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Dollars for Doers FAQs

__Please Note__: The PwC Charitable Foundation, Inc. reserves the right to change or withdraw this program without notice. The interpretations and administration of the provisions of the program will be determined by The PwC Charitable Foundation Board of Trustees.

Q: What is the Dollars for Doers Program?

A: Dollars for Doers is a PwC Charitable Foundation program that provides grants directly to eligible nonprofit organizations (NPOs) where PwC partners, principals and staff volunteer a minimum of 25 hours. When 25 hours have been logged at an eligible NPO and verified in the volunteer profile application via Kcurve, the system will prompt the volunteer to submit the hours to the Foundation for final approval. The Foundation will match service hours donated to eligible organizations in 25 hour increments for a maximum of 100 hours (or $1,000) per volunteer per year. In the first year of the program beginning on June 1, 2012, the first five volunteers to reach 25 hours and submit their time to the Foundation will have their match rate (for the first 25 hours only) doubled to $20 per hour (or $500) and the opportunity to be featured in PwC News. The first five grant recipients are still limited to $1,000 per volunteer per year.

Q: Who is eligible to apply for a Dollars for Doers grant?
A: The program is open to all current PwC partners, principals and staff (including long-term international assignees) and current partners or staff on sabbaticals who work a minimum of 1,000 hour per year. Retired partners, interns, alumni, and short-term international assignees <u>are not</u> eligible to participate at this time. Volunteers must be employed with PwC for all 25 - 100 hours of service to be eligible for a grant.

Q: Are non-exempt staff eligible for a Dollars for Doers grant?

A: Non-exempt staff are eligible to receive a Dollars for Doers grant but must first check with their supervisor on the appropriate course for logging volunteering time into Mobile T&E. Please note: for staff who work on an hourly basis, incurring overtime for volunteer work is discouraged but please speak to your supervisor about how best to log time.

Q: In what period are hours eligible for a Dollars for Doers Grant?

A: In the inaugural year, volunteers may use volunteer hours logged between June 1, 2012 and June 30, 2013. *Beginning in FY14, the program will follow the firm's normal fiscal calendar, so hours will be eligible from July 1, 2013 - June 30, 2014. Volunteers have a year from the end of the fiscal where hours have been donated to reach the 25 hours required to submit hours for the grant application. Grants will be paid only in 25-hour increments. Volunteer time prior to June 1, 2012 is not eligible.

Q: How do volunteer hours accumulate?

A: For the inaugural program year, hours accumulate during the period of time starting June 1, 2012 - June 30, 2013 and cannot be carried over from year to year. Volunteers who are newly hired can start accumulating hours right away, but will not be able to include any volunteer time before their start date.

Q: For the launch year beginning June 1, 2012, how will the first five volunteers to reach 25 hours be rewarded?

A: The first five volunteers who reach 25 hours of volunteer service at a single organization and have their <u>application approved by the Foundation</u> will have their per hour match doubled from $10 to $20 per hour (for a total grant of $500). Hours in excess of 25 will not be doubled. **The first five volunteers will also have the opportunity to be featured in PwC News.**

Q: Must all 25 hours be donated at the same organization to receive a grant, or can participants volunteer a total of 25 hours at various organizations and then choose which one to award the grant and/or spread the grant dollars?

A: Participants must volunteer a minimum of 25 hours at <u>one organization</u> in order to receive a grant (all 25 hours must be with the same organization). Should volunteers reach 25 hours at more than one organization, they will be eligible to receive a grant for each of

these organizations assuming all charities are eligible, volunteer service is appropriate and applications are approved. The maximum number of volunteer hours for each volunteer is 100 hours per fiscal year.

Q: Is there a limit to the number of grants I can request?

A: Upon completing 25 hours of volunteer service at one charitable organization, volunteers can apply for up to four grants per year. Grants are paid <u>only</u> in 25-hour blocks. Every grant application assumes 25 hours. It is possible to achieve multiple grants per quarter assuming you volunteer a minimum of 25 hours each at two organizations within one quarter. The maximum grant per year per volunteer is $1,000.

Q: What types of organizations are considered eligible for this program?
A: Grants are restricted to tax-exempt, community-based 501 (c) (3) organizations. Nonprofit organizations (NPOs) that do not have, or are in the process of obtaining their tax-exempt status, are not eligible for this program.

Q: What types of organizations are considered ineligible for this program?
A: Organizations that are not eligible are profit-making organizations, and political, labor and fraternal organizations; and any organization that illegally discriminates, in its constitution or practice against persons or groups. Eligible religious organizations must serve and benefit the community on the whole.

Q: Are there any geographic limitations to the donation? Are international charities eligible?
A: In most cases, nonprofit organizations receiving donations from the PwC Charitable Foundation must be tax-exempt, 501 (c)(3) institutions located and operating in the United States.

Q: What types of volunteer activities are eligible?

A: To be eligible for a PwC Charitable Foundation Dollars for Doers grant, volunteer service activities must include the giving of time (regardless of when) -- hands-on or skills-based -- to a cause without a monetary benefit going to the volunteer. Examples of eligible activities include tutoring, mentoring, providing management consults on strategic planning or financial management, etc. Both skills-based (e.g., applying financial management to help an organization improve an internal operation) and hands-on (e.g., building homes, cleaning a trail) time are eligible.

Q: What types of volunteer activities are NOT eligible?

A: The following activities will <u>not be</u> considered eligible for Dollars for Doers grants:

- Fundraising activities such as garage sales, lemonade stands, cookie sales, one off or single charity events (such as auctions, galas, balls, etc.). <u>Exception: If you are part of a committee that is making plans for fundraising activities, that time is eligible.</u>

- All "athons," such as marathons or walkathons. <u>Exception</u>: If you are a part of the committee that worked directly with the nonprofit in planning the "athon" or similar event, that time is eligible.

- The time spent commuting to a volunteer project. <u>Exception:</u> If commuting is a material component of the service you are providing, e.g., Meals on Wheels, providing transportation to those in need, or driving a group of volunteers to a project, that time is eligible.

- The time spent participating in religious services, such as attending worship services or singing in choirs. <u>Exception:</u> If you spend time volunteering at an event organized by your religious organization that is serving the community at large -- soup kitchens, child-care services for the poor, etc. -- that time is eligible.

Q: Are the hours volunteers spend attending Board meetings eligible?
A: Yes, but only <u>ten hours</u> of attending full board meetings for eligible organizations can be used each fiscal year for a Dollars for Doers grant. However, the time spent working in board sub-committee meetings, using skills to deliver a more tactical project goal <u>are not</u> capped at ten hours and conform to the overall program maximum of 100 hours per year.

Q: Is the time volunteers spend participating religious organization eligible?

A: The time spent participating in religious services, such as attending worship services or singing in

choirs<u>, is not</u> eligible. However, if volunteers spend time volunteering in an event organized by a religious organization that is serving the community at large -- soup kitchens, child-care services for the poor, etc. – that time is eligible.

Q: Will anticipated volunteer time be considered?

A: No. All volunteer time must be completed prior to submitting the application for grant funds.

Q: Where can the Dollars for Doers application be obtained?
A: The application can be accessed on the <u>CR microsite</u> via myKcurve.

Q: How do volunteers apply for a grant?

A: Before volunteers donate their time, they are encouraged to pre-screen their charity in the Dollars for Doers application (Note:

prescreening only confirms that an organization is a verified 501(c)(3), and does not guarantee a grant will be approved). If your organization is in the system's database and you have already volunteered 25 hours, you may apply for a grant right away. If your organization is not in the list, you will be directed to the write in process where Truist will require 10-15 days to complete the verification and you will be alerted via email of the status. All volunteer service hours <u>must also</u> be logged into Mobile T&E. The firm-sponsored time code (80020628001), the personal sponsored time code (80020628002), the skills-based volunteering time code (80020628003) and/or the youth education code (80071199001) can all be used for a Dollars for Doers grant assuming all other program qualifications are met. Grants are paid <u>only</u> in <u>25-hour</u> blocks of time. Hours can be logged and are submitted for approval at anytime, but volunteers are limited to <u>four grants per year.</u> The grant application deadline in any given quarter is two weeks prior to the end of the quarter.

Q: When is the deadline for applications?

A: Applications are accepted at anytime but grants will only be reviewed and processed quarterly in 25-hour blocks. The application deadline for payment in any given quarter is 2 weeks prior to the end of the quarter. See below for a target grant review schedule:

*Note: In year 1 only, the fiscal year for Dollars for Doers is 13 months, June 1, 2012 - June 30, 2013.

Quarter	1	2	3	4
Hours Logged	June – Sept	Oct - Dec	Jan - March	April - June
Application Deadline	9/15/12	12/15/12	3/15/13	7/15/13
Decision Deadline	9/30/12	12/31/12	3/31/13	7/31/13
Grant Paid Deadline	10/31/12	1/31/13	4/30/13	8/31/13

Q: Will grants be awarded for/to an individual?
A: No. Funding must be provided directly to tax-exempt organizations that assist broad-based constituencies, not to individuals. For example, if an application is submitted requesting funding to pay the salary of an individual or for a scholarship for an individual, that application would be declined.

Q: What type of information needs to be supplied regarding my involvement with the organization?
A: Volunteers must provide a contact at the organization where they volunteered who is in the appropriate position to verify their time and service, briefly describe their involvement (volunteer work) with the organization and record hours in the application via Kcurve <u>and also</u> in Mobile T&E to the appropriate charge code/s.

Q: How will the nonprofit organization verify time?
A: The contact designated by the applicant and/or the contact listed on file at the nonprofit organization must verify the hours and the nature of the work volunteered via email. This individual will receive a confirmation email triggered by the application and will have 60 days to verify the time. Once participants have volunteered 25 hours and submit their hours for a grant, a confirmation email will be sent to the NPO contact via email with an aggregate report of the submitted volunteer time. Volunteers will be notified when they log into the system and via email on the status of their application. If the NPO contact does not approve the time within 60 days, an email from volunteersupport@truist.com will be sent to the volunteer on the 61st day alerting them to this. At this time, the volunteer is encouraged to contact the NPO to have them verify the hours.

Q: May volunteers count hours logged during a firm-sponsored event (such as a Summer of Community Service event) or for time booked to the personal-sponsored volunteer time code?

A: Yes. Participants must be sure to charge their time appropriately in Mobile T&E and also in the online application. The different codes[WU2] that can be used for Dollars for Doers are as follows:

- Firm-sponsored volunteering: From Project Make [it] count, to Summer of Community Service, use this code: **80020628001**

- Personal volunteer time: please use this <u>unlimited</u> paid time off to volunteer to causes of personal importance to you: **80020628002**

- Skills-based volunteering: Whether you are helping students and families complete FAFSA forms at a school, or you are helping your favorite charity organize fundraising efforts, use this code: **80020628003**

- Youth education volunteering: **80071199001**
  Use this code for volunteering related to youth education/development, including the teaching of PwC's Financial Literacy Curriculum, Junior Achievement, learning landscape playgrounds, etc.

  *Please note: Project Belize is <u>excluded</u> from the Dollars for Doers program.

Q: What if participants volunteer for more than one nonprofit?

A: Participants will need to complete separate applications for each nonprofit where time is donated. However, each volunteer is limited to 100

hours or $1,000 total in grants each year.

Q: Can I track the status of my grant application in the system?

A: Yes. Below are the various statuses of the grant application process:

• Submitted: Submitted by the volunteer

• Participation Verified: The hours and participation has been verified by the agency or project contact (or site administrator)

• Participation Denied: Denied by the agency or project contact (or site administrator)

• Organization Eligibility Review: The organization is being reviewed to ensure it meets

program guidelines.

• Ineligible Organization: The organization did not meet program guidelines.

• Grant Approved: Grant application has been approved for match, but funds have not yet

been disbursed.

• Disbursed: The grant has been paid by the PwC Charitable Foundation, Inc. to the NPO.

In addition to checking the status of application online, volunteers will also receive email notifications from volunteersupport@truist.com alerting them to the stages above. Final grant approval notification will come from the PwC Charitable Foundation.

Q: How much will the PwC Charitable Foundation donate?
A: When PwC partner or staff volunteers 25 hours of his/her own personal time to a qualifying nonprofit organization, the Foundation will donate $250 to that organization and up to $1,000 (four $25 grants) per year.

Q: What if multiple volunteers submit Dollars for Doers grants for the same organization in a given fiscal year? Is the organization limited to receiving a certain amount of funds in that year?

A: Yes. No more than $250,000 will be awarded to the same nonprofit organization per year under the Dollars for Doers program. However, if your organization has reached this limit, the PwC volunteer/s will still be recognized for their service in a letter for their performance file from Chris Simmons, the President of the Foundation.

Q: How will volunteers be notified if the nonprofit is selected to receive a grant?

A: PwC Volunteers will receive an email from the PwC Charitable Foundation notifying them that their grant application was approved. They will also receive a copy of the grant letter to the charity in an email as well as a signed recognition letter from the President of the Foundation for his/her performance file.

Q: How will the nonprofit be notified if they receive a grant?

A: An email with a soft copy letter attachment and a wire or check will be sent to the nonprofit acknowledging the employee and their volunteer hours (with a copy to the volunteer).

Q: Who has access to my information on this site?

A: We have engaged a third party vendor called Truist to securely process all information and applications and provide us with aggregated reporting data. This aggregated data will only be accessible to a limited group of PwC individuals and will not include details about your personal volunteer service if you wish it to remain private.

Q: How do I get support for anything related to the Dollars for Doers application?

A: For questions related to the website, please send an email to volunteersupport@truist.com, our third party partner.

More questions in regards to policy or eligibility?

Contact Rebecca Caplan, PwC Charitable Foundation Manager, 267-330-1756.

What PwC has been doing and why

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