



## FREQUENTLY ASKED QUESTIONS FOR ELIGIBLE EMPLOYEES

Cast members and employees of The Walt Disney Company or of any of its affiliates and subsidiaries participating in this Program will be collectively referred to as “employees.” All capitalized terms not otherwise defined in this FAQ document have the meanings given them in the Terms and Conditions of the Program.

### EMPLOYEE ELIGIBILITY

#### **I am a Disney employee, but I am located outside the U.S. Can I still participate?**

Currently only U.S (i.e., the 50 States and the District of Columbia) based employees who are otherwise Eligible Employees and are on assignment in another country are eligible to participate. The Walt Disney Company Foundation is reviewing ways to expand the Program in the future.

#### **When will Disney Employee Matching Gifts become available internationally?**

The Walt Disney Company Foundation is reviewing ways to expand the program internationally in the future, and will provide more information when it becomes available.

#### **Are retired employees eligible to participate?**

No, only current full-time or part-time Disney employees as defined in the Terms and Conditions of the Program or active members of the Board of Directors of The Walt Disney Company are eligible to participate in the Program.

#### **What happens if the employee whose charitable organization is approved to receive a matching gift under the Program leaves Disney before the matching gift check is sent by the Foundation?**

The matching gift will continue to be processed on behalf of the Eligible Employee who has made the donation and then left Disney after requesting the match.

### DONATION ELIGIBILITY

#### **Can I give to more than one organization?**

Yes, any number of Eligible Organizations can be supported by an Eligible Employee as long as the Eligible Employee’s total donations do not exceed the \$15,000 annual allowance and the Eligible Organizations:

- Are electronically verifiable through the IRS Business Master File *OR*
- Are verifiable in the National Center for Education Statistics database *OR*
- Are organizations already (i) selected by the Foundation to correspond to The Walt Disney Company’s philanthropic focus areas of Conservation, Compassion and Creativity and (ii) verified as Eligible Organizations in the Program’s database *AND*
- Meet all other Program eligibility criteria

**I am fundraising for a school, race, tournament, etc. Can I request a match for the total amount of money I raise?**

No, only the personal donation of the individual Eligible Employee will be considered for a matching gift. Donations made with funds provided in whole or in part to an Eligible Employee for the Program by other individuals (whether or not Eligible Employees themselves), groups or organizations are not permitted and are in violation of the Terms and Conditions of the Program.

**Can several employees pool their donations to create a bigger gift?**

No, only a donation from an individual Eligible Employee will be considered. Donations made with funds provided in whole or in part to an Eligible Employee for the Program by other individuals, groups or organizations are not permitted and are in violation of the Terms and Conditions of the Program.

**Can I request a matching gift for a portion of a payment for a race or golf tournament entry fee, a fundraising dinner ticket or table, etc.?**

Only the tax-deductible portion of the payment (that is, the portion that is not in exchange for services or products) is eligible for a matching gift. All charitable organizations are required to supply a donation acknowledgment (receipt) that details this information. Please contact the charitable organization directly if you are not sure how much of your payment is tax-deductible. Employees are responsible for ensuring accurate information.

*When completing the online request for a matching gift, please enter only the tax-deductible amount in the "Total Personal Donation Amount" field. For instance, if you wrote a \$100 check for a 5K race and the race fee was only \$40, you may request a match for the remaining \$60 tax-deductible donation. In the online application, you would enter \$60 into the first field, "Total Personal Donation Amount."*

**Are donations made to meet specific minimum donation requirements for schools eligible?**

No, the Program considers minimum donations requirements for schools to be akin to additional tuition, and they are in violation of the Terms and Conditions of the Program.

**My organization offers memberships. Is this eligible for matching?**

Memberships that result in free admission to venues that otherwise require a ticket or access to exclusive events are not eligible. For example, museum or zoo memberships, for which you receive free tickets, are ineligible. Any donation that you make in addition to the membership fee is eligible for a matching gift.

Some charitable organizations automatically grant membership with every donation. In order for these donations to be Eligible Donations, the charitable organization must provide public access to its services without charge. For instance, public broadcasting stations often refer to donors as members; however, their core broadcasting services are available to the public at large for free, and therefore a donation to such a station would be eligible for a matching gift.

**I received a complimentary gift for my donation; can I still request a matching gift?**

Yes, complimentary gifts that are of nominal value do not constitute a benefit to the Eligible Employee. For example, donations that result in the unsolicited receipt of items such as tote bags, hats, address labels, CDs, etc. that are of significantly lesser value than the donation and received without request are eligible.

**Can I submit an anonymous gift for a match?**

Donations that are truly anonymous and thus cannot be verified by the Eligible Organization are ineligible. You may request a matching gift for donations that you made to an Eligible Organization with the stipulation that you remain anonymous as long as the organization has a record of your donation and can verify its receipt.

**Can I make a donation of stock to an Eligible Organization? If so, how do I make a donation of stock?**

Yes, a donation of publicly-traded stock is eligible for a matching gift as long as all other Program eligibility criteria for Eligible Organizations are met. Please contact your broker, tax advisor or financial consultant to discuss the options to consider when donating stock and to determine how to value the deduction for tax purposes.

**ELIGIBLE ORGANIZATION QUALIFICATIONS**

**Why is my charitable organization ineligible even though it meets all of the eligibility requirements?**

The Foundation has pre-selected charitable organizations that correspond to The Walt Disney Company's philanthropic focus areas of Conservation, Compassion and Creativity.

**Why are churches/temples/synagogues/mosques/other places of worship considered ineligible organizations?**

Faith-based organizations or religious programs whose principal purpose is promulgating a particular religious faith, creed or doctrine (e.g., ministries, missions, church planting projects, religious orders, etc.) are ineligible. However, if an organization has ongoing non-sectarian social services programs that serve the community at large regardless of a recipient's religion or religious belief (e.g., a soup kitchen, a homeless shelter, a food bank, etc.) may be eligible provided other criteria are met.

**Why is the Boy Scouts of America considered an ineligible organization?**

Organizations that discriminate in the provision of services unlawfully or in a manner inconsistent with Disney's policies on the basis of race, religion, color, sex, national origin, age, marital status, mental or physical ability, or sexual orientation are ineligible under the Program.

**Is there an appeals process if my designated charitable organization is ruled ineligible for participation in the Disney Employee Matching Gifts program?**

Yes, Disney Employee Matching Gifts Program Support will address eligibility requirements and restrictions. The Walt Disney Company Foundation will review and re-evaluate the Program and Eligible Organizations on an annual basis.

**What happens if the charitable organization that I've requested a match for loses its tax exempt status?**

The Eligible Employee will be notified of that organization's ineligibility and, if that organization's tax-exempt status is reinstated during the same calendar year as the original match request was submitted, the match request may be resubmitted and considered, as long as it is resubmitted within the same calendar year as the original match request AND the individual resubmitting the request is still an Eligible Employee at that time.

**ELIGIBLE EDUCATIONAL INSTITUTIONS**

**How do I know if my educational institution has tax exempt/501(c)(3) status?**

Contact the educational institution directly to confirm its tax exempt status. The educational institution can provide its Federal Tax ID number to you so that you may enter it into the Program's home page search engine and search for the educational institution. If you still cannot find the educational institution in the Program's database, the educational institution may not currently be listed in the IRS Business Master File. You may contact the IRS Call Center at (877) 829-5500 for questions pertaining to 501(c)(3) status.

For more information on 501(c)(3) charitable organizations, please visit [www.guidestar.org](http://www.guidestar.org).

### **How do I know if my public school or public school district is eligible?**

The U.S. Department of Education maintains an electronic database of all public schools and public school districts in the United States, the Common Core of Data. The Common Core of Data is updated annually. This searchable database is available on the National Center for Education Statistics (NCES) website, <http://nces.ed.gov/>. If your public school or public school district is new and does not appear in the search results, please contact your public school or public school district directly to obtain its NCES code and confirm its tax-exempt status as provided by Section 501(c)(3) or Section 170(c)(1) of the Internal Revenue Code.

### **When I search for the educational institution to which I want to donate, a link to “Nominate” the organization displays. What is the “nomination” process?**

There are hundreds of registered educational institutions based in the United States that meet the Program eligibility criteria. Educational institutions that previously have been nominated and approved will appear as Eligible Organizations in the search results on the Program website that can then be selected for matching gift requests.

If the educational institution to which you wish to donate is not among the listed Eligible Organizations in the Program’s database, you can nominate that educational institution for consideration as an Eligible Organization for the Program. Please refer to the Program Overview on the HUB (or local intranet) for eligibility requirements. After you nominate the educational institution, you will receive an email informing you that the Foundation has received the nomination and will review it. You will receive another email, with the Foundation’s decision to approve or not approve the nomination, within two to three weeks following the Foundation’s receipt of the nomination. If the educational institution is approved as an Eligible Organization, you can log in and enter your donation through the Program’s website via the HUB (or local intranet). Eligible Organizations must reply to nomination requests within 90 days.

### **Help, I can’t find the educational institution to which I have donated.**

Make sure that you have entered the correct state of incorporation for the nominated educational institution. If your educational institution still does not appear in the search results, click on the “advanced search” link located on the top of the page to search by the educational institution’s Federal Tax ID or city or NCES code. You also can ask the educational institution to give you its Tax ID number or NCES code. If you are still unable to locate your educational institution, please click on the “Need Assistance” link at the bottom of the page to receive help from Program Support.

### **Are organizations outside the United States eligible?**

No, to be an Eligible Organization, an organization must have been formed in the U.S. However, several of the U.S. charitable organizations pre-selected for Disney Employee Matching Gifts in fact support programs in foreign countries and donations to those organizations may be eligible for matching gifts under the Program.

## **ELIGIBLE PRE-SELECTED CHARITABLE ORGANIZATIONS**

### **How did Disney compile the list of pre-selected charitable organizations that appear in the Program’s database?**

The Foundation selected these charitable organizations to correspond to The Walt Disney Company’s philanthropic focus areas of Conservation, Compassion and Creativity.

### **Where do I check to see if my charitable organization is eligible?**

The Walt Disney Company Foundation has pre-selected charitable organizations that correspond to Disney’s philanthropic focus areas Conservation, Compassion and Creativity. These pre-selected charitable organizations can be searched by logging on to Disney Employee Matching Gifts from the HUB (or local

intranet), and selecting the philanthropic focus area that best fits your charitable organization. From there you may peruse the list of Eligible Organizations.

## REGISTERING DONATIONS

### **After I register my gift online, what happens?**

Disney Employee Matching Gifts notifies the Eligible Organization of your request via email notification, followed by three letters over the next 90 days. The Eligible Organization is instructed to log on using the same login information it created during the nomination process and confirm receipt of your donation.

The Eligible Organization MUST confirm receipt of your donation. You will receive an email upon the Eligible Organization's confirmation. If the Eligible Organization does not confirm your donation within 90 days of your match request, your matching gift request will be automatically rejected. You must contact the organization if this occurs.

The Walt Disney Company Foundation processes matching gift payments four times a year. The Program verifies that your matching gift request is consistent with the Program's requirements. If so, your matching gift will be processed in the payment cycle immediately following the Eligible Organization's confirmation of your donation. You will receive another email when a matching gift payment has been made to the Eligible Organization on your behalf.

### **After my donation is confirmed, when can the Eligible Organization expect my matching gift?**

The Walt Disney Company Foundation generates matching gift payments four times a year. Matching gift donations confirmed by organizations through:

- March 31<sup>st</sup> will be included in the June 30<sup>th</sup> payout
- June 30<sup>th</sup> will be included in the September 30<sup>th</sup> payout
- September 30<sup>th</sup> will be included in the December 31<sup>st</sup> payout
- December 31<sup>st</sup> will be included in the March 31<sup>st</sup> payout

Matching gift payments will not be made except in accordance with the above payment schedule.

#### NOTE:

- Donations made in one year and not confirmed by the Eligible Organization by March 31<sup>st</sup> of the following year will not be eligible for a matching gift under the Program.
- Matching gift requests that have not been confirmed by the Eligible Organization by October 31<sup>st</sup> of a calendar year will not be paid out until the following calendar year.
- Match requests for a particular calendar year must be submitted by January 31<sup>st</sup> of the following calendar year.

### **My organization is requesting a matching gift within a specific timeframe. What is the policy regarding the timing of matching gift payouts?**

The Walt Disney Company Foundation generates matching gift payments four times a year, as set forth in the payout cycle above. Both Eligible Organizations and employees certify their respective agreements to comply with the Terms and Conditions of Disney Employee Matching Gifts, including the payout cycle for matching gift grants. Employees cannot make commitments to organizations on behalf of The Walt Disney Company Foundation, whether for a different payout of a matching gift or otherwise. Any such commitments are in violation of the Terms and Conditions of Disney Employee Matching Gifts.

### **How will I know the status of my matching gift request?**

You can monitor the status of your matching gift request from the Program portal on the HUB (or local intranet). In addition, you will receive email notifications when the Eligible Organization confirms your

donation and when The Walt Disney Company Foundation processes payment of your matching gift to the Eligible Organization.

**How will the charitable organization know that my donation has been matched?**

The Eligible Organization will receive a check for the matching gift with the following note:

*This matching gift has been made at the request of the following Disney employee(s). Please note, this gift does not constitute an endorsement of your organization by The Walt Disney Company family of companies or by The Walt Disney Company Foundation.*

## MATCHING GIFTS PROGRAM

**Can I complete a paper form to receive a matching gift?**

No, The Walt Disney Company Foundation no longer uses a paper form for its matching gifts program.

**Does any part of my donation go to pay for the Disney Employee Matching Gifts Program?**

There is no administrative cost for the Eligible Employee making the matching gift request. The Walt Disney Company Foundation pays the administrative costs associated with managing, processing and distributing employee matching gift funds so that 100% of your matching gift is distributed to the Eligible Organization of your choice.

**How do I get a receipt for tax purposes?**

You must contact the charitable organization to obtain the receipt for your own donation; matching gifts made by the Program are not tax deductible to you.

**How does this program affect EARS to You?**

Right now, EARS to You will continue to operate as a separate program. We are working on integrating EARS to You into Disney Employee Matching Gifts in the near future.

**Matching Gift program support**

For Disney Matching Gifts Program Support:

EMAIL – [disney.egsupport@cybergrants.com](mailto:disney.egsupport@cybergrants.com)

CALL – (877) 229-1812