



## The Rockefeller Foundation Matching Gift Program Rules and Procedures

The Rockefeller Foundation offers a generous matching gift program to encourage its staff, trustees and finance committee members to make personal donations to the charities of their choice. The Foundation will match donations on a 3:1 basis, up to \$90,000 per individual per calendar year (matching a total of up to \$30,000 employee funds per year of contributions made by an eligible trustee or staff participant). The Office of Grants Management has responsibility for administering the program and monitoring compliance with the program's rules and procedures.

It is important to note these program conditions:

- This program is discretionary and subject to change or cancellation at any time by the Foundation.
- All matching gifts are within the Foundation's discretion and the Foundation has the right to deny any matching gift request as well as to seek or review additional information about the request.
- The Foundation cannot guarantee the confidentiality of matching gift requests or payments.

In order to participate in the Foundation's matching gift program each calendar year, you must acknowledge and agree to adhere to the rules and procedures set forth in this document.

### Procedures

1. All requests are to be made online at <https://www.easymatch.com/rockefellerfoundation>
2. Gifts both of cash and of publicly-traded stock can be matched. The minimum donation that will be matched is \$20.
3. Gifts made out of donor advised funds to an eligible charity can be matched.
4. To apply for a matching gift, send your gift to the organization and then go to the program website to search for the organization in the organization search page. If you cannot find the organization, you will be given the opportunity to write in the organization. The organization will be given an opportunity to certify the gift was made.
5. The program will generally review matching gift applications on a quarterly basis and, if approved, will be paid. There is no expedited processing for this program.
6. The Rockefeller Foundation Matching Gift Program maintains data on each matching gift request it receives and on request can provide you with information about receipt of your matching gift requests. You can utilize the giving history page to monitor how much of your \$30,000 limit is used. The website will not allow you to go above your maximum.

## Individuals Eligible to Participate in the Program

1. The following individuals are eligible to participate in the matching gift program:
  - o All current, regular full- and part-time staff members;
  - o Current members of the Board of Trustees or its Finance Committee;
  - o Former members of the Board of Trustees, until the end of the calendar year following the year in which they resigned or retired from the Board.
2. Participation is contingent on each participant's certification that she or he has read and understands and will comply with these rules and procedures.

## Use of the Matching Funds

- Neither you nor any member of your family may receive a financial benefit in return for your donation or the Foundation's match, and only the tax-deductible portion of your gift may be matched.
- Where you have restricted the use of funds for a particular purpose, the matching funds will be given the same restriction, provided that it is indicated on the application.
- The recipient is informed, via the application, which Foundation funds must be expended solely for religious, charitable, scientific, literary, or educational purposes and may not be used, among other restrictions, for lobbying purposes, to influence the outcome of elections, or for voter registration drives.

## General Restrictions and Conditions

- All donations to be matched must be from your personal assets (or those assets shared with your spouse or domestic partner) and provided on your own behalf.
- If you wish to have a donation made from your donor-advised fund matched by the Foundation, you must certify that during the calendar year in which the donation to be matched was made that you contributed at least the amount of such donation from your personal assets (or those assets shared with your spouse or domestic partner).
- Matching gift amounts may not be used to fulfill a pledge made by you or any member of your family.
- Requests must be received by the Foundation from the recipient organizations no later than June 30 of the year following the year in which your donation was made.
- Failure to comply with the rules and procedures of the matching gift program could result in your being barred from participating in the program. In such cases, the Foundation may also take other legal action and, in the case of employees, may take disciplinary action up to and including termination of employment.
- The Office of Grant Management has the final say in all decisions regarding the matching gift program

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