



ST PAUL TRAVELERS

ST. PAUL TRAVELERS FOUNDATION

MATCHING GIFTS OF MONEY APPLICATION
COMMUNITY ACTION AWARDS

Complete and send entire form with your contribution to the organization of your choice. Please type or print clearly.

TO BE COMPLETED BY PARTICIPANT

Form section for participant completion including fields for Applicant's Name, Home Address, Region/Office Name, Amount of Gift, and Program designation.

I understand that my gift will be used for the direct benefit of the organization, and this is an outright gift with no service benefit or item of value (other than an income tax deduction) accruing to the donor.

Signature of Applicant and Date of Gift fields.

TO BE COMPLETED BY NONPROFIT ORGANIZATION

Form section for nonprofit organization completion including fields for Name of Organization, Address, Phone No., E-mail Address, and Tax-Deductible Gift Amount.

By signing and returning this form, I certify:
• receipt of the above described gift
• that this institution/organization meets the nonprofit criteria established under Section 501(c)(3) of the Internal Revenue Code...

Authorized Representative fields including Mr./Ms. selection, Authorized Signature, Title, and Date of Gift/Received.

Attach a copy of the Certificate of Determination from the IRS related to 501(c)(3) and a copy of your mission statement for our files.

Please return your completed application to:
St. Paul Travelers Foundation
Community Action Awards
P.O. Box 7347
Princeton, NJ 08543-7347

## Community Action Awards

The Community Action Awards will be funded by St. Paul Travelers and are effective January 1, 2004. There are two parts to the Community Action Awards:

- **Matching Gifts of Money** — St. Paul Travelers will match up to \$500 of employee charitable contributions per year. The minimum grant matched will be \$50.
- **Matching Gifts of Time** — When an employee gives a day (24 hours in a calendar year) to a nonprofit, charitable organization, the employee can apply for a \$500 grant to that same organization. Employees can request one gift per year. The gift cannot be divided among various groups, so must go to one organization.

### Matching Gifts of Money

Minimum and maximum gifts that will be matched: You must contribute at least US\$50 to a nonprofit organization in order for your gift to be matched. The maximum amount that can be matched per employee in a year is US\$500. You may divide your contributions among more than one organization as long as each receives at least US\$50, and the total of all your gifts doesn't exceed US\$500 per year. The contribution you make must be directly from you and not from a donor fund.

Eligible gift to be matched: The money you give, and the funds matched by the Foundation, must go toward the nonprofit organization's direct benefit. That means your money should be useful to the nonprofit's operating budget, expenses for special projects, materials, equipment or any other need decided on by you and the eligible organization. The foundation's match cannot be used to pay an employee's personal pledge and it cannot provide a direct benefit to any company employee.

Your gift may be in cash (check or credit card) or in marketable securities and must have been made on or after January 1, 2004. You must apply for the gift within 12 months after it is given. If you donate securities, the Foundation will match the average price on the date of the employee's gift. Gifts are paid out quarterly.

### Matching Gifts of Time

Employees may apply for a US\$500 gift if they have given at least 24 hours as a direct service volunteer or as a volunteer board member at one organization during a calendar year. Employees do not need to contribute a monetary gift to be eligible. The award can go to one organization only, and must fit the program guidelines. Volunteer hours must be completed on or after January 1, 2004 and applications must be received by March 31 following the year volunteer service was donated.

Hours may not be bundled from more than one organization to make up the 24 hours of service. Hours cannot be combined among more than one employee to make up the 24 hours of service.

### General Guidelines for Both Programs

Employee Eligibility: All active and short-term disability employees, and either full- or part-time employees are eligible. Outside consultants, employees on long-term disability, directors, retirees and contractors are not eligible for the programs.

#### Nonprofit Eligibility:

- Must be a US nonprofit, 501(c)(3) or equivalent in another country;
- Or, a US federal, state or local government as provided by Section 170(c)(7) of the IRS code.
- Must attest that it does not discriminate against any person or group on the basis of age, political affiliation, race, national origin, disability, sexual orientation or religious belief.
- Must attest that the organization is in full compliance with federal anti-terrorism laws.

#### Examples of eligible organizations:

- Education: Public or private elementary, secondary, or technical/vocational schools, colleges, universities and PTA's;
- Human Services: Community clinics, health agencies, relief agencies, emergency shelters, support groups, and agencies for children and youth;

- Civic: Neighborhood associations, crime prevention and housing agencies, humane societies, and economic development organizations;
- Arts/Cultural: Theaters, public television and radio, performing arts groups, libraries and museums;
- Environmental: Conservation groups, wild life protection;
- Health: Hospitals, blood banks and disease specific organizations.

#### Contributions that would be ineligible:

- Bequests and dues to alumni groups, fraternities, membership fees, or subscription fees (tax deductible portion is matched if it is US\$50 or more);
- Insurance premiums, tuition, books or other student fees;
- Gifts made to pay admission to benefits or fund-raising events or to acquire other tangible benefits (tax deductible portion is matched if it is US\$50 or more);
- Gifts to religious organizations (for example: churches, seminaries, synagogues);
- Gifts to organizations that are ineligible to receive corporate contributions because of state or federal law, such as political groups;
- Gifts to activities that represent a conflict of interest for St. Paul Travelers;
- Gifts to fraternal organizations and private foundations;
- Gifts to educational institutions that limit enrollment to a particular faith;
- Gifts to federated drives (for example: the United Way), which are part of the company's payroll deduction plan;
- Pooled gifts made by groups (for example, departments, field offices, etc.) unless each person makes a gift that qualifies and submits their individual request;
- Gifts made by spouses/partners individually, or surviving spouses/partners of deceased employees;
- Gifts made by retired St. Paul Travelers employees or board members;
- Gifts made by employee-parents for the benefit of their own children (for example: individual scouting groups and individual youth athletic teams). Gifts must benefit the organization and not just the child; or
- Gifts to organizations that have discriminatory practices not in keeping with corporate diversity strategies.

### Gifts are Matched Quarterly

<u>Received by</u>	<u>Payment Date</u>
March 31	April 30
June 30	July 31
September 30	October 31
December 31	January 31

*Who can I contact if I have questions about the eligibility of the organization I want to contribute to or the Community Action Awards program?*

You may contact the Community Action Awards Program Administration office regarding questions about any aspect of the program via e-mail at [stpaultravelers@easymatch.com](mailto:stpaultravelers@easymatch.com) or via phone at 1-877-320-6796.

#### *Are there any program limitations?*

While we don't expect employee donations to exceed the amount the company budgeted for Community Action Awards, the Foundation reserves the right to prorate its matching gifts according to available funds. Also, the Foundation reserves the right to revoke, suspend or terminate the program at any time and has no obligation to match donations made after that time.

*\* If portion of gift is returned in form of gift certificate, tickets, etc., deduct value of item from donation to determine dollar amount of gift. (For example, a US\$50 gift with a US\$10 ticket gift certificate sent back to donor by an orchestral association results in gift amount of US\$40.)*