

Our charitable mission is to improve the quality of life in the communities where we live and work by supporting organizations that address vital community needs and issues in the areas of human services, animal welfare, and the environment.

## You Can Make a Difference

Our employees make an extraordinary impact by engaging with our communities. This is why the Deacon Charitable Foundation matches your generosity in one of two ways. As of 10/1/16, eligible cash gifts will be matched on a 2:1 basis to qualifying U.S. nonprofit organizations. When you or a family member volunteers for the same type of organizations we will match \$20 for each hour volunteered. In addition, employees who have never before used the Matching Gift & Volunteer Program will receive an additional \$100 bonus to their designated organization for the first submission to this program.

### Eligible Employees

All full-time regular employees of Deacon Corp., who have been employed at least 90 days, and their immediate families (spouses/ domestic partners and dependent children) may participate.

### Eligible Gifts of Time or Money

1. Eligible gifts must be at least \$20, or
2. You or family members must volunteer a minimum of two hours.

The combined total the Foundation will match is a maximum of \$1,000 per employee per calendar year (or \$1,100 including the first-timers' bonus mentioned above.)

Eligible gifts will not be carried over to a future year. For example, if you make a \$600 gift, you may not request that \$100 be applied to the next year's contribution amount. Be aware that if you make a charitable gift near the end of the year, the payment matching process may not be completed until the following calendar year. Matching contributions are made quarterly by the Foundation – typically in March, June, September, and December each year.

A cash gift must be the personal contribution of an eligible employee or family member paid directly to a qualified nonprofit organization, using cash, check, or credit card. Matching gifts cannot help fulfill a pledge.

## How Do I Make a Matching Gift Donation?

(1) Choose an eligible nonprofit 501c3 charity. (If you have any questions, check with Julie Earnest or a local Giving Committee Co-chair in advance.)

(2) Review the guidelines on our Matching Gift Form (this document) from your office, on request from Julie Earnest, from any of your local Giving Committee members, or download from: <http://deacon.com/MatchingForm.pdf>

(3) If you use a **personal check** or would like your **volunteer hours** matched, the Foundation must have the signature of an authorized contact at the nonprofit to certify receipt of your gift. Please complete and submit page 2 of this form to the organization within six months of the gift. The nonprofit charity will complete its part of the application and will send it to the Foundation.

(4) If you make your gift online via **credit card**, just forward your e-receipt to Julie Earnest – don't worry about the form. *Easiest for you, preferred by me!*

(5) The Foundation confirms employee and organization eligibility, and makes a matching donation. You will receive a confirmation letter once the check has been mailed.

## Eligible Organizations & Volunteer Activities

There are certain nonprofit organizations (501c3 public charities) that do wonderful, charitable work – but we have elected not to provide grants or matching gifts to these organizations because they are outside of our charitable mission. Examples:

- colleges/universities
- religious organizations
- arts / culture (unless there is a strong education/service focus)
- individual schools
- scout troops/sports teams
- organizations/projects that are religious or political in nature or promote a hobby
- organizations that discriminate on the basis of age, disability, religion, ethnic origin, gender, or sexual orientation.

In addition, there are worthy organizations to which we cannot make grants, for reasons related to our legal status as a private corporate foundation, including the following:

- organizations whose primary function is lobbying or litigation
- volunteer service for an appointed or elected government board
- organizations that are membership-based (booster clubs, fraternities, sororities)
- United Way and other grant-making organizations that exist to fund other charities.

## Questions?

If you have questions about whether a charity qualifies for a matching gift, please ask your local Giving Committee Chairperson, or Julie Earnest. We want to help you identify eligible organizations at the outset, and avoid the need to turn requests down.

## THANK YOU TO OUR GIVING COMMITTEE CHAIRS !

### SEATTLE

Astra Persue  
Chad Dias

### PORTLAND

Erin Reed  
Theresa Michels

### SACRAMENTO

Kat Johnson  
Erika Crumley

### IRVINE

Veronica Wences  
Marisa Larson

Julie Earnest, PhD

*Executive Director, Deacon Charitable Foundation*

T: 503.297.8791

F: 503.297.8997

C: 503.926.4434

[julie.earnest@deacon.com](mailto:julie.earnest@deacon.com)

[www.deaconcharitablefoundation.org](http://www.deaconcharitablefoundation.org)



# EMPLOYEE MATCHING GIFT & VOLUNTEER PROGRAM APPLICATION

## PART 1: To be completed by EMPLOYEE / DONOR / VOLUNTEER. Please print.

### EMPLOYEE INFORMATION

Employee Name \_\_\_\_\_

Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Telephone \_\_\_\_\_

Email \_\_\_\_\_

Office:  Seattle  Portland  
 Irvine  Sacramento

### EMPLOYEE CERTIFICATION

I certify that the information I have provided is complete and correct, that my gift fully complies with the program provisions, and that this is not an unpaid pledge or payment for services, tuition, dues, tickets, or any other purpose than a contribution. I am not receiving any value in exchange for this gift. In addition, I believe this organization aligns with our corporate charitable mission.

Signature \_\_\_\_\_ Date \_\_\_\_\_

### CHARITABLE ORGANIZATION BRIEF

Recipient Organization Name \_\_\_\_\_

Type:  Animals  Children/Families  
 Education  Domestic Violence  
 Hunger  Housing/Homelessness  
 Medical  Seniors  
 Environment  Veterans  
 Other \_\_\_\_\_

### MATCHING GIFT INFORMATION

Donor/Volunteer Name \_\_\_\_\_

Date of Gift \_\_\_\_\_

Tax-deductible Gift Amount \_\_\_\_\_

### MATCHING TIME INFORMATION

Donor/Volunteer Name \_\_\_\_\_

Hours Volunteered \_\_\_\_\_ Date(s) of Service \_\_\_\_\_

Brief Description of Activities \_\_\_\_\_

## PART 2: To be completed by CHARITABLE ORGANIZATION. Please print.

### ORGANIZATION DETAILS

Federal I.D. No. (EIN) \_\_\_\_\_

Name and Title of Financial Officer \_\_\_\_\_

Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Telephone \_\_\_\_\_ Ext. \_\_\_\_\_

Email \_\_\_\_\_

Website \_\_\_\_\_

Date of Gift \_\_\_\_\_

Gift Amount Received \_\_\_\_\_

Tax Deductible Amount \_\_\_\_\_

### ORGANIZATION CERTIFICATION

I certify receipt of the gift and/or completion of the volunteer hours indicated above. The matching gift will be used to support the primary objectives of the organization, which is classified as a tax-exempt public charity under Section 501c3 of the Internal Revenue Code, and I further certify that 1) this is an eligible organization; 2) funds received from the Matching Gift & Volunteer Program will not be credited toward fulfillment of an unmet pledge; 3) neither the Deacon Charitable Foundation nor the employee received goods, services, or other quid pro quo as defined in the relevant IRS rules and regulations.

Signature of Financial Officer or Delegate \_\_\_\_\_ Date \_\_\_\_\_

Please return this form to:  
Deacon Charitable Foundation,  
attn. Julie Earnest – Executive Director  
901 NE Glisan Street, Suite 100  
Portland, OR 97232-2730  
or email scanned form to [julie.earnest@deacon.com](mailto:julie.earnest@deacon.com)

Questions?  
Contact Julie Earnest at 503.297.8791  
or email [julie.earnest@deacon.com](mailto:julie.earnest@deacon.com)  
Matching gift payments will be made quarterly.