

Deloitte Foundation Matching Gifts Program – Frequently Asked Questions

How can I apply for a matching gift?

You can apply for match online via DeloitteNet by typing “matching gifts” in the search field. All active personnel are required to use the online system – do not send in hard copy forms. Retired partners/principals and managing directors without access to DeloitteNet will continue to use the hard copy matching form.

What if I recently submitted a hard copy matching gift form for a contribution that I made to a college/university?

The hard copy form will not be processed. Please apply for match via DeloitteNet by typing “matching gifts” in the search field.

Once I enter my gift online, what happens?

You will receive an email receipt after you submit your match online. The Deloitte Foundation matching gifts coordinator will review the PPMD/employee request and verify the gift online with the college/university, and authorize payment of matching contributions in accordance with Program guidelines. There is no further action on your part.

How do I check the status of a matching request?

You can check the status of your match and view your giving history via DeloitteNet by typing “matching gifts” in the search field. Then click on “Check My Matching Gifts”. After you press “I Agree” on the guidelines page, you will be taken to the donor home page. See the box titled “Your Giving History”, sample table below.

| ctio n | Organization | Type | Description | Status |
|--------------|----------------|----------------|------------------------------|----------------------------------|
| Cre e New | Boston College | Matching Gifts | <u>\$250.00</u> <u>on</u> | Gift not yet confirmed by school |

How do I delete/edit an online matching gift request?

If you have erroneously submitted a duplicate request, submitted a request for the wrong school, or have an error in your submission, please contact matchinggifts@deloitte.com.

Does the Foundation match eligible contributions to all U.S. baccalaureate and graduate degree granting colleges and universities?

Yes

Does the Foundation match contributions made to other philanthropic organizations outside of higher education?

No. Our Foundation's matching gifts program currently supports U.S. higher education. Accordingly, our matching program is focused solely on U.S. colleges and universities.

Does the Foundation match gifts made through the United Way?

No. Donors must contribute directly to the school.

I am making monthly installment gifts to a university. How should I apply for match for the installments?

You can combine all your FY17 payments (dated 6/1/16 – 5/31/17) and apply for match during the month of your last payment. Please only apply for match for gifts that have been paid to the school.

I am a new employee. Am I eligible to apply for a matching gift?

As soon as employees begin their work with the Deloitte U.S. Firms, the Foundation is there to support any eligible contribution they make to higher education on or after their start date.

I plan to make a gift now, but will leave the firm next month. Is my gift still eligible for matching?

If you are actively employed at Deloitte at the time of your gift, and the gift is designated to an academic program, then it is eligible for matching.

What is the matching gifts program year?

The program year runs June 1 to May 31 each year. Matching gift checks are issued one time annually each October.

Is there an annual deadline for the matching gifts program?

Yes, you must apply online for match by May 31 in order to have your gift matched the following October.

What is the fiscal year donor maximum match?

Each fiscal year (June 1 to May 31), the maximum match for each donor per fiscal year is \$7,500 for non-strategic school contributions AND \$25,000 for strategic school contributions (our top national/regional sources of entry-level talent). Therefore, each fiscal year, each donor could have a maximum match of \$32,500 grand total. The [list of strategic schools](#) is posted to the matching gifts eligibility section on DeloitteNet. This list is determined in conjunction with national evolving workforce (talent acquisition) leadership.

Example: I will contribute \$15,000 this fiscal year to the accounting department at the University of Pennsylvania (a strategic recruiting source) and another \$8,000 to a non-strategic school. How much will the Foundation match?

The Foundation will match the entire \$15,000 to the University of Pennsylvania AND the \$7,500 to the non-strategic school.

Example: I plan to contribute \$10,000 to Duke University and \$15,000 to Cornell University (both strategic recruiting sources) and \$7,000 to a non-strategic school. How much will the Foundation match?

The entire \$10,000 to Duke University and the entire \$15,000 to Cornell University will be matched as the total of both donations is \$25,000 which is the maximum match to strategic schools per donor per fiscal year. The Foundation will also match the entire \$7,000 to the non-strategic school.

Example: I plan to give \$15,000 to UCLA and \$15,000 to New York University (both strategic recruiting sources). I also plan to give \$8,000 to a non-strategic school. How much of my donations will be matched?

Up to \$25,000 per fiscal year, per donor will be matched in total to strategic schools. You would need to indicate in the Matching Gifts system how you would want your donation matched to each strategic school. In addition, only \$7,500 of the \$8,000 to the non-strategic school would be matched.

Example: I will contribute \$10,000 this fiscal year to the business school at my alma mater (a U.S. university that is NOT on the list of strategic schools). How much will the Foundation match?

Your \$10,000 gift will be matched up to \$7,500 (the fiscal year donor maximum).

What is the minimum gift amount eligible for matching?

The individual minimum per school, per fiscal year, that is eligible for matching is \$50 for active employees, and \$250 for active and retired partners/principals/managing directors.

When does my gift get matched by the Deloitte Foundation?

The Foundation sends out its matching gift checks annually in October.

What is the “\$1,000 aggregate match minimum”, which is mentioned in your guidelines?

The total approved match for eligible gifts made by U.S. Deloitte personnel to your university during FY2017 (6/1/16 – 5/31/17) must total \$1,000 or more in order for the school to be eligible for a matching gift check. You will receive an email in September 2017 confirming the matching status of your gift and if your school reached the \$1,000 aggregate match minimum.

Example: If I donate \$250 in FY2017 to a U.S. college and I am the only Deloitte U.S. Firms employee who submits a matching form for that school, will my gift still be matched?

No. The Foundation will issue a matching check to a school only if total match from personnel of the Deloitte U.S. Firms reaches or exceeds \$1,000 for that particular school during the fiscal year. If you are the only donor to that school in FY'17 and the school's total match is \$250, a matching check will not be cut to the school. Alternatively, if you and three other Deloitte professionals each contribute \$250, then the school would reach the \$1,000 aggregate match minimum, and a matching check would be cut to the school.

Can I apply for match for gifts made before FY2017?

The Foundation matches gifts made during FY2017 (6/1/16 – 5/31/2017) and the previous fiscal year, FY2016 (6/1/15 – 5/31/16).

I applied for match online a few months ago. Why is my gift still in pending status?

The Foundation receives thousands of matching gift requests during the fiscal year. Your gift will be reviewed by the Foundation and the school by mid-June 2017. An email confirming the status of your gift will be sent to you in September 2017.

If I have any additional questions about the Matching Gifts Program, who should I contact?

Contact the Deloitte Foundation [matching gifts coordinator](#) if you have any additional questions about the [Matching Gifts Program](#) guidelines and process. For IT-related issues, please contact the Call Center at 1-800-DELOITTE (1-800-335-6488) for assistance.