



## MATCHING GIFT, INDIVIDUAL AND TEAM GRANT PROGRAMS

At PBC, employees set the giving agenda. The PBC Foundation supports organizations in the communities where our employees live and work. You can impact your community by volunteering your time, service or funding. PBC Gives Back offers matching gift, fundraising and volunteer grant programs.

### ELIGIBLE PARTICIPANTS

- Regular full time employees
- Flex-eligible part time PBC employees
- PBC retirees
- Spouses of eligible individuals
- Domestic partners of eligible individuals

### ELIGIBLE ORGANIZATIONS/INSTITUTIONS

- All U.S. institutions or organizations must be recognized as tax exempt 501(c)(3) by the IRS.
- Educational institutions must be accredited by one of the regional accredited associations or an independent accrediting group.
- Entirely secular programs of religious organizations may be considered for matching funds.
- Any not for profit, non proprietary organizations located outside the U.S. that are organized and operated for charitable or educational purposes will be reviewed for eligibility on an individual basis.

### RESTRICTIONS

#### Matching Gift

The Foundation cannot match donations such as: contributions to those organizations existing primarily for political or religious purpose, individual contributions to the United Way (outside of the annual campaign), contributions that result in a benefit of monetary value (e.g. seats at a dinner event, ad in a program, etc.), private foundations, private operating foundations, and personal or family foundations, tuition, unpaid pledges, fees for service, subscriptions, tickets or memberships, publications and dues, bequests or legacies.

#### Volunteer

The Foundation can only provide grants for volunteerism. Grant requests in which the volunteer has received a benefit of any type (monetary, tangible, or intangible) will be declined.

### ADMINISTRATIVE CONDITIONS

- Grant applications expire 6 months from date of activity or gift
- Grants are administered on a quarterly basis
- Checks expire 180 days from date issued

*The PBG Foundation may suspend, change or terminate any of the Gives Back programs at any time, for any reason. The interpretation, application and administration of all grant programs shall be determined by the PBG Foundation, whose decision shall be final.*

### INTERNATIONAL GRANTS

Outside the U.S., the PBG Foundation uses a second-party organization, Charities Aid Foundation America (CAF America) to administer all international grants. CAF America will research and determine the eligibility of non-U.S. charities and will issue the grants, which are funded by the PBG Foundation. The length of the review process is dependent upon the responsiveness of your chosen non-profit.

### INDIVIDUAL

If you volunteer 20 hours in a calendar year at a qualified organization, the PBG Foundation will donate \$250 to that organization on your behalf.

If you volunteer 40 or more hours in a calendar year at a qualified organization, the PBG Foundation will donate \$500 to that organization on your behalf.

### TEAM

#### One-Day Team Volunteer Project Grant:

- Three to nine employees/retirees are eligible for a \$500 grant.
- Ten or more employees/retirees are eligible for a \$1,000 grant.

#### Ongoing Team Volunteer Project Grant

- Three or more employees/retirees who volunteer with an eligible organization on three or more separate occasions may be eligible for a \$2,500 grant.

#### Fundraising Event

- Three or more employees/retirees who raise money for an eligible organization as part of a one time activity, may be eligible for a match up to \$1000 by the PBG Foundation.

### MATCHING GIFT

The PBG Foundation will match any **personal** donation of \$25 or more, up to \$10,000 each year, to an approved, 501(c)(3) organization during the calendar year. Any gift of \$1,000 or more will require a copy of the cancelled check. Gifts must be in the form of cash, marketable securities, stocks or shares and from the employee's personal assets.

### 2:1 MATCH

The PBG Foundation will double match a monetary donation if the eligible employee sits on the board of that organization. *Written verification from the organization is required.*

### APPLICATION PROCEDURE

1. Eligible participants must complete Part 1 and the appropriate section of Part 3 (on back page).
2. Mail the form to the institution or organization to complete.
3. An authorized officer from the organization must verify Part 1 and Part 3 and then complete Part 2 of the form in its entirety. They must also include the following documents with this form:
  - Organization mission statement
  - 501(C)3 determination letter verifying Non-profit status (U.S.)
  - Certification of non-profit status (Non-U.S. Organizations only)
4. Completed forms must be mailed to the PBG Foundation for processing at 1 Pepsi Way, Somers, NY 10589.

*Incomplete forms will result in processing delays. All grant applications must be received within 6 months from the time of donation or date of final activity. The last day to submit a grant is October 31, 2010.*

# MATCHING GIFT, INDIVIDUAL AND TEAM GRANT APPLICATIONS

## PART 1

### APPLICANT SECTION

Complete the information below, sign and forward to recipient organization for verification. All incomplete forms will be returned to the applicant.

Please indicate if your company prior to close was:

PAS  PBG

EMPLOYEE / RETIREE / TEAM LEADER FULL NAME

APPLICANT WORK LOCATION AND / OR ADDRESS

PHONE

EMPLOYEE ID #

EMAIL

RECIPIENT ORGANIZATION NAME

RECIPIENT ORGANIZATION ADDRESS

EMPLOYEE / RETIREE SIGNATURE

DATE

I certify that the above information submitted is correct and fully complies with the program parameters. I further certify that the contributions made to the organizations/ will not benefit myself, team members, or family members in any way.

## PART 2

### RECIPIENT ORGANIZATION SECTION

Complete the information below, sign and forward to the PBG Foundation to the address below. Be sure all required documentation is enclosed.

RECIPIENT ORGANIZATION'S LEGAL NAME

RECIPIENT ORGANIZATION'S FULL ADDRESS (including country)

CONTACT/AUTHORIZED OFFICER NAME

TITLE

ORGANIZATION EMPLOYER ID #

PHONE

FAX

EMAIL

AMOUNT OF TAX DEDUCTIBLE GIFT RECEIVED (minimum \$25)

# OF HOURS VOLUNTEERED BY PBC EMPLOYEE/RETIREE

DOLLAR AMOUNT RAISED

# OF HOURS VOLUNTEERED

AUTHORIZED OFFICER SIGNATURE

DATE

I confirm the above indicated ( i.e., gift received, number of volunteer hours, fundraising activity) is accurate and that this institution is tax exempt under the U.S. Internal Revenue Code. I further confirm the gift or services received fully comply with the program parameters. No benefit will accrue to the donors or to any member of their families as a result of their contributions.

## PART 3

### PLEASE FILL IN THE APPROPRIATE INFORMATION BELOW

#### PART 3A - MATCHING GIFT

(please check one)

- Active full-time or flex part-time employee  Spouse of eligible participant  
 Retiree  Domestic partner of a full-time employee or retiree

NAME OF SPOUSE IF DONOR

I serve on recipient organization's BOD and am applying for a double match.

AMOUNT OF TAX-DEDUCTIBLE GIFT (\$25 minimum)

#### PART 3B - INDIVIDUAL VOLUNTEER GRANT

On a separate sheet, please describe the activity for each volunteer day in detail, including total hours volunteered and the organization's name. You are eligible for one grant per organization, per calendar year. If you plan to volunteer at least 40 hours for an organization please only submit for the \$500 grant when you have completed all 40 volunteer hours.

TOTAL # OF HOURS VOLUNTEERED (minimum of 20 hours)

I would like to present the check to the organization. Please send the check to my attention at this mailing address: \_\_\_\_\_

#### PART 3C - TEAM FUNDRAISING AND VOLUNTEER GRANTS

(please check one)

- Team fundraising grant  One-day team volunteer grant  Ongoing team volunteer grant (3 or more separate occasions)

##### Team Information/Activity Log:

On a separate sheet, please include team lead name, work location address, team member names and employee ID, date(s) and location(s) of volunteer activity/event, description of volunteer efforts and total hours of service. If this involved a fundraising activity please describe in detail what was done to raise funds, i.e. walk-a-thon, bake sale, etc.

\$ TOTAL AMOUNT RAISED

I would like to present the check to the organization. Please send the check to my attention at this mailing address: \_\_\_\_\_

Please include the following documents with this form:

- Organization mission statement
- 501(C)(3) determination letter verifying Non-profit status (U.S.)
- Certification of non-profit status (Non-U.S. Organizations only)

Please send completed form and required documentation to:

The PBG Foundation  
1 Pepsi Way  
Somers, NY 10589

