S&P Global

S&P Global Giving and Volunteering Programs
Overview and Guidelines

Matching Gift Program

The S&P Global Matching Gift Program provides the opportunity to help maximize the impact of employee charitable giving through corporate matched donations.

Employees can donate to eligible charities of their choice through CRConnect using a personal credit card (available to all global employees) or enrolling in payroll deductions (currently available to US employees only) and request a match for their personal contributions from US $25 to $5,000 (or the currency equivalent) per employee per calendar year. Employees can also donate directly to their charity of choice and request a match for their offline donations by uploading a receipt of contribution.

Disaster Relief Matching Gift Program

S&P Global's Disaster Relief Matching Gift Program is available year-round to maximize employees' personal contributions to eligible organizations engaged in disaster relief efforts.
This program is open to all S&P Global employees, and contributions do not count towards the annual maximum limit for other employee matching programs. S&P Global will match employee contributions one-for-one, up to US $5,000 (or the currency equivalent).

Employee Volunteer Grant Program

The Employee Volunteer Grant (EVG) Program is designed to recognize and encourage employee volunteer activities through financial support made by S&P Global to specific organizations in which employees are engaged and involved.

There are two EVG categories:

- **Individual Employee Volunteer Grant:**
  - Available to all eligible employees or retirees globally who have ongoing individual volunteer involvement with an eligible nonprofit organization.
  - S&P Global provides US $500 (or the currency equivalent) each calendar year, for an organization with which an employee/retiree volunteers a minimum of 50 hours.
  - Grants are limited in any calendar year to two organizations per employee/retiree.

- **Team Employee Volunteer Grant:**
  - Available to all eligible employees or retirees globally who participate in a team volunteer project to benefit an eligible nonprofit organization.
  - If three or more employees volunteer in a project, S&P Global provides up to US $1,000 (or the currency equivalent) to benefit the nonprofit organization to support any expenses related to the project.

Community Impact Program

Community Impact is S&P Global's signature employee volunteer initiative. Volunteer activities aim to advance the Corporate Responsibility (CR) Strategy. The CR strategy leverages the essential connections between our capabilities and the needs of society by focusing our efforts where our skills can make a real difference.

- **Bridging the Global Skills Gap:** Equip the global workforce with essential STEM and technology skills
- **Creating an Inclusive Economy:** Expand economic opportunities and advancement for women
- **Promoting a Sustainable Future:** Integrate ESG in the financial markets to promote sustainable investments and businesses

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Matching Gift and Disaster Relief Matching Gift Programs

I. Eligible participants

All active full-time/part-time employees and Board of Directors of the Company or any of its subsidiaries are eligible to participate. Retirees are also eligible for up to *three (3) years after they leave the Company and are no longer active employees or directors*.

The spouse of a deceased employee of S&P Global is eligible for a one-time gift match.

II. Eligible nonprofit organizations

U.S. organizations: An eligible organization in the U.S. must have a 501(c)(3) public charity status as designated by the U.S. Internal Revenue Service (IRS) and approved by the United Way's vetting process. Currently, the United Way recognizes charities categorized as 501(c)3 or 170(c)1 by the IRS, K-12 public schools as identified on the U.S. Department of Education NCES listing.

Canadian organizations: An eligible organization in Canada must be established and residing in Canada, and registered as a charitable organization with Canadian Revenue Agency (CRA).

Organizations outside the U.S. and Canada: For all other countries, the organization must be registered nonprofit charitable entities in their country, equivalent to the 501c3 status of U.S. organizations as vetted by United Way Worldwide.

Organizations and activities that are **NOT eligible** for matching include: religious, sectarian, political, lobbying, professional associations, fundraising organizations, private foundations, fraternities, sororities, marathons or similar events.

III. Selecting a nonprofit organization

- **Searching for a nonprofit in the database**: Once on CRConnect, the employee-donor will be asked to search for and identify the preferred nonprofit organization.

  Use the search feature to search the nonprofit by name. U.S. nonprofits can also be searched by the Employer Identification Number (EIN) and Canada charities can be searched using the Business Number (BN). The 'Advanced Search' feature helps in filtering and narrowing the charity search results.

- **What is an EIN or BN?**
  CRConnect requests an Employer Identification Number (EIN) when adding a new charity registered in the U.S. and a Business Number (BN) when adding a new charity registered in Canada.
  - U.S. EIN: A nine-digit number assigned by the Internal Revenue Service to a U.S.-based charitable organization. Every IRS-designated, tax-exempt nonprofit organization has its own EIN. You can obtain an organization's EIN by contacting them directly, visiting the organization's website or checking Guidestar.
  - Canada BN: A Canadian charitable registration number has 12 digits and 2 letters. It consists of:
    - Nine-digit Business Number
    - Two letters RR identifying registered charity status
    - One representing the reference number used to distinguish between internal divisions with the same program accounts.

- **What if my nonprofit is not listed? – Suggesting a nonprofit to be added to CRConnect**
  First try narrowing the search. Click the magnifying button on the right side of the navigation bar to go to the search page. Then, use the search bar and filter your search by the organization's EIN/BN, keyword or location. Make sure to remove all punctuation and abbreviations when you type in the name of the charity you are searching.

  If you cannot locate the nonprofit organization you seek, you can suggest that the nonprofit organization be added to the S&P Global-Your Cause database of charity partners:

  - Click on the "Help and Support" link at the bottom of the page, click on "Help" under your profile/name at the top right-hand side of the page or click on the magnifying glass. Click on "Suggest an org", complete the form and hit the Submit link at the bottom of the page.

  S&P Global-YourCause customer advocates will research and help locate the organization for you, and then provide steps on either how to add the organization to the database or provide you with the reason for the organization's ineligibility.

  Employees giving to organizations in the U.S. and are not able to find their nonprofit in the database will receive an email from YourCause (after completing the "Suggest an org" form) that includes instructions on how the nonprofit should register in Guidestar, a national U.S. charity database. Please forward those instructions to your nonprofit so that the nonprofit can submit the requisite documentation and become match-eligible.

  The employee should check back with the S&P Global-YourCause website periodically to see whether the nonprofit organization has been added to the charity database and thus become eligible to receive donations and matching funds.

  Employees giving to organizations outside the U.S. that are not already in the CRConnect database will also first start by completing the "Suggest an org" form. Once that is submitted, YourCause will reach out to the charity to request the required documentation to be included in the database. You will be copied on this correspondence so as to monitor the process and know if and when your organization is finally added to the S&P Global-YourCause database.

  The submission of a new nonprofit organization does not mean the organization will automatically be approved to receive online donations. A nonprofit has to be a U.S. 501(c)(3) registered nonprofit in the U.S., the Canadian equivalent or independently vetted by YourCause in coordination with its vetting partner United Way Worldwide to receive corporate matching funds. This process could take several weeks to finalize, depending on how quickly the organization responds to YourCause's request for documentation. Please keep checking back with the YourCause platform (visit your giving profile) to see if and whether your nonprofit organization has been added to the database.

- **Requesting help to find or include your favorite charity in the database:** If you believe your organization has been left out in error, please have your organization reach out to our team at charity@yourcause.com and we will gladly walk them through the procedure for joining our database.

- **What is a Charity Page?**

A Charity Page is an informational page where donors or volunteers can view a charity's mission statement, contact information and more. A charity page is also where employees go to make a credit card donation to the charity of their choice.

IV. How to make a personal donation to an eligible nonprofit organization through CRConnect?

- **Making a credit card donation**: For donations made through CRConnect, the employee will search for and select the nonprofit organization to receive the donation, click on 'Make a New Donation', select 'Credit Card' as the method of payment, enter the donation amount and designation and check out by applying for a corporate matching gift. The employee can select privacy information setting, enter personal credit card details, and complete the donation and matching gift request. YourCause will disburse the funds to the charity at the end of the month.

  A flat fee of 2.4% for credit card transactions will be deducted from the total donation. YourCause takes no percentage of any donations for profit. For example, if an employee donates $100, the charity will receive $97.60. However, total donation of $100 is tax deductible.

- **Enrolling in payroll deductions (currently available to U.S. employees only):** U.S. employees can also choose to set up a one-time or recurring payroll deduction as a way to make their personal donation to an eligible nonprofit organization.

  If an employee chooses recurring payroll deduction, the donation amount will come out of their paycheck each pay period. This will automatically continue year after year, unless the deduction is canceled or edited on the site. Please allow 30 days for all changes to be processed. It can take 1 or 2 pay periods for a payroll deduction to take effect once it has been scheduled on the site. Processing the donation to the charity will begin after the close of the month that the deduction was made. If the employee leaves the Company, deductions will be included in their last paycheck and then automatically canceled.

  For donations made through CRConnect, the employee will search for and select the nonprofit organization to receive the donation, click on 'Make a New Donation', select 'One Time Payroll' or 'Recurring Payroll' option, enter the donation amount and designation and check out by applying for a corporate matching gift.

  To view the scheduled payroll deductions that have not yet been taken out of the paycheck, please review the 'Donation Activity' section of your My Giving page.

V. Requesting a corporate matching gift

- **Requesting a corporate match after making a personal donation through CRConnect:** Employees can choose to donate to an eligible nonprofit organization directly through CRConnect. Review the two ways in which an employee can make a personal donation to the nonprofit. After entering the donation amount and designation, you will be prompted to 'Apply Match and Checkout'.

  Select the Match Program you would like to use: 'Regular Matching Gift Program' OR 'Disaster Relief Matching Gift Program'. If you select Disaster Relief Matching Gift Program, enter the disaster relief effort you are supporting through this request. Read and agree to the affirmation statement, apply for match and click 'Next Step'. Once you hit 'Confirm and Finish', your match request will be recorded.

- **Requesting a corporate match after making a donation directly to the organization**: If an employee has already made their donation directly to the nonprofit, they may request a corporate match within 90 days of the date of the donation. Begin by searching for and selecting the nonprofit organization, then click on ‘Log an Offline Donation’. Enter donation amount, donation date, type of donation, add a designation, upload proof of donation or receipt, add to cart and checkout. Proceed to ‘Apply Match and Checkout’.

  Select the Match Program you would like to use. ‘Regular Matching Gift Program’ OR ‘Disaster Relief Matching Gift Program’. If you select Disaster Relief Matching Gift Program, enter the disaster relief efforts you are supporting through this request. Read and agree to the affirmation statement, apply for match and click ‘Next Step’. Once you hit ‘Confirm and Finish’, your match request will be recorded.

VI. Matching limit

The Regular Matching Gift Program is available year round and runs on the calendar year from January 1st to December 31st. The minimum contribution to an eligible organization that the Company will match is US $25 (or the currency equivalent). The maximum total of an employee’s contribution that the Company will match each calendar year is up to US $5,000 (or the currency equivalent).

The Disaster Relief Matching Gift Program is available year-round and does not count towards the annual maximum limit for other employee matching programs. Matching requests must support disaster relief efforts undertaken by eligible nonprofit organizations. The minimum contribution to an eligible organization that the Company will match is US $25 (or the currency equivalent). The maximum total of an employee’s contribution that the Company will match each calendar year is up to US $5,000 (or the currency equivalent).

The amount may be divided among different eligible organizations or given to a single organization. Limits are based on the date the gift was made and not the date the matching gift was processed. Matching gift requests for offline donations must be received within 90 days from the date the gift was made.

VII. Processing

- **Matching gift processing timeline**
  Organizations will receive employees’ donation based on the processing cycle for each donation type. The *estimated* timing for each type is listed below:

Donation Type	Process	Estimated total processing Timeline
Credit card	Once credit card donations are made, the funds are held in the S&P Global bank account until the end of the month, when all approved employee donations are deployed.	**Monthly,** 45-60 days after the close of the month
One-time payroll deductions	Payroll deductions take about 1-2 pay periods to take into effect after being scheduled on the site. Processing donation to the charity will begin after the close of the month in which the deduction was made.	**Monthly,** 45-60 days after the close of the month
Recurring payroll deductions	The donation amount will come out of employee’s paycheck each pay period. This will automatically continue year after	**Monthly,** 45-60 days after the close of the month

	year, unless the deduction is canceled or edited by the employee on the site. Payroll deductions take about 1-2 pay periods to take into effect after being scheduled on the site. Processing donation to the charity will begin after the close of the month in which the deduction was made.	
Matching gift	Matches approved by Corporate Responsibility within the month will be included in that month's disbursement cycle at the end of the month.	**Monthly,** 30-45 days after the close of the month in which the matching request is approved

- **Transaction fees:** CRConnect does not deduct any portion of the employee's donation for processing or administrative-related expenses. Once employee's donation reaches the recipient organization, they may deduct a portion of the donation for their specific organization's administrative or operating expenses. For information on these details, please contact your recipient organization directly.

  For credit cards, a flat fee of 2.4% credit card transactions will be deducted from employee's total donation. YourCause takes no percentage of any donation for profit. For example, if an employee donates $100, the charity will receive $97.60. However, total donation of $100 is tax deductible.

- **Tax acknowledgements**
  - **Donations to U.S. charities**: YourCause is recognized as a fiscal agent of United Way Worldwide (UWW). This allows YourCause to provide tax acknowledgements for U.S. credit card donations directed to UWW-recognized charities.

    The United Way recognizes charities categorized as 501(c)3 or 170(c)1 by the IRS, K-12 public schools as identified on the U.S. Department of Education NCES listing, and organizations listed on the Catholic Directory. The tax acknowledgements will be available for retrieval from the donation history area of CRConnect.

    To review the documentation of your donations for tax purposes, click the hyperlinked status of your donation, then click the 'View Records' option. If you have multiple donations and would like a summary of your donations, please scroll to the 'Donation History' section, click the drop down for 'Export Summary', and select the year you would like to view.

  - **Donations to Nonprofits outside the U.S**.: Non-U.S. donation receipts are not provided by CRConnect and should be retrieved by contacting the recipient nonprofit organization directly.

- **Check the status of a donation and matching gift request:** You can view the status of your donations by clicking 'Give' at the top of the CRConnect home page, then 'My Giving' on the navigation bar. If your donation is still pending approval, processing, or in transit to your organization, then it will be listed in the 'In Process' section. Once the donation has been deposited by the organization its status will be 'Complete' under the Donation History portion toward the bottom of the page.

- **View giving history and past donations:** To view your past donations, go to the CRConnect home page. Click 'Give' at the top of the page, then click 'My Giving' on the navigation bar. Scroll to the bottom of the page and find the 'Donation History' section.

This section represents all of your donations that have already been processed out to the organization. Here, you can use the drop-down menu to select the specific dates you would like to review.

Employee Volunteer Grant (EVG) Program

I. EVG Categories

- **Individual EVG:** An eligible employee may apply for an Individual EVG of US $500 (or the currency equivalent) in each calendar year, for an organization with which the employee volunteers regularly for at least 50 hours. Individual EVGs are limited in any calendar year to two organizations per employee.
  Individual EVGs recognize time spent in your ongoing volunteer involvement activities such as board membership, administrative or technical assistance.

- **Team EVG**: A team of three (3) or more employees who participate in a team volunteer project to benefit an eligible nonprofit organization may apply for a Team EVG of up to US $1,000 (or the currency equivalent) for that organization.

  The Team EVG funds must be used only for the specific project for which grant is being requested, and may not be used for general operating purposes.

II. Eligible participants

All active full-time/part-time employees of the Company or any of its subsidiaries are eligible to participate. Retirees are also eligible for up to *three (3) years after they leave the Company and are no longer active employees or directors*.

III. Eligible nonprofit organizations

U.S. organizations: An eligible organization in the U.S. must have a 501(c)(3) public charity status as designated by the U.S. Internal Revenue Service (IRS) and approved by the United Way's vetting process. Currently, the United Way recognizes charities categorized as 501(c)3 or 170(c)1 by the IRS, K-12 public schools as identified on the U.S. Department of Education NCES listing.

Canadian organizations: An eligible organization in Canada must be established and residing in Canada, and registered as a charitable organization with Canadian Revenue Agency (CRA).

Organizations outside the U.S. and Canada: For all other countries, the organization must be registered nonprofit charitable entities in their country, equivalent to the 501c3 status of U.S. organizations as vetted by United Way Worldwide.

Organizations and activities that are **NOT eligible** for matching include: religious, sectarian, political, lobbying, professional associations, fundraising organizations, private foundations, fraternities, sororities, marathons or similar events.

IV. How to apply for an EVG

- **Individual EVG**: Log in to CRConnect and click on 'Volunteer' tab. Click on 'Individual Activity'. Enter details of your individual volunteering efforts including hours, event name, participation date, description of volunteering activities, select an organization and click 'Done'. If you have dedicated more than 50 hours of service and have not exceeded the Individual EVG allowance of two organizations per calendar year, you will be prompted to apply a $500 grant to the organization. Check the box under 'Select' at the end of the pop-up page and hit 'Submit'.

  YourCause will reach out to your nonprofit organization to verify your volunteering efforts.

- **Team EVG:** The Team EVG application is hosted on the YourCause GrantsConnect portal. Please follow the steps below prior to accessing the Team EVG application:

  Once you are in the application, search for and select your organization. Complete the application by entering team leader, nonprofit organization, project and budget information. Check the box at the end of the application to agree to the terms of the program guidelines and upload a confirmation letter or email from the nonprofit organization verifying your volunteering project details and submit your application.

V. What if my nonprofit is not listed? – Suggesting a nonprofit to be added to the S&P Global-YourCause site

- **Individual EVG:** On CRConnect, click on ‘Volunteer’ and then ‘Log Hours. When you have to select an organization and you are unable to find your organization after advanced search, click on the "Help and Support" link at the bottom of the page or click on “Help” in the dropdown under your profile/name at the top right-hand side of the page. Click on "Suggest an org”, complete the form and hit the Submit link at the bottom of the page.

  S&P Global-YourCause customer advocates will research and help locate the organization for you, and then provide steps on either how to add the organization to the database or provide you with the reason for the organization’s ineligibility.

  

  Employees giving to organizations in the U.S. and are not able to find their nonprofit in the database will receive an email from YourCause (after completing the “Suggest an org” form) that includes instructions on how the nonprofit5 should register in Guidestar, a national U.S. charity database. Please forward those instructions to your nonprofit so that the nonprofit can submit the requisite documentation and become match-eligible.

  The employee should check back with the S&P Global-YourCause website periodically to see whether the nonprofit organization has been added to the charity database and thus become eligible to receive donations and matching funds.

  

  Employees giving to organizations outside the U.S. that are not already in the CRConnect database will also first start by completing the “Suggest an org” form. Once that is submitted, YourCause will reach out to the charity to request the required documentation to be included in the database. You will be copied on this correspondence so as to monitor the process and know if and when your organization is finally added to the S&P Global-YourCause database.

  The submission of a new nonprofit organization does not mean the organization will automatically be approved to receive grants. A nonprofit has to be a U.S. 501(c)(3) registered nonprofit in the U.S., the Canadian equivalent or independently vetted by YourCause in coordination with its vetting partner United Way Worldwide to receive volunteer grants. This process could take several weeks to finalize, depending on how quickly the organization responds to YourCause’s request for documentation. Please keep checking back with the YourCause platform (visit your giving profile) to see if and whether your nonprofit organization has been added to the database.

- **Team EVG:** Once you are in the application on the YourCause GrantsConnect portal, you begin your application by searching for and selecting your organization. If you cannot find your organization, click on ‘Can’t find your organization. Add it here’ and enter the details of the organization and submit it. If you add a new organization, it must go through a detailed vetting process before your application can be approved. However, you may proceed to complete your application upon adding the new organization.

The submission of a new nonprofit organization does not mean the organization will automatically be approved to receive grants. A nonprofit has to be a U.S. 501(c)(3) registered nonprofit in the U.S., the Canadian equivalent or independently vetted by YourCause in coordination with its vetting partner United Way Worldwide to receive volunteer grants. This process could take several weeks to finalize, depending on how quickly the organization responds to YourCause’s request for documentation.

VI. Processing

- **EVG processing timeline** - EVGs are processed on a monthly basis, depending on when the grant is approved. Processing timeline is 45-60 days after the close of the month.

- **Check the grant status**
    - **Individual EVG** – Once you are logged in to CRConnect, click on ‘Volunteer’ tab, ‘My Volunteering’ and ‘My Grants’ to review status of the Individual EVG.
    - **Team EVG** – Sign in to CRConnect, click on ‘My Applications’ and ‘Grant Awards’ to review the status of the Team EVG application and grant awards.

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Volunteer Management Tool

I. Log volunteer hours

You can log your past and upcoming volunteer events and service hours (both team and individual). To log personal hours, click ‘Volunteer’ at the top of the CRConnect home page, then click ‘Individual Activity’ on the navigation bar.

II. Create a volunteer event

To create a team event and for recruiting purposes, click ‘Volunteer’ at the top of the page, then click ‘Create Event’ on the navigation bar. Only admins have the Create Event option. If you’d like to create an event, please contact cr@spglobal.com.

- **Creating a recurring volunteer event:** On the ‘Log New Hours’ or ‘Manage Event’ page, check the box next to ‘Event Repeats’ within the ‘Date & Time’ section. When setting up a recurring event please be sure to set the start and end date for a single occurrence, and then select the option to have the event repeat for your desired number of occurrences.
- **Creating a set of shifts for the event:** You can add one or more shifts to your event. Once you have created your event, click ‘Add Details.’ On this page, click ‘Activate Shifts and Activities’ and create as many shifts as needed for your event.
- **Adding an organization:** It is required that you add an organization to ‘Log New Hours’ or ‘Create an Event.’ You can either click on the drop-down list of your Favorites (saved organizations) or you can ‘Search For a New Organization.’ If you are having difficulties finding your organization, hover over your name at the very top right of the page, click the ‘Help’ link, and then click ‘Suggest an Org.’ Fill out the form and a YourCause Client Advocate will help locate the organization for you, provide steps on how to have the organization added, and/or provide you with a reason for the organization’s ineligibility.
- **Adding a custom question to the event:** You can add Custom Questions to your event. Once you have created your event, click ‘Add Details.’ On this page, click ‘Activate Questions/Fields,’ and add your questions one-by-one. You can choose to make them required or optional. View participant answers through the ‘Participant Export’ report.

III. Search for and sign up for volunteer opportunities

Simply click ‘Volunteer’ at the top of the page, and then click ‘Explore Events’ on the navigation bar.

You can narrow down your search by:

- Keywords
- Location
- Date Range
- Virtual Events (events that do not specify a physical address)
- Ongoing Events (events without an end date)
- Availability (Events that still need volunteers)

To sign up for an event, click on the event and click ‘Sign Up’. Enter shifts and/or number of hours you plan to participate (if applicable). Read the event disclaimer policy. By clicking ‘Confirm and Submit’, you are signed up to participate in the event.

IV. Include family members and friends

Please confirm with your nonprofit partner and the volunteer event organizer that the event is appropriate for family members, friends or customers to attend. You may need to add them to the

Event page, and/or they may need to sign any waivers and follow the guidelines for volunteering set by the nonprofit organization, if applicable.

V. Volunteer photos

The Event Organizer can upload a single photo to the volunteer event through the ‘Add Details’ function. If you are an event participant and have a photo you would like to upload, please contact your Event Organizer.

VI. View upcoming volunteer events and event history

Go to ‘Volunteer’ tab, click ‘My Volunteering’ tab. You can view your upcoming events and event history by clicking on the respective tabs. The dropdown under each event provides you the option to edit participation, add to calendar and delete participation.

VII. Promote the volunteer event

If you created an event, you can click on ‘Event Management’ tab under ‘Volunteer’. Go to the event you created and click on ‘Share with co-workers’. Copy the link of the event and share via email, text or any other form of communication.

If you signed up to volunteer in an event, click on ‘My Volunteering’ tab under ‘Volunteer’. Go to the event you signed up for and click on ‘Share with co-workers’. Copy the link of the event and share via email, text or any other form of communication.