



Matching Gifts Program Guidelines

The William and Flora Hewlett Foundation offers the Matching Gifts Program to support the personal philanthropy and community engagement of its employees. Through this program, employee gifts to certain nonprofit organizations certified tax-exempt by the Internal Revenue Service will be matched by the Foundation on a two-to-one basis up to the limits specified below.

Eligible Participants

All eligible retirees and active regular Foundation employees working sixty percent of full-time equivalent or more and with six months or more of service are eligible to participate in the Matching Gifts Program.

Eligible Organizations

Participating organizations must be recognized by the Internal Revenue Service as tax-exempt under Section 501(c)(3) of the IRS Code and further designated as a public charity or as an instrument of a federal, state or local government as defined by Section 170(c)(1) of the Code.

Eligible organizations include, but are not limited to: educational institutions, medical and health organizations, cultural organizations, social service organizations including United Way, environmental and scientific organizations.

The Foundation will not match pledges or dues. The Foundation will not match donations to political campaigns and political advocacy organizations.

If you have questions about the eligibility of an institution to receive a matching gift, you should consult the Matching Gift Administrator in Finance before making a contribution.

Matching Limits

- Gifts are matched at 2:1 and 1:1 ratios, as designated by the participant.
- The minimum gift that qualifies for a match is \$25. The maximum donation per calendar year is \$10,000. Part-time employees who work between sixty and ninety-nine percent FTE (full-time equivalent) will have different maximum amounts allowed.
- For installment gifts, each match request must be submitted separately and meet the \$25 minimum gift requirement. If you make several contributions, gifts will be matched in the order received, up to the maximum annual donor limit for the calendar year. That limit is based on the date of the gift.

Eligible Contributions

- Must be a donation from your (the employee's/retiree's) personal funds, which has been paid directly to an eligible organization.
- Gifts must be in the form of check, credit card, or marketable securities with a quoted market value.
- Gifts of securities are valued based on the average of the high and low prices on the date of the gift. No other form of personal or real property will be matched.
- You may be asked to provide proof of your contribution in the form of a cancelled check, bank statement, credit card statement, or a transfer of stock certificate.
- You can request a match, right from the Matching Gifts Program Web site at www.easymatch.com/wfhf.

Ineligible Contributions

- Gifts made in lieu of tuition payments.
- Subscription, membership or any other fees for which benefits are received.
- Dues to alumni(ae) or similar groups.
- Insurance premiums, bequests, or life income trust arrangements.

- Gifts of real or personal property.
- Cumulative gifts from several individuals reported as one contribution.
- Contributions to political campaigns or to political advocacy organizations.
- Pledges, such as an irrevocable pledge made by the employee.

How Does the Program Work?

Online:

- Employees/retirees may request matching gifts through a quick, user-friendly, online request process at The William and Flora Hewlett Foundation Matching Gifts Program Web site at: <http://www.easymatch.com/wfhf>.
- Following receipt of the request, the program administrator will contact the organization to verify receipt of the gift. Eligible requests are processed on a monthly schedule; confirmed requests received by the 1st of the month will be processed by the last day of the month.
- Matching Gifts must be requested within one year of the gift date. Requests received after that time will not be honored. Receipt of gift must be verified by the organization. Unless otherwise described in the "Additional Notes" field when the gift is made, The William and Flora Hewlett Foundation grants are designated for unrestricted support.
- For more information, please visit the program Web site at <http://www.easymatch.com/wfhf>.
- The Web site contains program related information such as Guidelines, FAQs, as well as the ability to view personal giving histories and search for charitable organizations.
- If you have any questions, please contact:

The William and Flora Hewlett Foundation Matching Gifts Program
P.O. Box 8377
Princeton, NJ 08543-8377
Email wfhf@easymatch.com
Phone 1-866-661-6074

Administrative Conditions

The William and Flora Hewlett Foundation reserves the right to interpret, apply, amend or revoke the program and/or the guidelines at any time without prior notice. The policies and procedures described above are not conditions of employment nor are they intended to create or constitute a contract between The William and Flora Hewlett Foundation and any one or all of its employees/eligible retirees.

Organizations approved in the past may not qualify for The William and Flora Hewlett Foundation Matching Gifts Program in subsequent years if new information is received regarding the loss of their tax status or change in their mission or their programs that indicate the organization now falls outside of The William and Flora Hewlett Foundation Matching Gift Program guidelines. However, absent such new information, previously approved organizations are likely to be approved.