



MATCHING GIFT POLICY

DATE POLICY UPDATED: January 2011

The Cupertino Electric, Inc. Matching Gift Program supports employees in their commitment to building better communities through philanthropic efforts. Cupertino Electric will match dollar for dollar up to \$5,000 per calendar year for each regular full time office employee and for each union employee with a minimum of 5,000 hours of continuous service with CEI. Specific organizations are entitled to receive up to \$25,000 in matching funds per calendar year.

In order to request a matching gift, please complete the Matching Gift Form and attach a copy of the receipt of donation from the charitable organization. Also provide a copy of the charitable organization's IRS determination letter, certifying that the organization qualifies under Section 501(c)(3) of the Internal Revenue Code.

Note:

- The interpretation, application and administration of the Matching Gift Program shall be determined by the Employee Giving Committee and the decision is final.
- In all cases, the company matching gift will be made directly to the non-profit.

Below is a description of the types of donors, gifts, organizations and programs that are eligible and ineligible for Cupertino Electric's Matching Gift Program.

Eligibility:

Donors:

- All CEI regular full time non-union employees are eligible to participate in the matching gift program.
- All CEI union employees with a minimum of 5,000 hours of continuous service.

Gifts:

- All gifts will be matched one for one. The minimum gift is \$25. Gifts must be personal contributions in the form of cash (personal check or credit card)
- For group donations and fundraising such as walk-a-thon's (i.e. Team in Training, Avon Walk for Breast Cancer, etc.), Cupertino Electric may contribute up to \$500 towards the employee's fundraising commitment.
- No goods or service may be received by the employee, the employees' family or other designated individuals in exchange for the solicited matching gift
- All matching gifts funds will be restricted to the same purpose as the employee's own gift.
- Gifts must be paid, not pledged
- Matching Gift forms must be received by Cupertino Electric within six months of the date the donor made the gift in order to be considered for matching
- Financial contributions must be charitable contributions that can be deducted by individuals for federal income tax purposes; therefore the organization must be a recognized 501(c)(3) organization.

Organizations:

- The recipient organization must be tax-exempt, nonprofit, and hold a current Section 501(c)(3) determination letter from the Internal Revenue Service. The organization must be classified by the IRS as a public charity. The donation must qualify under Section 170(c) (3) of the Internal Revenue Code.
- The organization/project being funded must have a nonreligious primary purpose. Cupertino Electric will only process and match employee gifts to religious organizations when the gift is designated to an ongoing secular community service program sponsored by these organizations which is open to all persons and does not propagate a belief in a specific faith. The benefits of this gift must not be limited exclusively to the organization's members
- The organization/project must serve the community at large
- The organization must provide audited financial statements upon request and must not spend more than 30 percent of the support revenue for overhead costs and fund-raising expenses

Ineligibility:

Donors:

- Gifts from spouses, other family members
- Payments for which donors, their families, or other individuals designated by donor receive a direct benefit; this includes payment for services, tuition, books, and student fees

Gifts:

- Advertising
- Annuities, charitable remainder trusts
- Bequests
- Deferred gifts
- Fund-raising event tickets and dinners
- Gifts given to or through a third party
- Gifts to fulfill pledges, tithes or other religious-related financial commitments, legal obligations, repayment of loans, subscription fees, membership dues
- Gifts to individuals
- Insurance premiums
- Multiyear projects
- Volunteer service for an appointed or elected government board

Organizations:

- Organizations whose primary function is advocacy or litigation
- Organizations/projects that are religious or political in nature or promote a hobby
- Organizations/projects that do not serve the community at large
- Organizations that are membership-based (booster clubs, fraternities, sororities)
- Organizations that discriminate on the basis of age, disability, religion, ethnic origin, gender, or sexual orientation
- Athletic teams
- Seminaries
- Higher Education
- Pre-College/K-12

Programs:

- Athletic programs, athletic scholarships, tournaments
- Marching bands
- Recreational activities
- Youth and adult sports leagues



MATCHING GIFT REQUEST

Please complete the information below and attach a copy of your donation receipt and a copy of the charitable organization's IRS determination letter certifying that they qualify as a public charity under Section 501 (c) (3) of the Internal Revenue Code.

Gift Amount \$ _____ to
(Minimum Gift \$25.00)

Name of Recipient Institution/Organization

Located in _____
City State

On _____
Date of Gift (No later than six months from matching gift request)

Form of Gift: _____ Personal Check _____ Credit Card

I wish the amount of \$ _____ to be matched by
Cupertino Electric, Inc.

I certify that the gift described above is a personal contribution that has been made voluntarily and that my gift fully complies with the provisions set forth in the program guidelines. I also certify that my gift does not directly benefit me, members of my family or any other person(s) designated by me.

Signature of Donor Date Signed

Social Security No. or Employee Identification No.

Last Name First Name MI

Home Address

City/State/ZIP

Company/Department

Daytime Telephone E-Mail Address

Please send the completed form to:
Cupertino Electric, Inc.
Human Resources
Matching Gift Program
1132 North Seventh Street
San Jose, Ca 95112