

Matching Grants Program Policy



1. POLICY

- To a maximum of **[500.00]** per calendar year per employees, XYZ Co. will match employees cash Donations to one or more Eligible Organizations in Canada.
- Neither the employee nor the employee's family members may derive any personal benefit from the Donation made by the employee to the Eligible Organization in order for the employee donation to qualify for matching under this policy.
- Without notice to employees, the **[General Manager]** reserves the right to suspend, change or terminate the program at any time. Only Donations made to Eligible Organizations prior to cancellation or suspension of the program are eligible to be matched.

2. PURPOSE

- To support and encourage charitable and philanthropic is a main belief of XYZ Co. XYZ Co. demonstrates its support of employee's charitable and philanthropic causes by partnering with its employees in Matching Grants programs in matching employee's monetary contributions to Eligible Organizations.

3. SCOPE

- All regular active full-time and part-time employees who have completed at least **[one (1) year]** of continuous service with XYZ Co. qualify for this program.

4. RESPONSIBILITY

- Employees have the responsibility
- to ensure the organization(s) to which they wish to donate is an Eligible Organization to make their contribution. No matching can or will be made to an Ineligible Organization(s). If employees are unsure about Eligible Organization, they may make an inquiry to the **[Human Resources Department]**.
- to complete the employee portion of the Matching Grants Program Application Form (Attachment A) and submit it to the Eligible Organization(s) along with their Donation for completion by the Eligible Organization(s) and for submitting the completed Application Form, together with a receipt for the organization, to the

[Human Resources Department].

- **Human Resources**

The responsibilities of the **[Human Resources Department]** are:

- To answer employee's questions about the program;
- to determine an employee's eligibility to participate in the program; and
- to assess and process employee applications for the Matching Grants.
- The responsibility of the **[General Manager]** is to approve Eligible Organizations for which employee donations will be matched.

5. DEFINITIONS

- **"Donation"** means a cash gift to an Eligible Organization made by an employee. Gifts made by an employee's spouse, child or other family member do not qualify, nor do tuition payments, alumni association dues, subscription fees, ticket purchases, social fundraising events, gifts in-kind, donations to athletic scholarships or estate bequests, even if such payments are made to otherwise Eligible Organizations.
- **"Eligible Organization(s)"** must

(i) be established and operated for charitable purposes in Canada;

- be registered as charities under the Income Tax Act (Canada); and
- be authorized by the Canada Revenue Agency to issue official donation receipts for gifts the organization receives from individuals and corporations.

Some Eligible Organizations are specified in Attachment B to this policy and include organizations in the fields of health, post-secondary education and medical research. If an employee would like to donate to an organization not listed in Attachment B, they must receive confirmation in writing from the **[General Manager]** that the intended recipient qualifies as an Eligible Organization.

6. REFERENCES and RELATED STATEMENTS of POLICY and PROCEDURE

None

7. PROCEDURE

- An employee who wishes to have XYZ Co match an employee donation is required:
- to complete a Matching Grants Application Form;
- submit the Matching Grants Application Form with a copy of the tax receipt for the donation to the **[Human Resources Department]**.
- Within [one (1)] month of the approval of the Matching Grants Application Form, payments will be made directly to the Eligible Organization.
- The eligibility determination of any organization rests solely with the **[General Manager]** whose decision is final. Prior to making a Donation or commitment to a Donation, employees who have questions or concerns regarding the eligibility of a particular organization or project, should seek a determination from the **[Human Resources Department]**.

8. ATTACHMENTS

Attachment A – Matching Grants Application Form

Attachment B – Eligible Organizations for Matching Grant Donations

ATTACHMENT A

MATCHING GRANTS PROGRAM APPLICATION

Employee Information (to be completed by Employee)

Name: _____ Employee No.: _____ Department: _____
Address: _____ Job Title: _____
City: _____
Province: _____ Postal _____ Amount of Donation: \$
code: _____

I, _____ (employee name) certify that the above-noted
Donation was made to the

Eligible Organization listed below on _____ (date). I have
attached a copy of the receipt for that Donation to this
application. I hereby apply to have **[Company]** match this donation to
the Eligible Organization listed below under the **[Company]** Matching
Grants Program.

Employee Signature _____ Date _____

Eligible Organization:

Address: _____
City: _____ Province: _____ Postal Code: _____

This application for a matching grant is: APPROVED NOT
APPROVED

If approved a cheque in the amount of\$ _____ will be issued to the
Eligible Organization.

Signature (Human Resources) _____ Date _____

ATTACHMENT B

SAMPLE ELIGIBLE ORGANIZATIONS FOR MATCHING GRANT DONATIONS

Canadian Universities recognized by the appropriate provincial Ministry of Education
Community Hospitals recognized and licensed by the appropriate provincial Ministry of
Health Canadian Alzheimer Association

Canadian Cancer Association Canadian Diabetes Association Canadian Heart and Stroke
Foundation Canadian Institute for the Blind Canadian Red Cross

Employees should contact the **[Human Resources Department]**

to determine if other organizations may be approved as Eligible Organizations under

the Matching Grants Program