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# Intel Retiree Donation Matching Program Guidelines

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## About the Program:

Intel's Donation Matching Program supports the personal impact of U.S. employee and retiree donations by matching their contributions made to eligible charitable organizations and schools, dollar-for-dollar. Participants are able to generate an Intel Foundation match of up to $5,000 a year for charitable organizations and eligible educational institutions, funding permitting[1].

## How to Donate:

One-time or recurring donations can be made directly to eligible organizations via the Intel Get Matched Portal using credit card or PayPal. These donations will automatically generate an Intel Foundation match. Alternatively, participants can request a match in the same portal** (*U.S. retirees and BOD participants will need to use the external login page*) for a donation they made directly to the eligible organization using cash, check or stock.  A valid receipt*** from the recipient organization is required to submit this request.

Employee and retiree donations and approved match requests are paid out to the recipient organizations on a monthly basis.

## Eligibility:

## Participant Eligibility

Eligible participants are limited to:

- All active U.S. blue badge employees of Intel Corporation *with access to the Intel network*, including employees on sabbatical.
    - o Spouses of employees may make donations directly to charities, but the employee must submit the receipt in the matching portal** and include a note to the admin indicating they are the spouse of the donor.

- U.S. Intel retirees.
- U.S. based Intel Board of Directors.
- **Note:** All match requests on behalf of non-Intel spouses need to be entered into the [matching portal](#)** by the Intel employee, retiree or BOD.  Non-Intel spousal donations are considered part of the participant's annual match limit.

## Organization Eligibility

To be eligible for the Donation Matching program, organizations must meet the criteria outlined below and register in the Benevity Causes Portal.

### A. Eligible Organizations

Eligible organizations must be recognized by the Internal Revenue Service as exempt from federal income tax as an organization described in section 501(c)(3) of the Internal Revenue Code (the "Code"), contributions to which are deductible under section 170 of the Code.

Schools, Colleges and Educational Institutions:

1. Public/government funded schools (K-12 or equivalent) must be fully accredited and offer comprehensive programs; independent or private schools must be fully accredited, offer comprehensive programs and non-profit, i.e., non-profit 501 (c)(3) or its international equivalent. For religious schools see section C, 1.

2. Colleges and Universities must be degree-granting institutions.

3. Nursery, day care or pre-school program may be eligible for a matching grant if it is a 501(c)(3) public charity or its equivalent or is located at a public school and run by a school that is otherwise eligible for the matching grant program.

Non-Profit/Non-Governmental Organizations:

1. Eligible organizations must be recognized by the Internal Revenue Service as exempt from federal income tax as an organization described in section 501(c)(3) of the Internal Revenue Code, contributions to which are deductible under section 170 of the Internal Revenue Code.

2. Organizations must be a tax-exempt 501(c)(3) public charity or its equivalent and must provide required documents, proof of status and self-certification.

### B. Ineligible Organizations

Ineligible organizations include, but are not limited to, the following:

1. Non-functionally integrated Type III supporting organizations described in section 509(a)(3) of the Code.

2. Political organizations [including political parties, partisan organizations, those supporting specific candidates or legislation (proposed or active), organizations that participate in any amount or form of lobbying, or organizations that engage primarily in political advocacy activities].

3. Religious organizations (churches, synagogues, mosques and other houses of worship) (categorized by the IRS is Religion-Related, includes NTEE Classifications X01-X99), or other organizations primarily promoting religious purposes *unless* the donation is specifically designated for a secular community outreach program. Refer to exceptions section for further guidance.

4. Donor advised funds, private foundations or personal trusts.

5. Organizations that do not comply with Intel's non-discrimination policy (i.e., Organizations must verify that, in addition to other program requirements, their programs and services are offered, and their workplace employment policies and practices are conducted, without discrimination on the basis of race, color, religion, religious creed, national origin, ancestry, age, physical or mental disability, medical condition, genetic information, military and veteran status, marital status, pregnancy, gender, gender expression, gender identity, sexual orientation, or any other characteristic protected by federal, state or local law, regulation, or ordinance.) Refer to exceptions section for further guidance.

6. Municipalities or quasi-governmental organizations [e.g. Towns, Townships, Counties, City, State and Federal entities, Public Administration, Public Libraries (Government Run e.g. Municipality, County, State or Federal), Police and Fire Stations, Parks and Recreation departments and citizen advisory panels. This category extends to include sub-entities, departments and affiliated organizations of and any organization with a Government EIN (Employer Identification Number)]. Refer to exceptions section for further guidance.

7. Chambers of Commerce and other trade or business associations.

8. Terrorist organizations as defined under section 501(p) of the Code. Organizations that finance terrorism or provide support to terrorist organizations.

9. Communist controlled organizations.

10. Organizations that have had their 501(c)(3) Internal Revenue Code status revoked.

11. Organizations that have been deemed non-compliant after completing the required self-certification questionnaire which includes practices on anti-discrimination, non-secular use of funds, political affiliation, deployment of funds, as well as licensing and registration regulations.

## C. Exceptions:

1. Secular Religious Project: A program or project *within* a religious organization, only when the donation is *specifically designated for a secular community outreach program* and participation is non-denominational. Program or project also does **not** include *participation in prayer, worship or religious activity or teaching as a condition of receiving service(s) offered.* Project must serve a need within the community and does **not** use *the initial donation or resulting match for religious purposes of any kind.*
   - **Note**: This includes faith-based schools that the IRS has coded as a religious organization and instruction on faith is **not** included in the curriculum and participation in the project/program is non-denominational.
   - **Note**: Secular projects must have a mission statement and a description of its community purpose before it can be approved for inclusion in Intel's program.
   - **Examples**: Soup kitchen, food bank, homeless shelter, supplies for homeless, educational center, disaster relief, domestic violence counseling services, etc.

2. Cultural and Gender-Responsive programs and Diversity programs: Educational institutions or non-profit organizations which offer programs or have services designed to address the needs of under-represented or target populations may not, in and of themselves, be considered discriminatory and will be considered for funding consistent with the Intel Foundation's Non-Discrimination policy (i.e. all female/male schools, STEM programs focused on girls or ethnic groups, programs focused on people with disabilities).

3. Non-governmental Libraries, including 'Friends of' Libraries [NTEE Codes E112 (single organization support) and E122 (multiple organizations support)].

4. Municipal food banks (and other social services) that have a verified 501(c)(3) status and meet all other program rules.

5. All volunteer fire departments, police departments, emergency medical services, search and rescue services, and safety services that have a verified 501(c)(3) status and meet all other program rules.
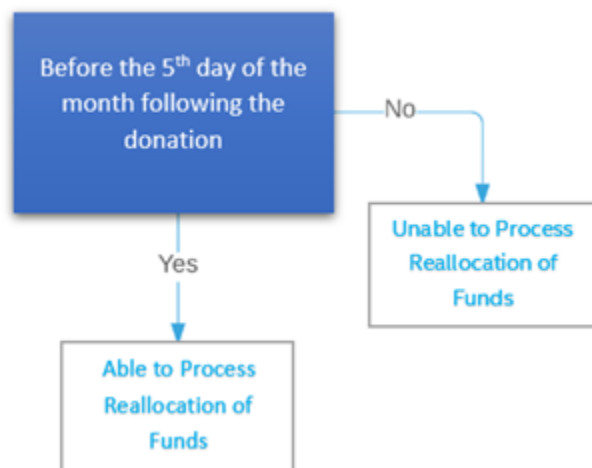
## D. Other Limitations & Restrictions

1. Determination of the eligibility of charitable organizations and education institutions and approval of all match requests is at the sole discretion of Intel Foundation. This program may change, be suspended, or terminated at any time. Approved organizations may lose eligibility for the Donation Matching Program if their tax status is lost or a change in their mission or programs indicate that the organization falls outside these program guidelines. These guidelines may be amended by Intel Foundation from time to time.

2. In accordance with anti-bribery laws and regulations, no grant may be awarded if its purpose is to secure a business advantage for Intel by providing something of value to an officer or employee

of a government (including its departments, agencies, instrumentalities or government-owned or controlled companies), to a candidate for political office, to a political party, or to a public international organization, such as the United Nations or World Bank.

3. Intel Corporation and the Intel Foundation reserve the right to limit the amount of money it will contribute to the Donation Matching Program in any calendar year, to amend or terminate the program at any time, and to make such interpretation in the administration of the program as may be required.

4. Intel Corporation and the Intel Foundation reserve the right to withhold matching funds to schools and organizations on any basis as deemed appropriate.

5. The Intel Employee Code of Conduct applies to the Intel Donation Matching program. There may be significant repercussions for violating program rules.

6. The Intel Foundation reserves the right to withhold matching funds to schools and organizations upon confirmation that there has been misuse of program or falsification of documents.

7. Determination of eligibility of schools and charitable organizations, as well as payment to all schools and organizations is at the sole discretion of the Intel Foundation.

8. Once a donation is committed, it cannot be refunded. However, the amount of your donation can be reallocated to a different charity, up to the 5th day of the month following the donation. After the 5th day, no changes can be made to the donation. For example, if a donation is made between January 1st and January 31st the program manager can approve a reallocation of funds to a different school or charity up until February 5th. After the 5th, no changes can be made.

## Donation Eligibility

### A. Annual Maximum

1. Each eligible Intel participant will be able to generate an Intel Foundation match of up to $5,000 each calendar year for donations to eligible charitable organizations and eligible education institutions.
2. Each eligible Intel participant will be able to participate in special campaigns that have matching outside of their individual match caps when such special campaigns are offered. (ex: disaster relief, humanitarian aid, spotlight organizations)
3. U.S. participants may donate to eligible global causes but only donations to U.S. causes will be matched.

### B. Eligible Donations

1. Donations made after qualifying as an eligible participant (defined above).
2. Donations may be made in the matching portal** by credit card or PayPal.
3. Donations may be made offline directly to the eligible organization using cash, check, credit card, PayPal, or stock. Participants can request a match for donations made directly to the organization. Match requests for donations made outside of the matching portal** must be submitted within 60 days of the donation date or before the annual deadline, whichever comes first. Annual deadlines are posted on the program website.
4. Participants may submit a receipt with multiple donations included on it, so long as the combined receipt is for a single cause, within 60 days, and meets the receipt requirements.
5. Donations must be made directly to an eligible organization. Once made, neither the Intel Foundation match nor the donation can be transferred or re-assigned to a different charitable organization or educational institution.
6. Donations must be at least $1.
7. Donations must be a contribution made directly by the eligible organization from the participant's own assets. Funds collected from others will not be matched.
8. Donations must be made, not merely pledged. A matching donation cannot be used to satisfy a personal pledge or other financial commitment to a charitable organization or education institution (e.g. a pledge of $2,000 cannot be satisfied by $1,000 from the donor and $1,000 from the Intel Foundation match).
9. Donations may be made from a donor advised fund if that entity has been funded solely by the eligible participant and the donation receipt clearly identifies an eligible organization was the recipient. DAF (Donor Advised Fund) receipt or acknowledgement letter must include a

statement that the donation is from the Donor Advised Fund and include the name of the account.

## C. Ineligible Donations

The following are not eligible for matching by the Intel Foundation:

1. Charitable donations for religious purposes or supporting religious activities and programs, (e.g. tithing).
2. Donations supporting political purposes, influencing legislation (lobbying), or electing candidates.
3. Donations, or portions thereof, that are not tax-deductible (e.g. event registration fees, admission fees, auction item value, etc.).
4. **Donations, or non-deductible portions thereof, which directly or indirectly benefit the donor, his/her family, or other person designated by the donor such as:**
   - Donations that are in fact, or are in lieu of, tuition payments or other student expenses (including books, services, fees, etc.);
   - Individual, family or group membership fees/dues, including alumni dues and subscription fees; or
   - Donations to a university/college athletic association that allow the donor to purchase tickets to events.

   If an eligible participant is requesting a match for a payment that is in part a donation and in part a non-deductible benefit back to the eligible participant, the receipt from the eligible organization must clearly specify the tax-deductible portion of such payment in order for the tax-deductible portion to be considered eligible for the match.
6. Donations to a charitable organization or school that allows the donor to select the recipient of a scholarship.
7. Bequests or life income trust arrangements, or donations made to community or charitable remainder trusts or family foundations.
8. Any donation made after the death of an employee or retiree (for example, through a will, trust, estate, etc.)
9. Real estate, in-kind, or non-monetary donations (e.g., services, materials, gift cards, supplies, etc.).
10. Cumulative or aggregated donations from several individuals reported as a single donation (e.g., donations from others cannot be claimed by an eligible participant as his or her own).

Donations cannot be collected from others and donated by an employee or retiree as his/her own donation.

11. Donations that have already been or will be matched through another company's matching program. (Ex: Intel employee's spouse makes a donation, and their company matches; employee or retiree should not submit the same receipt for Intel Foundation matching.)

12. Donations of gift cards are not eligible for matching.

13. Corporate Purchasing Cards (CPC) cannot be used to make donations in Intel's Benevity portal.

[1] This program has an annual, calendar year matching budget cap. If this budget cap is reached on or before the program closes at **3 pm PST on December 15**, all matching as defined within the normal program guidelines will cease until the program reopens the following year on **January 3** of the following year. Donations made after December 15 and before January 3 will not be matched.

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\* Minus any modest administrative fees to process the transaction. See the FAQs for more information.

\*\* U.S. retirees and BOD participants will need to use the [external login page](#).

\*\*\* MATCH REQUEST RECEIPT REQUIREMENTS

A valid receipt must include the following information from the receiving organization. Third party receipts are not eligible. (e.g. A receipt from FaceBook, PayPal or a copy of a check are not valid receipts.) Please verify your cause is active and eligible for matching before making a donation that you intend to make a match request for.

_ALL RECEIPTS MUST BE SUBMITTED WITHIN 60 DAYS OF THE DONATION OR BY DEC 15, WHICHEVER COMES FIRST, AND INCLUDE THE FOLLOWING INFORMATION. NO EXCEPTIONS._

1. A statement that no goods or services were provided in return for the donation, or the Fair Market Value (FMV) of any benefits received and the tax-deductible amount of the donation. Only the tax-deductible amount of the donation is eligible for the match.

   For example: **No goods or services were provided in exchange for this contribution.**

2. Donor first and last name. If the receipt shows only your spouse's name, please indicate the person is your spouse in "Comments to Administrator" when you submit the match request.
3. Receiving organization (501c3 and/or School) name
4. Donation amount (in USD)
5. Date of donation (*must* be submitted within 60 days of the donation and **no later than December 15, 3pm PST**.)
6. Donations made in one year will not be matched in the following year. For example, Donations made in 2023 will not be matched in 2024.

Please note:

- Match request receipts must be in English
- If the donation was made by a personal or family DAF (Donor Advised Fund) or a Trust, receipt or acknowledgement letter must include a statement that the donation is from the Donor Advised Fund or Trust and include the name of the account. DAF and Trust donations do not require a statement of no goods and services.
- Third party DAFs are not eligible.

For Example:

Thank you for making a gift to Meals on Wheels from **(the name of DAF account)** Giving Fund. Your donation of $ **(donation amount)** received **(date of donation)** will provide hot, nutritious meals for seniors.

# Intel U.S. Donation Matching Program FAQs

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## General

1. **What is the Donation Matching Program?**

   The Donation Matching Program enables you to donate to your favorite eligible charitable organizations and schools (a cause) and request a match from Intel Foundation to further your donation's impact. Intel will match eligible donations, up to $5,000 per participant, per year, funding permitting.[1]

2. **How does the Donation Matching Program work?**

   There are two ways to participate in the Donation Matching Program.

   a) Make a credit card or PayPal donation to an eligible cause in the Intel Donation Matching Program [portal.](portal)[3] (*U.S. retirees and Board of Director (BOD) participants will need to use the* [*external login page*](external login page)). Donations submitted in the portal will automatically generate the Intel match at a 1:1 ratio[2], funding permitting.[1] Individual matching limits are $5,000 per year, per participant.

   Example: Participant donates $100 to their eligible organization. Intel Foundation will match it with $100, up to $5,000 [2] per participant.

   b) Make a donation (cash, check, stock, etc.) directly to an eligible cause and **within 60 days of the donation date**,[5] submit a valid receipt[4] in the portal to request a match. It will be reviewed for eligibility and approved, funding permitting.[1]

3. **What are the annual deadlines for the Donation Matching Program?**

   a) **Donating in the Benevity Matching Portal**:  All donations made within the Benevity portal must be completed by **3 pm PST on December 15**. Donations made after December 15 and before January 3 will not be matched. The portal will reopen for 2024 donations on January 3 of the following year.

   b) **Match Request Submissions:**  If the donation was made directly to the charity or school, the **valid** receipt (see guidelines) **must be submitted in the Benevity Matching Portal by 3 pm PST on December 15** to be eligible for matching.  Match requests for donations submitted after December 15 and before January 3 will not be matched. No exceptions will be made.  (i.e., donations must be made, and match requests submitted before 3pm December 15 of any given year. You cannot submit previous year donations for matches once the new year begins.)

## Matching Details

1. **What is the minimum donation amount to qualify for the Intel match?**

   The minimum donation amount to qualify for a match is $1.

2. **What is the match rate?**

   The match rate is 1 to 1.[1]

3. **What is a Cause in the Benevity portal?**

   Cause is the generic name given to any eligible charitable organizations or educational institution.

4. **What is a Cause Project in the Benevity portal?**

   A Cause (charitable organization or school) may create profiles for their different branches in the Benevity portal. For example, a school district may create a project for each school in the district, so donors may select the individual school for their donation. The project is a "child" to the "parent" organization. When donating to a project, the funds go to the parent organization and it is their responsibility to disburse appropriately to the child projects.

5. **What organization receives the Intel Foundation match?**

   The same organization that receives the donation will receive the match.

6. **Can I donate to one organization and have the match go to a different organization?**

   No, there is not an option to donate to one organization and request the match be sent to a different organization.

7. **Can I remain anonymous to the charitable organization or school?**

   Yes. The program will follow all Intel privacy requirements for donor personal information. For all giving through the [matching portal](),[3] the default setting is no personal donor information is shared and participants can remain anonymous. If donors want to share their name with receiving charities, they can update this preference in their profile settings.

8. **I make regular donations to an organization. Can I submit a receipt with multiple donations on it?**

   If all donation dates on the receipt are within the 60-day deadline,[5] yes. However, if you donate monthly, and a match request is submitted after 60 days of the donation date, that donation is no longer eligible for matching and the request will be declined.

9. **I have a recurring donation set up in the matching portal. Are those matched?**

Recurring donations will be matched as long as there are matching funds available.

10. **Can I track my volunteer time or make a donation through the Benevity Mobile App?**

Yes, as long as you have an Intel-enabled device (Intune Company Portal registration required goto/mobilesetup), you can use the Benevity app. To download the app, visit the App Store or Google Play and download the application. Once downloaded, launch it and enter "Intel" as the program domain. Then log in using Single Sign-On (SSO) and begin searching for the causes that matter most, tracking your volunteer time, and making donations.

## International Giving

1. **Can I donate to an international cause and get a match?**

U.S. employees and retirees may donate to any eligible cause in the portal, but only U.S. causes will receive a match.

2. **I'm an international employee. Can I donate?**

Yes, donation matching is global.  Go here to learn about our global program.

3. **I'm an international retiree. Can I donate?**

No. Because retirement criteria differs from country to country, only U.S. retirees are eligible to participate in the donation matching program.


## Eligibility

1. **How do I add my favorite organization--a cause--to the Benevity portal?**
   - You'll need to nominate it for inclusion by clicking Quick Links in the top navigation bar and NOMINATE A CAUSE.
   - Once nominated, you will receive a confirmation and status information along the way.

How can you help? Notify your organization that outreach is coming and ask them to complete the steps asap. Please note volunteers are not allowed to act on behalf of the organization and complete registration. Registration MUST be done by a verified official of the organization.

Questions: Email support@benevity.com. See Organization Eligibility guidelines above.

2. **What is 501(c)(3)?**

To be eligible for the Matching Grant Program, an organization must be recognized by the

U.S. Internal Revenue Service as a tax-exempt public charity under Section 501(c)(3) of the Internal Revenue Code. Organizations described in section 501(c)(3) are commonly referred to as charitable organizations. Since this is a US tax code designation, non-governmental organizations outside of the US would need to provide evidence based on the requirements of their country.

In short summary, this classification refers to the U.S. Code 501(c)(3) which provides for the exemption from tax on corporations, certain trusts, etc. It applies to corporations, funds, or foundations, organized and operated exclusively for religious, charitable, scientific, testing for public safety, literary, educational purposes, fostering national or international amateur sports competition, or for the prevention of cruelty to children or animals. It does not allow for any part of the organization's net earnings to be applied towards activities that benefit private shareholders or individuals, or for the organization to carry on propaganda, attempt to influence legislation, participate in, or intervene in, any political campaign on behalf of (or in opposition to) any candidate for public office.

3. **My non-profit organization is a 501(c)(3) organization but it's still not eligible. Why?**

Non-profit organizations must be 501(c)(3) PUBLIC CHARITIES to be eligible for a matching grant for the Foundation. Many organizations are non-profit, that is, they are generally exempt from paying income tax. Trade associations, chambers of commerce, and fraternal organizations are examples of organizations that are tax-exempt charities. However, donations to these types of organizations are generally not tax deductible to the donor.  Additionally, causes are required to complete onboarding steps before they can become eligible. If the cause has not done that, they would not be eligible in our program.

4. **Where can I go to see if my charitable organization or school (a cause) is eligible?**

All organizations must first register at the Benevity Causes Portal to be evaluated for eligibility. Participants may nominate any cause using the "nominate" button in the matching portal, but they should not act as an agent of the charity or school and complete the registration in the Causes Portal on the organization's behalf.  Participants may encourage a cause to register. To find out if your cause is eligible, head to the matching portal[3] and search for the charitable organization or school by its name or IRS employer identification number (EIN). To be eligible, the organization must:

a)  Have a 501(c)(3) designation from the Internal Revenue Service, and

b)  Comply with Intel Foundation's non-discrimination policy

You can check for 501(c)(3) status on the IRS Website but the process to acknowledge compliance with the non-discrimination policy will occur between the organization and Benevity (portal owner).

5.  **What is an EIN number?**

    An Employer Identification Number is also known as a Federal Tax Identification Number and is used to identify a business entity in the US. The EIN can also be used to track and confirm a non-profit organization's charitable tax status. Public schools and organizations outside of the US do not have an EIN.

6.  **How do I donate to a local organization that doesn't have its own EIN number, but operates under a national or regional affiliation?**

    These types of organizations are called child projects and fall under the umbrella of the parent organization. If the parent organization is approved, it can add the children to its profile in a few quick steps by accessing the [Benevity Causes Portal](#), logging in to its profile, and using the links to add. An example of a parent/child organization would be a unified school district (parent) and all of the schools in the district (projects). The Red Cross has child projects all over the world as well.

    Questions? Email [support@benevity.com](mailto:support@benevity.com).

7.  **What is the required self-certification process that organizations must complete during registration?**

    In order to be eligible for Intel's program, organizations must complete registration steps and the required self-certification questionnaire which includes practices on anti-discrimination, secular use of funds, political affiliation, deployment of funds, as well as licensing and registration regulations.

8.  **What is Intel Foundation's non-discrimination policy?**

    Qualified organizations seeking financial support from the Intel Foundation are required to verify that their program and services are offered without discrimination on the basis of race, color, religion, national origin, ancestry, age, disability, medical condition, genetic information, veteran status, marital status, pregnancy, gender, gender expression, gender identity, sexual orientation, or any other characteristic protected by federal, state or local law, regulation or ordinance.

    Cultural and Gender-Responsive programs and Diversity programs: Educational institutions or non-profit organizations which offer programs or have services designed to address the needs of under-represented or target populations may not, in and of themselves, be considered discriminatory and will be considered for funding consistent with the Intel

Foundation's Non-Discrimination policy (i.e. all female/male schools, STEM programs focused on girls or ethnic groups, programs focused on people with disabilities).

9. **How does Intel's non-discrimination policy apply to faith-based organizations?**

We will continue to follow the existing guidelines for faith-based organization matches. Intel and the Intel Foundation do make grants to the secular projects of religious organizations that support their community outreach activities. They must be secular in nature, open to the entire community and do not involve religious teaching or counseling or other religious requirements in order to participate. Examples of supported programs include food banks, homeless shelters or community suppers. The matching funds must directly support the community outreach programs to which the employee or retiree donated and cannot be used for religious purposes.

10. **How will the eligible organization verify their compliance with the policy?**
The organization will indicate its compliance via the Self-Certification process in the Benevity Causes Portal.

11. **What if my charitable organization or school is unable to comply with the policy?**
They will not receive funding. Alignment with the non-discrimination policy is an eligibility requirement to receive a matching gift.

12. **What happens to my recurring donation if my charitable organization or school becomes ineligible?**
Recurring donations will be cancelled if they are directed to causes that have become ineligible for our matching programs for several months. A cause can become ineligible for many reasons - they could lose their tax status, change their mission / programs, or may not complete (or might fail) the required annual "self-certification" questionnaire. The cause receives several notifications before and after becoming ineligible. Ultimately it is up to the cause to keep or reinstate their eligibility. To renew their eligibility, the cause (not an Intel employee or retiree) should email [causes@benevity.com](mailto:causes@benevity.com).

13. **The guidelines state that schools or non-profit organizations which offer 'gender-based' programs or services may not "in and of themselves, be considered discriminatory." What does that mean?**

Schools and organizations which focus on the development and delivery of programs and services to address unique needs of specific demographics will be considered for funding. For example, health clinics situated to deliver services to Native American populations, single sex schools and colleges, or programs designed to increase the number of girls and underrepresented minorities studying science and math.

14. **If I am on the Board of Directors of a 501(c)(3) or I founded my own non-profit organization and it has been designated as a 501(c)(3), are they still eligible for matching through the Donation Matching Program?**

If the organization is a 501(c)(3) public charity or its equivalent and meets other program guidelines, it is likely it would be eligible to receive a matching gift.  Your personal involvement as a volunteer, BOD or founder would not disqualify the organization from receiving a gift, so long as your donation and the matching funds do not provide direct benefit to you, an immediate family member, or someone with whom you have a close personal relationship and support the community at large.  To avoid the potential appearance of a conflict, you should have another authorized representative of the organization serve as the organization's contact and create the organization's profile in the Benevity Causes Portal. If you have additional questions, you may want to seek counsel from Intel Ethics office or email the Intel Legal point of contact at outsideboardseats@intel.com.

15. **Can the program match funds to help family members of an employee or retiree who passed away? Can we do a fundraiser for the family and have it matched?**

This type of fundraising and donating is not eligible for Intel matches. Donations must be made to an eligible charity or school (a cause) and cannot directly or indirectly benefit the donor, his/her family, or other person designated by the donor. More information about this is available in the program guidelines.

If there is a specific effort to raise funds for in memory of a person, employees can do this on a small scale following Intel's solicitation guidelines around non-work time and non-work areas. Donations must be made by Intel employees in the form of a personal monetary donation (not collected from others) to be considered for a match. Also, donors may identify a specific organization and ask the cause to create a project specifically in memory of this person. Please note the project would have to meet the Intel program eligibility requirements.

16. **Why has the cause I donated to in the past been removed as an eligible cause in the Benevity portal?**

All causes that receive funding from the Intel Foundation undergo routine eligibility screening and are required to comply with Intel Foundation's non-discrimination policy and other required self-certification standards. This cause may not meet one or more of the eligibility conditions and is no longer available for matching funds.

17. **Intel has matched donations to this cause for years, and it was removed. What has changed recently?**

As the matching programs have expanded toa global audience, the due diligence must also be expanded to protect the reputation of and alleviate risks to Intel and the Intel Foundation. The

decision to move to Benevity as the provider enabled Intel to have a more proactive and efficient process in cause validation.

18. **What is the process to determine if a cause should be removed from Intel's Benevity portal?**

All causes that are active in Intel's Benevity portal undergo routine screening to ensure there is no adverse impact to Intel or the Intel Foundation. Causes are subject to eligibility reviews on a regular basis.

1. The Intel Foundation team reviews identified compliance concerns provided by numerous sources, including but not limited to sanctions, legal, regulatory and law enforcement lists, which initiate further research on a cause.
2. Ethics and Legal Compliance (ELC) runs an in-depth review of the allegations from various sources and determines the validity of the reported allegation(s).
3. ELC completes due diligence including additional screening, and takes into consideration the reliability of the sources, and the history and structure of the cause, etc. to determine if there are compliance issues or concerns that would make funding the cause a potential risk to Intel and/or the Intel Foundation.
4. A determination is made on the eligibility of the cause for Intel's Matching Programs.

19. **Why can't employees or retirees know the identified compliance concerns?**

To protect Intel and the Intel Foundation, as well as for legal and privacy reasons, the specifics of the compliance concerns related to any cause are not shared. Per Intel's Code of Conduct, Intel employees should not be arbiters between Intel and the cause to address any compliance screening. The same applies to retirees.

20. **Can I help the cause become compliant in Intel's Benevity Portal?**

No. Assisting or coaching a cause on how to respond on the self-certification questionnaire does not align with Intel's Code of Conduct policy. If a cause believes their determination of eligibility has been made in error, they should reach out to causes@benevity.com.

21. **Can I have my donation retroactively matched for a cause that became ineligible?**

No. All donations made to causes must be made while the cause is eligible for matching within Intel's Benevity portal. Any donations made after a cause becomes ineligible will not be matched. *For example*, if a cause becomes ineligible on April 20, a donation made externally on April 21 would not be eligible for matching. Please verify your cause is active and eligible for matching before making a donation that you intend to submit a match request for.

22. **Can a Intel employee or retiree, who is also a non-profit board member, use the Intel Foundation match for their donation as part of their fundraising goal/commitment to the cause (organization)?**

Yes, as long as the donation/match doesn't benefit that board member directly. It is the employee's or retiree's responsibility to confirm with the organization whether the organization's policy would allow Intel Foundation matching funds to be used to meet their fundraising goal/commitment.

## Match Requests

1. **What is a match request?**

A match request is a form you submit with a valid receipt,[4] asking for a match for a donation made directly to a cause (not in the matching portal) by giving cash, check, stock, etc. A receipt generated by the cause is required to submit a match request and to be considered for an Intel match.

2. **What information must be included on my receipt to request a match in the** [matching portal](#)[3]**?**

[4] A valid receipt must include the following information from the receiving organization. No third party receipts are allowed (e.g. a receipt from FaceBook, PayPal or a copy of a check are not valid receipts.) Please verify your cause is active and eligible for matching before making a donation that you intend to make a match request for.

*ALL RECEIPTS MUST BE SUBMITTED WITHIN 60 DAYS OF THE DONATION OR BY DEC 15, WHICHEVER COMES FIRST, AND INCLUDE THE FOLLOWING INFORMATION. NO EXCEPTIONS.*

1. A statement that no goods or services were provided in return for the donation, or the Fair Market Value (FMV) of any benefits received and the tax-deductible amount of the donation. Only the tax-deductible amount of the donation is eligible for the match.

   For example: **No goods or services were provided in exchange for this contribution.**

2. Donor first and last name. If the receipt shows only your spouse's name, please indicate the person is your spouse in "Comments to Administrator" when you submit the match request.
3. Receiving organization (501c3 and/or School) name
4. Donation amount (in USD)
5. Date of donation (*must* be submitted within 60 days of the donation and **no later than December 15, 3pm PST**.)

6. Donations made in one year will not be matched in the following year. For example, Donations made in 2023 will not be matched in 2024.

Please note:

- Match request receipts must be in English
- If the donation was made by a personal or family DAF (Donor Advised Fund) or a Trust, receipt or acknowledgement letter must include a statement that the donation is from the Donor Advised Fund or Trust and include the name of the account. DAF and Trust donations do not require a statement of no goods and services.
- Third party DAFs are not eligible.

For Example:

Thank you for making a gift to Meals on Wheels from **(the name of DAF account)** Giving Fund. Your donation of $ **(donation amount)** received **(date of donation)** will provide hot, nutritious meals for seniors.

### 3. What if my match request receipt has only my spouse's name?

When participants submit a receipt that has only their spouse's name on it, the participant should indicate in the "Comments to the administrator" that the name listed on the receipt is their spouse. Your match request will be declined if you do not include this information.

## Donation and Match Payouts

### 1. When will the organization receive my donation and the Intel Foundation match?
Our supplier makes monthly disbursements to the organizations. The disbursements include both the participant's donation and the Intel match. Assuming the organization is in good standing and funds accumulated meet the donation minimum threshold amount of $100, funds are disbursed in one payment around the last week of the following month (Ex: donations made in May will be disbursed the last week of June.).

The donation threshold is designed to increase the administrative efficiency for the supplier, the Intel Foundation, and the receiving charitable organization and/or school.

### 2. How do I see the status of donations or match requests I have made?

In the [matching portal,](#)[3] go to "My Dashboard" and click "My Profile." From there you can see the status, as well as upcoming donations, donation history, and donation receipts.

3. **How will I know if my cause will receive matching funds or if matching funds are still available?**

When submitting the donation, match amounts will display in the form. If funding for the program has been depleted, the cause is not eligible for matching, or the employee or retiree has reached their $5,000 cap, the match amount will display as $0.

4. **I made a donation to my favorite charity but the electronic receipt I received was issued by the American Online Giving Foundation. Why?**

A receipt or acknowledgement is issued by American Online Giving Foundation, which acts as a donor advised fund in facilitating distributions to other registered charities, including the specific charity chosen by you. Your chosen charity does not have to issue a receipt or acknowledgement nor do any other processing of the transaction. Page two of the receipt will show the receiving cause and amounts.

5. **How long do I have to request a match if I've made a donation outside of the matching portal by cash, check, credit card, stock, etc.?**

Match requests for donations made directly to a cause must meet *all the following criteria*:

a) Submitted within 60 days of the date of the donation or before the annual deadline, whichever comes first.[5]

b) Meet all program guidelines.

c) Matching funds are available the date of the match request <u>submission</u> (not the date of the donation).

6. **Are there any fees applied when I make a donation?**

A 2.9% fee is deducted from the donation and the match (Ex: $100 donation, matched by $100 from the Intel Foundation will have $2.90 deducted from the donation and $2.90 deducted from the match). This administrative fee covers vetting and onboarding of causes as well as support for cause questions and issues. Regardless of the fees, employees or retirees will receive a donation tax receipt or acknowledgement for 100% of their donation to the eligible charitable organization or school.

Additionally, PayPal and credit cards charge transaction merchant fees, according to their policies. Merchant fees are charged only for the donation and are usually around 2.5% plus a per-transaction flat fee. Making the donation directly to the charity also incurs merchant fees as well as banking transaction fees, usually in excess of the 2.9% debited through the Benevity portal. Please see [True Cost of Charitable Giving] for more information about fees.

7.  **If I make my donation directly to the charity and submit a match request, are there still fees?**

    Yes. Donating directly to the cause does not eliminate the processing fees, such as merchant fees (charged by PayPal and credit cards) and banking transaction fees. Causes still pay these fees independently to their banking and credit card vendors, usually in excess of the 2.9% debited through the Benevity portal. Please see [True Cost of Charitable Giving](#) for more information about fees. With match requests, the Benevity fees are only deducted from the match amount. This administration fee covers vetting and onboarding of causes as well as support for cause questions and issues

## Other

1.  **Are there other ways that I can support non-profit/education organizations I care about with Intel matching?**

    Yes! You can donate at any time to your preferred cause either directly, or in the matching portal if they are eligible for the Intel program, whether or not matching funds are available. You can also volunteer and, if they are eligible, report your volunteer hours for the Intel Involved Volunteer Matching Program. More information about the volunteer program is available [here](#).

2.  **I'm an international employee. Can I donate?**
    Yes, donation matching is global. Go [here](#) to learn about our global program.

3.  **If I leave Intel but I am not an official retiree, can I still have my donation matched?**

    The donation will be matched as long as the date of donation in the [matching portal](#)[3] or your match request was submitted prior to the last date of employment at Intel and the organization is still eligible to receive the match at the time of disbursement.

    **Intel Foundation Donation Matching:**

    *   The Intel Foundation supports charitable giving through the employee Donation Matching program.

        o   Employees and U.S. retirees may make donations to any cause (charitable organization or school) that is eligible in the Benevity portal through regular [Donation Matching program rules](#).

- o Employees and retirees may not crowd-source or solicit donations from other employees for a cause they support.

- o Employees and retirees may not collect funds from others in support of a cause and make a match eligible donation with the aggregated funds.

- o [Goto/getmatched](#) for program rules and requirements.

## Donation Scenarios

1. **My favorite Cause is no longer active.**

    The most likely reason is that the causes self-certification has expired. Ask your cause to visit the [Benevity Causes Portal](#) and check to see if needs to be renewed, or have the cause contact [causes@benevity.com](#) (causes only please) for more information.

2. **I'm having issues accessing Benevity to be able to donate.**

    Please contact Benevity at [support@benevity.com](#). You will need to provide your WWID to receive help.

3. **I made an error when I donated, what should I do?**

    Contact email: [support@benevity.com](#)

4. **I made an error when I donated and want a refund, what should I do?**

    Once a donation is committed, it cannot be refunded. However, the amount of your donation can be reallocated to a different charity, up to the 5th day of the month following the donation. After the 5th day, no changes can be made to the donation. For example, if a donation is made between January 1st and January 31st the program manager can approve a reallocation of funds to a different school or charity up until February 5th. After the 5th, no changes can be made. Contact email: [support@benevity.com](#)

5. **I changed my mind about a recurring donation.**

    You can stop or change any donation that has not yet been processed for the upcoming period while they are still listed on the 'Upcoming Donations' page. From the 'My Dashboard' in the Benevity Portal, click 'My Profile' on the right side of the screen. Click on 'Giving' to see 'Upcoming Donations', 'History' and 'Access Receipts.' In the 'Upcoming Donations' section, find the donation you would like to change and click 'Cancel Donation.' Contact email: [support@benevity.com](#)

## Support

1. **If I have a question about my donation or the Benevity System, whom should I contact?**
   You can contact support@benevity.com or "submit a request" through the Benevity portal. If an organization has a question about registering in the Benevity Causes Portal they can contact causes@benevity.com (causes only please).

2. **If I have a question about the Donation Program, whom should I contact?**
   You can contact communitygiving@intel.com.

## Endnotes

[1] This program has an annual, calendar year matching budget. If the budget has been depleted, all matching as defined within the normal program guidelines will cease until budget is available.

[2] Minus any modest administrative fees to process the transaction. See the FAQs for more information on administrative fees. For more information on the annual match cap, go to Annual Maximum section.

[3] U.S. retirees and Board of Director (BOD) participants will need to use the external login page.

[4] A valid receipt must include the following information from the receiving organization. A receipt from FaceBook, PayPal or a copy of a check are not valid receipts. Please verify your cause is active and eligible for matching before making a donation that you intend to make a match request for.

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1. A statement that no goods or services were provided in return for the donation, or the Fair Market Value (FMV) of any benefits received and the tax-deductible amount of the donation. Only the tax-deductible amount of the donation is eligible for the match.

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For Example:

Thank you for making a gift to Meals on Wheels from **(the name of DAF account)** Giving Fund. Your donation of $ **(donation amount)** received **(date of donation)** will provide hot, nutritious meals for seniors.

[5] Note the Donation Program will close at **3 pm PST on December 15 or** when the matching budget is depleted, whichever occurs first. The portal will reopen for donations on January 3 of the following year. Online donations and match requests submitted after the program closes are no longer eligible for matching. This means they will not be matched during the following year.

[6] Through the Benevity matching portal via credit card or PayPal.