

THE UPS GIFT MATCHING PROGRAM

Established in 1963, The UPS Foundation's Educational and Cultural Gift Matching Program encourages UPS employees to provide financial support to eligible educational institutions or cultural organizations. Many worthy causes or organizations do not qualify under the guidelines set forth below. They include medical research or health-related organizations, social service/human service organizations, and political organizations which the Foundation supports through other programs.

The UPS Foundation will match - dollar-for-dollar - employee cash contributions (cash, check, credit card, or stock transactions accepted), from \$25 up to \$3,000 per calendar year. All active, full- or part-time U.S.-based employees of UPS or its subsidiaries with 12 months or more of continuous employment can participate in this program.

Eligible Organizations

- **Higher Education Institutions**
 - The General Fund of all accredited nonprofit private and public degree-granting technical schools, four-year and two-year colleges and universities, graduate and professional schools in the United States.
 - A tax-exempt educational fund, such as the United Negro College Fund or Independent College Funds of America, whose sole purpose is raising money for its constituent member colleges that individually are eligible.

- **Kindergarten - 12th Grade Schools**
 - Public schools accredited or recognized by the appropriate governmental educational entity within the state.
 - Private schools accredited or recognized by an appropriate academic accrediting organization.
 - Parent Teacher Associations (PTAs) or Parent Teacher Organizations (PTOs) that are recognized by the Internal Revenue Service as tax exempt under section 501 (c) (3).
 - School district foundations whose sole purpose is raising money for its constituent member schools that are individually eligible.

- **Cultural and Arts Organizations**

Eligible organizations must be open to, and operating for the benefit of the general public and recognized by the Internal Revenue Service as tax exempt under section 501 (c) (3). Organizations eligible for gift matching are limited to the following areas:

- Performing arts companies in dance, drama, opera, and music
- Arts and cultural centers
- Science Centers
- Public Libraries
- Museums
- Botanical gardens
- Zoos
- Environmental or ecological groups whose primary purpose is conservation and education
- Public Broadcasting (television and radio)

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Gifts NOT eligible for Gift Matching

The following gifts will not be matched even though the recipient may be eligible otherwise under the guidelines of the UPS Gift Matching Program. This list is not intended to be exhaustive.

- Tuition payments or payments made in lieu of tuition that are designated by the school as a condition for student enrollment;
- Payments intended to fulfill a person's pledges, tithes, or other church-related financial commitments;
- Payments designated for a specific fund other than the general fund of a college or university (Athletic Fund, Religious, Fraternal or social organizations)
- Gifts that directly benefit the donor, donor's family or anyone designated by the donor, such as memberships, dues, admissions, parking, subscriptions, seating preferences, and other personal privileges.
- Gifts for the private benefit of a specific student or professor, including gifts to provide scholarships or financial aid to individuals designated by the donor;
- Payments for tickets, dinners, lunches, or special events, whether athletic, social or cultural.

PLEASE NOTE: The UPS Foundation will not match any gift that may be applied toward special donor privileges or benefits of more than nominal monetary value. Gifts that result in preferred seating at athletic events or options to purchase such seating, use of athletic facilities, or special parking will not be matched.

How the program works

- Employees complete and sign Section A of the application.
- Employees' manager verifies employment (employee must be active with a minimum of 12 months of service) by completing Section B of the application.
- Employees send the application along with their contribution to the educational or cultural organization.
- The recipient organization completes Section C of the application and attaches all required documentation.
- The recipient organization forwards the application and documentation to The UPS Foundation. Until this happens, The UPS Foundation is not aware of the employee's contribution.
- The UPS Foundation verifies eligibility of the gift and processes the match. Matches are made quarterly and all required information on the application must be complete and necessary documentation attached before a match can be made.

Questions pertaining to the UPS Gift Matching Program or eligibility requirements should be directed to your local Human Resources representative.

The UPS Foundation may revise, suspend, or terminate the Gift Matching Program at any time. It will also rule on any questions regarding the interpretation and administration of the UPS Gift Matching Program, and its decisions will be final.

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The UPS Foundation will match – dollar for dollar – employee cash contributions, from \$25 up to \$3,000 per calendar year. All active, full or part time UPS employees with 12 months or more of continuous employment can take advantage of this benefit.

Eligible educational institutions public or private (must be tax-exempt)

Graduate and professional schools	Universities
Four-year and two-year colleges	Technical institutions
Elementary and secondary schools (tuition costs)	Or extra curricular activities will not be matched

Eligible cultural organizations (must be tax exempt)

Botanical gardens	Community theaters
Environmental or ecological groups	Libraries
Museums	Planetariums
Symphony orchestras	Zoos
Public broadcasting stations (radio & television)	

Ineligible for matching gifts

Churches
Extra-curricular Activities - Sporting events, athletic programs, bands, cheerleading
Medical research or health related organizations
AIDS Foundation, Cancer, Heart, Lung, Leukemia/Lymphoma, Multiple Sclerosis, Easter Seals
Muscular dystrophy, Alzheimer's, Down Syndrome, Autism, Arthritis, Diabetes, March of Dimes
Hospitals, Hospice

Social Service/Human Service Organizations

Adoption agencies	Amnesty International
Agencies administering to the needy (hungry or homeless)	Boy Scouts or Girl Scouts
Community, civic, or fellowship organizations	Family Counseling Agencies
Guide dogs for the blind	Habitat for Humanity
Humane Societies	Red Cross
Rotary or Lions Clubs	Salvation Army
YMCA or YWCA	Special Olympics
Organizations providing humanitarian relief to victims of violence or abuse	

Political Rights or Activist Organizations

Public Interest or Advocacy Groups that deal in Public Policy

Ticket purchases

Memberships

Subscriptions

Pledges

Tuition

Organizations that are not tax-exempt or educational organizations that are not accredited.

The UPS Gift Matching Program Application

Please print except where signature is required. All sections must be completed.

SECTION A: Employee Authorization (To be completed by employee)

Name of Organization Receiving Donation _____

Date of Donation _____

Employee ID # _____

Enclosed is my contribution in the amount of \$ _____.

- Recipient is: an Educational Institution or a Cultural Organization eligible under the UPS Gift Matching Program guidelines.

I certify that neither I, or my family will derive any direct or indirect financial or material benefit from this contribution. I certify that this contribution does not represent payment for tuition or a payment in lieu of tuition, services, or other financial obligations. I have read and understand the guidelines of the UPS Gift Matching Program.

Signature (UPS Employee) _____

Street Address _____

Print Name _____

City, State, ZIP Code _____

E-mail Address _____

SECTION B: Employment Verification (To be completed by employee's manager)

- I have verified that the donor is a regular, full-time or part-time employee of UPS with 12 months or more of continuous employment, or a member of the UPS Board of Directors.

Authorized Signature (Employee's manager) _____

Date _____

Print Name _____

District/Work Location _____

SECTION C: Confirmation (To be completed by recipient)

I hereby certify that:

- The recipient is eligible to receive a matching gift under conditions set by The UPS Foundation and the donor received no goods or services in exchange for this contribution.
- The contribution will not be applied to tuition expenses or payments made in lieu of tuition.
- The recipient has received, and there is currently in force, a ruling from the U.S. Treasury Department stating that contributions to the recipient are deductible by a donor for federal income tax purposes (attach copy of IRS 501 (c)(3) or other tax exempt designation).
- If the organization is a post-secondary educational institution, furnish proof of accreditation by an accrediting agency recognized by the Council on Post-secondary Accreditation (COPA); if recipient is an elementary or secondary school please furnish proof of accreditation by appropriate elementary or secondary school accrediting agency.
- Copy of check or receipt must be attached. If neither is available, please attach a letter on organization's letterhead stating the specific designation of funds, and whether the donor received goods or services. The form cannot be processed without one of the above.

Amount of Gift _____

Tax Deductible Amount of Gift _____

Date Gift Received _____

Name of Organization (Recipient's official name) _____

Signature of Financial Officer _____

Street Address _____

Print Name _____

City, State, ZIP code _____

Title _____

Phone: () _____

Tax ID # _____

Any questions regarding the UPS Gift Matching Program can be answered at 877-914-3046, fax (609) 799-8019, or ups@easymatch.com.

Mail completed form and all required enclosures to: UPS Gift Matching Program
P.O. Box 7109
Princeton, NJ 08543-7109