

**THE FLUOR FOUNDATION  
MATCHING GIFT PROGRAM  
FOR  
COLLEGES AND UNIVERSITIES AND  
ELEMENTARY/SECONDARY EDUCATION**

*"The Fluor Foundation is pleased to offer our employees a matching gift program to support academic programs at eligible private or public elementary and secondary schools, universities, colleges, and technical schools. Together, our contributions will support education at all levels."*

Torrence H. Robinson  
President, The Fluor Foundation

## **MATCHING LIMITS**

The Fluor Foundation will match \$1 for every \$1 an eligible donor contributes to an eligible educational institution as described below. The minimum gift amount matched is \$50. **The maximum amount matched per donor each fiscal year (January - December) is \$5,000 combined total to all institutions through this program.** A donor may contribute to one or more institutions. Contributions must be in the form of cash or securities.

## **ELIGIBLE DONORS**

1. Salaried full-time and salaried part-time U.S.-based employees of Fluor and its subsidiaries. U.S.-based employees working outside the U.S. are also eligible.
  - a. Employees must have completed one year of service and be employed at the time the matching gift form is received by the Foundation.
  - b. Employees meeting the above requirements who are on a leave of absence are also eligible.
2. Members of the Board of Directors of Fluor Corporation.

## **ELIGIBLE EDUCATIONAL INSTITUTION**

Institutions must be classified by the Internal Revenue Service as tax-exempt institutions to which contributions by an individual are deductible for federal income tax purposes

1. A public or private degree-granting university, two- or four-year college, graduate, professional, or technical school that is located in the U.S. or its territories, and is accredited by regional, national, professional, or specialized agencies recognized as accrediting bodies by the U.S. Secretary of Education, the Council for Higher Education (CHEA), or by the Council on Postsecondary Accreditation (COPA)/Commission on Recognition of Postsecondary Accreditation (CORPA).
2. An educational fund whose sole purpose is raising funds for its constituent members and whose members are eligible institutions as defined above (e.g., United Negro College Fund, Hispanic Association of Colleges and Universities, American Indian College Fund.)
3. A tax-exempt organization whose primary purpose is the collection of funds and issuance of academic scholarships for post-secondary education.
4. Private or public elementary and secondary schools (grades Kindergarten-12) located in the U.S. or its territories, or foundations affiliated with an eligible school. The school must be accredited by one of the six regional accrediting agencies; an approved member association of the National Association of Independent Schools; Commission on Accreditation; the National Council for Private School Accreditation; or the State Department of Education of the state in which the school is located.

## **PROCEDURES**

1. The donor must complete Part I and mail the entire form (pages 1, 2 and 3) to the recipient institution with the contribution. The donor must complete a matching gift form for each contribution.
2. The recipient institution must complete Part II and return the entire form to the Fluor Foundation in Dallas, Texas, along with any required documentation noted on the application.

3. Upon receipt of certification from the educational institution, the Fluor Foundation will determine eligibility of the donor and institution. A letter and a matching check then will be sent to the institution. A letter also will be sent to the donor verifying that the Foundation has matched the contribution.

## DISBURSEMENT SCHEDULE

- Matching gifts are processed on a quarterly basis (December, March, June, and September). Additional dates may be added based on volume.
- The Fluor Foundation will accept applications for matching gifts up to 90 days from the date of the donor's gift.
- Matching gift forms received by the Fluor Foundation office after December 10 will be processed and credited toward the maximum total allowed per fiscal year in the upcoming fiscal year.

## PROGRAM FOCUS AND RESTRICTIONS

### GIFT MATCHING

Gifts must be actual contributions made, not pledged, by the eligible donor directly to an approved institution in cash or securities having a quoted market value. The Fluor Foundation will match donations designated to the following:

1. General funds (e.g., annual alumni giving fund, parents fund, building campaigns);
2. Academic programs and department support (e.g. student programs, classroom/lab supplies, school of engineering, faculty development);
3. Academic scholarships.

### INELIGIBLE DESIGNATIONS (but not limited to)

- Athletic or recreational buildings, programs, or scholarships
- Church tithes and other church-related financial commitments
- Contributions made jointly by several individuals or on behalf of ineligible participants
- Deferred giving
- Dues to parent, teacher, or student organizations; alumni groups ; fraternities or sororities
- Tuition, books, student fees, subscriptions, insurance premiums, or tickets
- University affiliated hospitals, arboretums, radio or television stations, museums, or presidential libraries

## STATEMENT

The Foundation reserves the right to determine whether any gift will be matched and is not obligated to fulfill an employee's pledge. Foundation trustees may periodically review and change program policies without prior notice or approve special matching gift designations.

*The Fluor Foundation, established in 1952, serves as a philanthropic arm of Fluor Corporation. Funded by contributions from the Corporation, the Foundation responds to the needs, challenges and opportunities of our complex society by providing financial assistance to various non-profit organizations and educational institutions.*