discussions, or appreciation related to the humanities (literature, art, music, history, and philosophy). This also includes organizations that contribute to an aesthetic quest for knowledge (science and philosophy) through the human interpretation of art and speculation on the surrounding environment. Arts and culture includes, but is not limited to, botanical gardens; ethnic awareness; folk and traditional arts; arts education/schools of art (schools and organizations that promote education in a variety of artistic disciplines, including performing arts schools); arts councils/ agencies (organizations that provide funding, management, and programming services for a variety of art agencies in a specific geographic locale); architecture centers, opera companies, symphony orchestras; singing or choral groups; ballet companies; dance organizations; music (can include organizations that are considered bands, groups, or ensembles); performing arts (activities or actual performing arts centers); and theaters and theatre groups. Also included are humanities organizations (organizations that promote the study, teaching, or presentation of the humanities, such as archaeology, art history, modern and classical languages, philosophy, and ethics). Arts and culture may also include historical societies, activities, or preservation centers; genealogical activities and organizations; publishing activities, cultural exchanges with other countries; radio stations that are not members of the Public Broadcasting Service (PBS), PBS (includes National Public Radio [NPR] and Corporation for Public Broadcasting [CPB]) stations; museums (includes science museums, planetariums, and hobby museums); libraries; and zoos.

IV. Animal Welfare

Organizations addressing the welfare of animals. Animal welfare organizations that conduct significant lobbying and/or litigation activities are ineligible.

V. Environmental Organizations

Nonprofit environmental and conservation organizations primarily focused on activities that are open to and operated for the benefit of the general public (for example, Nature Conservancy and World Wildlife Fund). Environmental organizations that conduct significant lobbying and/or litigation activities are ineligible.

IRS Charitable Requirement

Your gift must be a voluntary charitable contribution made from your own personal resources and not from gifts or loans from any other person or organization. As a charitable contribution, your gift cannot be used to pay tuition, membership dues, or subscription fees; it cannot be used as payment in exchange for any kind of benefit received; and it cannot be given because you expect some monetary or other benefit to be given to you or to any other person or organization named by you. In addition, your gift cannot be used for religious or political purposes.

Giving Methods

Cash, check, credit card, or stock are options available for Direct Giving donations.

A fixed-dollar deduction per pay period is the only option for Payroll Deduction donations.

Program Dates

The direct giving option is available to eligible donors year-round. The matching funds limit will be tracked on a calendar-year basis (January 1 through December 31).

The payroll deduction option is available to eligible donors only during the payroll deduction enrollment period in the fall of each year. Special reminders and promotion will take place to announce the payroll deduction enrollment period.

Minimum/Maximum Program Limitations

The minimum gift is $24 per designated organization. Donations of less than $24 per organization will not be matched through the Partnership for Giving.

There is no maximum gift total. However, the maximum gift total that will be matched is $30,000 per eligible donor per calendar year.

The Foundation’s matching funds are made on an unrestricted basis even though you may designate how you want your personal gift used.

How to Request Matching Funds

Direct Giving

You may request matching funds for one-time cash, check, credit card, or stock gifts by using the Partnership for Giving online tool.
Requests should be made within 180 days of your contribution. To register your gift using this online tool, please visit the Partnership for Giving website (www.merckp4g.com). You may also request matching funds for one-time check or stock gifts using paper matching funds request forms. Either download a form from the Partnership for Giving website (www.merckp4g.com) or request that a form be sent to you by calling the Partnership for Giving toll free at 1-866-205-2857.

After verification that your gift has been received by the organization and that the organization qualifies for matching funds, a check will be forwarded to them by the Partnership for Giving, identifying you as the donor. Matching gifts are processed quarterly. Eligible requests received by the last day of March, June, September, or December are included in the current quarter’s payment. Requests that arrive after these dates are processed during the following quarter.

Payroll Deduction
Payroll deductions can only be made during the payroll deduction enrollment period in the fall of each year. You may make your payroll deduction pledge using the online pledging tool or by completing and submitting a paper pledge form. Changes (including cancellations and organization changes) to current payroll deductions may also be made during the enrollment period. Payroll deduction pledges automatically “rollover” to the next year. To make a payroll deduction pledge online, please visit the Partnership for Giving website (www.merckp4g.com). To use a paper pledge form, either download a form from the Partnership for Giving website (www.merckp4g.com) or request that a form be sent to you by calling the Partnership for Giving toll free at 1-866-205-2857.

If you choose ongoing payroll deduction, your funds will be disbursed to your designated organization(s) on a quarterly schedule beginning in April of the following year. Funds will be sent out approximately eight weeks following the end of a quarter. The Merck matching funds in your account will be disbursed in the current quarter’s payment. Requests that arrive after these dates are processed during the following quarter.

Payroll Deduction Pledge
If the designated qualified organization does not cash the checks it receives through the Partnership for Giving, it will receive three follow-up letters from the Partnership for Giving vendor as a reminder to cash the checks. Follow-up letters will be sent at 90, 120, and 150 days after the original transmission of the funds by the vendor to the designated organization. After 180 days, if the checks are still not cashed by the organization, the checks will be voided and the employee donations and the Merck matching funds will be sent to the United Way in the community in which the donor lives.

Payroll Deduction Gifts
Payroll deduction gifts can only be made during the payroll deduction eligibility period in the fall of each year. You may make your payroll deduction pledge using the online pledging tool or by completing and submitting a paper pledge form. Changes (including cancellations and organization changes) to current payroll deductions may also be made during the enrollment period. Payroll deduction pledges automatically “rollover” to the next year. To make a payroll deduction pledge online, please visit the Partnership for Giving website (www.merckp4g.com). To use a paper pledge form, either download a form from the Partnership for Giving website (www.merckp4g.com) or request that a form be sent to you by calling the Partnership for Giving toll free at 1-866-205-2857.

If you choose ongoing payroll deduction, your funds will be disbursed to your designated organization(s) on a quarterly schedule beginning in April of the following year. Funds will be sent out approximately eight weeks following the end of a quarter. The Merck matching funds in your account will be disbursed in the current quarter’s payment. Requests that arrive after these dates are processed during the following quarter.

If the charity wants to produce its own tax receipt, the following message displays. Recordkeeping Documentation: Please contact the [Name] Charity if you need a tax receipt for this donation. Some charities will send the tax receipt automatically; other charities will not send a receipt unless the donor requests one. If you need a receipt and have not received one, please contact the charity directly.

Matching Administration
The Merck Partnership for Giving reserves the right not to match gifts to any organization that it may determine is not an appropriate recipient for charitable funds.

The Partnership for Giving program may be restored, suspended, or terminated at any time, at the option of The Merck Company Foundation. It determination on any questions of interpretation, application of provision, or administration shall be final.

Charitable Flex Fund
The Charitable Flex Fund is an organization selection made available through the Partnership for Giving but is managed and administered by the Bergen County United Way.

This is how it works:
• Make your donation to the Charitable Flex Fund as a one-time gift or as a payroll deduction pledge.
• Merck matches your donation 50%, up to a limit of $30,000 per eligible donor per year (minimum donation of $100 is required).
• Both your donation and the Merck matching funds will be deposited in your name to your individual Charitable Flex Fund account.
• You’ll receive a welcome package via mail providing you with your personal identification number (PIN).
• If you are giving directly to your account, you must request matching funds through the Partnership for Giving Direct Giving option.
• Once your individual account has been set up, you can log on to the secure Flex Fund website (www.myparlux.com) using your PIN to view your current available Flex Fund account balance and make your gifts to organizations that are eligible through the Partnership for Giving at your convenience.
• To experience how the Flex Fund works, please visit the test site at www.myparlux.com/merckdemo. Enter “test” as the last name and 1111 as the PIN.

You may use the website to designate amounts you wish to distribute to eligible organizations throughout the year using the funds in your account. A minimum distribution of $25 per agency is required for each designation you make.

Merck is not responsible for any aspect of the administration of the Charitable Flex Fund, including Internet security and fiduciary accountability.

For more information about the Charitable Flex Fund, please contact Flex Fund customer service representatives at 1-800-543-1203.

Detailed Charitable Flex Fund guidelines and FAQs can be found on the Partnership for Giving website (www.merckp4g.com).

Gifts That Will Not Be Matched by the Foundation
Payments such as the following are not eligible for matching funds by the Foundation:
• Requests and deferred giving plans
• Combined gifts from a group of people represented as one gift from an eligible donor
• Dues payable to alumni groups or subscription fees for publications
• Gifts of real estate or other property (except securities)
• Gifts given through a third party or gifts given to an educational institution or hospital as a way of supporting a third-party organization (e.g., an athletic, religious, or social organization)
• Gifts intended to fulfill a person’s pledges, tithes, or other church-related financial commitments
• Gifts to support extracurricular activities such as athletics (including athletic clubs), marching bands, and yearbooks
• Premium payments for insurance with the institution named as a beneficiary
• Payments of tuition or other fees
• Pledges not paid
• Gifts to rifle, cricket, or economic development organizations
• Gifts to houses of worship (e.g., churches, synagogues, etc.)
• Contributions to religious organizations whose principal purpose is promoting a particular religious faith, creed, or doctrine (e.g., missions, church planting projects, religious orders, etc.)
• Gifts to support capital expenditures

Changing our world, one donation at a time.
What is the Merck Partnership for Giving?
The Merck Partnership for Giving is a matching funds program that enables eligible Merck donors to make contributions to qualifying organizations. The contributions are then matched by The Merck Company Foundation. Generally, if the donor’s contribution adheres to the Partnership for Giving program guidelines, the request for matching funds will be honored. However, The Merck Company Foundation reserves the right not to match gifts to any organization that it determines is not an appropriate recipient for charitable funds.

Who is eligible to participate in the Partnership for Giving?
Active U.S. and Puerto Rico-based employees (full- and part-time), retired U.S. employees, and members of Merck’s board of directors are eligible to participate in the Partnership for Giving. * The Partnership for Giving matching gift benefit is available to legacy Merck employees in the U.S. and former legacy Merck employees in the U.S. who are considered retirees and to legacy Schering employees in the U.S.; it is not available to legacy Schering employees who are considered retirees.

What organizations are eligible to receive matching funds through the Partnership for Giving?
Health and human services agencies whose primary mission is to provide a health and human service, educational institutions (K–12 and higher education accredited by a nationally recognized accrediting agency or by state departments of education), and arts and culture; animal welfare, and environmental organizations are supported through the Partnership for Giving. These organizations must be described in sections 501(c)(3), 509(a), or 170(c)(1) status (be tax exempt) to receive matching funds through the Merck Partnership for Giving.

I. Health and Human Services
Health organizations are those that seek to eliminate or control medical conditions caused by disease, genetics, injury, or environmental factors. Human services organizations are those whose programs and activities focus on the prevention, alleviation, or control and management of the effects of problems caused by human, natural, or biological circumstances while seeking to improve the quality of life for this affected population. There is a special focus on the ill and the needy, including those with physical or emotional disabilities, those who have problems with personal or social relationships, and those who are economically disadvantaged. These programs and activities serve the total range of the population at large and encompass the human life span, from infancy through old age.

II. Educational
Educational associations supported by the Partnership for Giving are those that are fully accredited by nationally recognized accrediting agencies, or by state departments of education. These include:  • Primary schools  • Secondary schools  • College preparatory schools  • Technical institutions  • Two-year junior and community colleges

What do the terms 501(c)(3), 509(a), and 170(c)(1) mean?
The terms 501(c)(3), 509(a), and 170(c)(1) refer to sections of the Federal Tax Code that establish the criteria for tax-exempt charitable organizations. An organization must have 501(c)(3), 509(a), or 170(c)(1) status (be tax exempt) to receive matching funds through the Merck Partnership for Giving. 

*Note: Not all 501(c)(3) organizations qualify for the program.

What gifts will not be matched by the Foundation?
Payments such as the following are not eligible for matching funds by the Foundation:
  • Requests and deferred giving plans  • Combined gifts from a group of people represented as one gift from an eligible donor  • Dues payable to alumni groups or subscription fees for publications  • Gifts of real estate or other property (except securities)  • Gifts given through a third party or gifts given to an educational institution or hospital as a way of supporting a third-party organization (e.g., athletic, religious, or social organization)  • Gifts intended to fulfill a person’s pledges, gifts, or other charitable-related financial commitments  • Gifts to support extracurricular activities such as athletics (including athletic clubs), marching bands, and yearbooks  • Premium payments for insurance with the institution named as a beneficiary  • Payments of tuition or other fees  • Pledges not paid  • Gifts to rife, crick, or economic development organizations  • Gifts to houses of worship (e.g., churches, synagogues, etc.)

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Contribute to religious programs or organizations whose principal purpose is; or in support of any organization or cause to which you provide monetary or other benefit to you or to any other person or organization named by you. In addition, your gift cannot be used to pay tuition, membership dues, or subscription fees. Contributions to religious programs or organizations whose principal purpose is; or in support of any organization or cause to which you provide monetary or other benefit to you or to any other person or organization named by you. In addition, your gift cannot be used for religious or political purposes.

Is there a minimum or maximum gift amount? The minimum gift is $24 per designated organization. Donations of less than $24 per organization will not be matched through the Partnership for Giving. There is no minimum gift total. However, the maximum gift total that will be matched is $50,000 per eligible donor per calendar year. The Foundation’s matching funds are made on an unrestricted basis even though you may designate how you want your personal gift used.

How is the annual donor limit determined? The annual donor limit is determined by the actual date of the donor’s contribution to the recipient organization. For example, if you make a donation of $5,000 on December 31, 2010, to an eligible organization but submit your request for matching funds in January 2011, the matching funds award, if approved, will be credited to your 2010 donor limit.

What are the Partnership for Giving program dates? The direct giving option is available to eligible donors year-round. The matching funds limit will be tracked on a calendar-year basis (January 1 through December 31). The partnership deduction option is available to eligible donors only during the partnership deduction enrollment period in the fall of each year. Special reminders and promotion will take place to announce the partnership deduction enrollment period.

Will I be able to receive benefits for my donation? No. Your gift must be a voluntary charitable contribution made from your own personal resources and not from gifts or loans from any other person or organization. As a charitable contribution, your gift cannot be used to pay tuition, membership dues, or subscription fees; it cannot be used as payment in exchange for any kind of benefit received, and it cannot be given because you expect a monetary or other benefit to be given to you or to any other person or organization named by you. In addition, your gift cannot be used for religious or political purposes.

Is my donation considered pretax or posttax? Posttax. This means that social security, federal, state, and city taxes have already been withheld from the money you are donating. After verification that your gift has been received by the organization and that the organization qualifies for matching funds, a check will be forwarded to them by the Partnership for Giving, identifying you as the donor. Matching gifts are processed quarterly. Eligible requests received by the last day of March, June, September, or December are included in the current quarter’s payment. Requests that arrive after these dates are processed during the following quarter.

How does Merck match my stock gift? Merck matches the realized value of donated stock in cash. The realized value of the donated stock is calculated using the average market price on the day of the authorized transfer. The Partnership for Giving vendor, The JK Group, will send matching funds from Merck to the organization after receiving verification of the realized value of the donated stock. (The value of securities, for matching purposes, will be determined by The Merck Company Foundation based on the quoted market value on the date of the gift or a weighted average if the gift is made on a nontrading day.)

May I donate Merck stock options? No, you may not donate Merck stock options. However, you may donate Merck stock after you exercise your options.

What are the tax advantages of giving stock? You can deduct the full current value of the stock (regardless of purchase price) and avoid the capital gains taxes associated with selling the stock for profit. Therefore, you pay no taxes on the appreciated value of the stock and take the full deduction for the current value of the stock.

How do I request matching funds? Donors using the direct giving option will make their contributions (cash, check, credit card, or stock) directly to the recipient organization. Donors will then process (online or via paper form) a request for matching funds. Donors may also request matching funds for one-time check or stock gifts by using paper matching funds request forms. Either download a form from the Partnership for Giving website (www.merckp4g.com) or request that a form be sent to you by calling the Partnership for Giving toll-free at 1-866-205-2857.

Payroll Deduction FAQs

May I support eligible organizations using payroll deduction? Yes. You may make your contributions through the Partnership for Giving using the payroll deduction option. However, you may only select payroll deduction during the payroll deduction enrollment period, which occurs annually in the fall. During this time only, you may select a fixed dollar amount per pay period to be deducted from your paycheck.

Is there a percentage-of-salary payroll deduction available? No, the percent payroll deduction is no longer available. You may only request that a fixed dollar amount per pay period be deducted from your paycheck.

How do I use the payroll deduction method? Payroll deduction gifts can only be made during the payroll deduction enrollment period in the fall of each year. You may make your payroll deduction pledge using the online pledging tool or by completing and submitting a paper pledge form. To make a payroll deduction pledge online, please visit www.merckp4g.com. To use a paper pledge form, either download a form from the Partnership for Giving website (www.merckp4g.com) or request that a form be sent to you by calling the Partnership for Giving toll-free at 1-866-205-2857. After you have completed the pledge form, you will mail it to Merck Partnership for Giving, PO Box 7219, Princeton, NJ 08543-7219. It must be postmarked by October 15.

Changing our world, one donation at a time.
Questions? Call toll free: 1-866-205-2857 or E-mail: merckp4g@easymatch.com

Partnership for Giving requirements are eligible for matching funds. Use it as a resource. Organizations in the United States, please visit www.guidestar.com and community in which you live. For a listing and description of nonprofit organizations, please visit www.guidestar.com.

If the designated qualified organization does not cash the checks it receives through the Partnership for Giving, it will receive three follow-up letters from the Partnership for Giving vendor as a reminder to cash the checks. Follow-up letters will be sent at 90, 120, and 150 days after the original transtal of the funds by the vendor to the designated organization. After 180 days, if the checks are still not cashed by the organization, the checks will be voided and the employee donations and the Merck matching funds will be sent to the United Way in the community in which the donor lives.

I don't know if my organization is eligible. What should I do?
If you do not know if an organization is eligible, please supply the organization name, address, city, state, zip code, phone number, and Federal Tax ID number (if available) on the paper pledge form or online. Organizations not currently in the vendor’s database will go through an organization validation process to ensure that they meet Partnership for Giving guidelines and IRS requirements. If an organization is eligible, it will be matched. If an organization is ineligible, you will be notified and asked to designate another organization. If the Partnership for Giving vendor, The JK Group, has repeatedly tried to contact you regarding the selection of a new eligible organization, you will be asked to designate another organization and has received no response from you by May 31 of the year following the payroll deduction enrollment period, your payroll deduction will be discontinued as of January of the following year. If you wish to cancel your payroll deduction after the payroll deduction enrollment period, send an e-mail to merckp4g@easymatch.com. The following details must be included with your request: full name, WIN, and the date of your request. Your request will be processed and your payroll deduction will be discontinued beginning with the next payroll cycle.

How are my donations and the Merck matching funds disbursed to my designated organizations?
If you choose to give by ongoing fixed payroll deduction, your funds will be disbursed to your designated organization(s) on a quarterly schedule beginning in April of the following year. Funds will be sent out approximately eight weeks following the end of a quarter. The Merck matching funds are sent on the same quarterly schedule. The minimum disbursement threshold is $100 per organization. If, at the end of the quarter, the payroll deduction funds from all donors for an organization total less than $100, the funds are still not cashed by the organization, the checks will be voided, and your donation along with the Merck matching funds will be sent to the United Way in the community in which you live.

How can I request a tax receipt?
You must provide permission to the Partnership for Giving vendor to release only your name and address to the designated organization. If you elect to remain anonymous or permit the vendor to release only your name, you cannot request a tax receipt. Once permission is granted, the Partnership for Giving vendor will forward your contact information to your designated organization and request that the organization provide a tax receipt.

What happens if my ongoing payroll deduction is discontinued or canceled?
If the designated qualified organization does not cash the donation check it receives during the payroll deduction enrollment period each fall, you may use the online tool to discontinue your current payroll deduction. Simply visit www.merckp4g.com.

Changing our world, one donation at a time.