

Gates Foundation Frequently Asked Questions

What is the Employee Matching Gift Program?

The Employee Matching Gift program is designed to give encouragement and assistance to accredited educational, community and cultural organizations, and to provide an incentive for employees to make regular contributions to the eligible organizations of their choice. All employee contributions for which a match is sought will be kept confidential.

How do I submit a Request?

There are two ways to submit a matching gift request:

1. To make your request online, click on the "Submit a New Request" link on the homepage of www.easymatch.com/gatesfoundation.
2. Enter your new **Employee ID** number. The first time you log in, you can leave the password field blank.

Please note that you should have received your new **Employee ID** via email on **January 6, 2011** or your start date for new employees. If you did not retain this email, please contact emg@gatesfoundation.org to obtain your new **Employee ID**.

3. To submit a paper request, go to www.easymatch.com/gatesfoundation and click on the "Download Forms" link on the homepage.
 - o The employee then should:
 1. Download the form (available as either a MS Word doc or Adobe pdf)
 2. Print out the form
 3. Complete Part A of the form
 4. Mail the original form, with the donation and any other necessary documentation, to the institution of your choice that meets the criteria listed in the guidelines. (Faxed copies will not be accepted.)
 - o The recipient organization should:
 1. Complete Part B of the original form
 2. The authorized officer of the recipient organization must verify the donation, sign the form and return the original form along with a copy of the organizations IRS determination letter to:

Bill & Melinda Gates Foundation
Employee Matching Gift Program
P.O. Box 3540
Princeton, NJ 08543-3540

The Foundation reserves the right at any time to determine whether a gift shall be matched and to change or terminate the employee matching gift program without notice.

Where can I find blank match request forms?

Match request forms may be downloaded from this website by clicking on the "Download Forms" link on the homepage or requested via phone at (866) 299-2589.

Who is responsible for the guidelines?

The Bill & Melinda Gates Foundation Human Resources department is responsible for establishing the program guidelines. The guidelines are reviewed on an annual basis. If you have any suggestions or questions about the guidelines, please send e-mail to gatesfoundation@easymatch.com.

What organizations are eligible for Matching Funds?

- Nonprofit organizations that are recognized by the Internal Revenue Service as tax-exempt and designated as public charities under section 501(c)(3) of the Internal Revenue Code.
- Federal, state or local government units as provided by sections 170(b)(1)(A)(v) and 170(c)(1) of the Code.

Eligible organizations include, but are not limited to, accredited colleges and universities, private and public elementary and secondary schools, public libraries, health and human service agencies, animal welfare organizations and environmental organizations.

What organizations are not eligible for Matching Funds?

- Payments for raffle tickets, benefits, meals, auctions at (or for) fundraising events, except to the extent the donor did not receive a benefit in exchange for his or her contribution. For example, if a foundation employee pays \$50 for admission to a charitable event, and the event organizer provides evidence that the value of the benefit to the donor (meal, etc.) is \$20, the foundation will match \$30 of the gift.
- Gifts to political or fraternal organizations, candidates or to support specific legislation.
- Payments that cover the costs of services, tuition, books and student fees.
- Payment of membership fees for which benefits are received, including memberships in athletic clubs, alumni associations, zoos, parks, museums, and other programs that primarily benefit the donor.
- Gifts to religious organizations. (However, the foundation will match a gift to a religious organization if the organization has a community social service program separate from its religious programs.) The donation must be directed to this social service program.
- Gifts made to donor advised funds or pooled gifts (gifts from several individuals reported as one contribution).

When is my request matched?

Eligible gifts are processed and matched to organizations on the following monthly schedule. Please note that the information below outlines the dates by which a recipient organization must confirm an employee's donation (Donation Confirmation Received date) in order for the matching gift to be paid (Match Paid date).

Donation Confirmation Received by:	Match Paid by:
February 1	February 28
March 1	March 31
April 1	April 30
May 1	May 31
June 1	June 30
July 1	July 31
August 1	August 31
September 1	September 30

October 1	October 31
November 1	November 30
December 1	December 31

The recipient organization must confirm an employee's cash, personal check or credit card contribution within one year of the date of the employee's contribution in order for it to be matched by the Bill & Melinda Gates Foundation Employee Matching Gift Program.

What is my match limit?

All employees on the foundation payroll are eligible to request a matching gift. The foundation will match employee contributions to eligible organizations at a rate of three dollars for every one dollar contributed, up to a maximum match of \$30,000 per year (i.e., employee contributions up to a maximum of \$10,000 per year).

The foundation will calculate the matching gifts by the date the employee made the donation. For example, a matching gift requested online and confirmed by the recipient organization (or original form received by our third party vendor from the recipient organization) by December 1 will be processed by December 31 as part of the final match of the year. An online request confirmed by the organization or original form received from the organization after this date will be matched the following year. However, the matching gift will count for the year in which the employee's donation was made.

Why does a school need to be accredited?

Accreditation is required because it is an equitable and cost effective way for us to ensure that the recipient schools meet and maintain a standard of quality.
