

Matching gift program:

Frequently asked questions

(Effective June 1, 2018)



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Q: What's changing about the matching gifts program?

A: The TI Foundation board is expanding the scope of its matching gifts program to include any charitable organization, as long as the primary purpose of the organization is not partisan politics, religion or misaligned with TI's corporate values. This change opens the program to thousands of charities that previously were not included and gives Tlers broader choice and greater impact. The yearly maximum cap is also being modified from \$10,000 each to education, arts and United Way to a \$30,000 maximum for you to use the way you wish.

Q: When do the changes go into effect?

A: The expanded program is available starting June 1, 2018. If you made a gift earlier this year (January through May), the change is retroactive to January 1, 2018, for any donations made to eligible organizations.

Q: If I requested a matching gift under the previous guidelines, will the amount count toward my \$30,000 annual limit?

A: Yes. These gifts will be included in calculating the maximum annual match of \$30,000 per donor.

Q: What if I submitted a matching gift request before June 1, 2018, that was rejected because it wasn't either an educational institution or an arts/culture group? Can I reapply now that the donation will be matched?

A: Yes. Your gift can be resubmitted under the new guidelines.

Q: How do I submit for a match?

A: Visit getinvolved.ti.com to get started. You will need to log-in, then start the process to request the match. You can also call **1-855-493-9862 toll free** from 8 a.m. to 8 p.m. (Eastern Time) Monday through Friday if you have questions.



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Q: Give me an example. If I donated to the Susan G. Komen in May, will that donation be matched under the new guidelines?

A: Yes, you can request a match for your donation to Susan G. Komen, among many other nonprofits. A few other examples where Tiers often donate or volunteer that are now included in the match are: Girl Scouts, Boys and Girls Clubs, High-Tech High Heels and JDRF.

Q: What if I contributed to the United Way campaign this year, do I need to request the match?

A: No, if you contributed to United Way this year, your donation was automatically matched through the TI Foundation's match of employee pledges. You do not need to request the match.

Q: What are the guidelines for the TI employee/retiree matching programs?

A: **Matching gifts:** The TI Foundation will match TI employee, retiree and board contributions to U.S.-based pre-K-university education institutions (including colleges and universities in U.S. territories) and eligible U.S.-based nonprofit organizations (minimum of \$25/person/year, maximum of \$30,000/person/year).

A: **Volunteer Match:** The TI Foundation will match TI employee, retiree and board volunteer service at eligible, U.S.-based nonprofit organizations. For every 10 hours volunteered, the TI Foundation will make a contribution of \$125 to the eligible nonprofit organization where the volunteer hours were performed. Multiple applications may be submitted per year for a maximum of \$1,000; however, each request must be for a minimum of 10 hours. More details can be seen in the guidelines documents on the information page.



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Q: Is there a minimum gift requirement?

A: For the matching gifts program, the minimum gift is \$25. For volunteer hours matching grants, the minimum hours to register is 10.

Q: How much will be matched per year?

A: The match limit per program is listed below.

- Matching gifts – the limit is \$30,000/year/TI employee, retiree or board member
- Volunteer matching: the limit is \$1,000/year/TI employee, retiree or board member

More details can be seen in the guidelines documents on the information page.

Q: What is the deadline to request a match?

A: For all programs, the gift of hours, money, stocks and securities must have been made within a calendar year. You have until Jan. 31 of the next year to register your gift. (e.g., If you volunteered 20 hours in Dec. 2018, you have until Jan. 31, 2019, to register those 20 hours online). Before payment can be made, your donation or volunteer hours must be confirmed online by the receiving organization. The deadline for confirming gifts is Feb. 28 (or 29) of the next year (e.g. 2018 donations must be registered by Jan. 31, 2019 and confirmed online by Feb. 28, 2019).

Q: How does my organization qualify for a match?

A: They must meet the guidelines for eligible organizations, and they must confirm receipt of your gift online using the instructions in the coupon/receipt you send to them via email, fax or the U.S. Post Office. More details can be seen in the guidelines documents on the information page.



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Q: What is an eligible organization for a match?

A: Eligible organizations are non-profit, charitable organizations and pre-K-12 schools, colleges and universities in the United States.

- Tax-exempt organizations under section 501(c)(3) of the US Internal Revenue Code
- Public, non-profit private and charter schools serving pre-K – 12th grades, which are physically located in the United States, including tax-exempt school district foundations whose sole purpose is raising money for their districts.
- Two-year or four-year, non-profit private or public colleges or universities physically located in the United States or a U.S. territory that grant associate, bachelors, masters or doctoral degrees.

Q: What is an ineligible organization for a match?

A: These include:

- Organizations that discriminate based on race, color, religion, creed, disability, genetic information, national origin, gender, gender identity and expression, age, sexual orientation, marital status or veteran status
- Organizations in other IRS code classifications such as 501(c)(1), (2), (4), etc. These include fraternal, social, political and trade and industry organizations such as chambers of commerce and labor unions, veterans and military associations
- Organizations promoting political organizations or candidates, or organizations whose purpose is to influence legislation
- Organizations propagating a particular religious faith or creed, or programs that are otherwise predominantly religious or restricted to followers of one religious faith or creed
- Private foundation or endowment funds
- Individuals
- Organizations in which fees are reduced in return for volunteer service (co-op schools)
- Organizations whose indirect or direct actions negatively impact Texas Instruments



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Q: What is an ineligible matching gift?

A: Ineligible gifts include:

- Matching gifts not requested before Jan. 31 or confirmed by the recipient organization by Feb. 28 (29) of the year after gift was made will not be matched
 - Gifts to organizations that discriminate based on race, color, religion, creed, disability, genetic information, national origin, gender, gender identity and expression, age, sexual orientation, marital status or veteran status
 - Gifts to organizations in other IRS code classifications such as 501(c)(1), (2), (4), etc. These include fraternal, social, political and trade and industry organizations such as chambers of commerce and labor unions, veterans and military associations
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 - Gifts to private foundation or endowment funds
 - Individuals
 - Gifts to organizations in which fees are reduced in return for volunteer service (co-op schools)
 - Gifts to organizations whose indirect or direct actions negatively impact Texas Instruments
- Contributions for which the donor receives a benefit in return, such as subscriptions, tickets, gifts, tuition, dues, or conference fees. If a portion of that contribution is deemed tax-deductible, then the tax-deductible portion of the contribution may be eligible for a match
 - Bequeaths
 - Contributions reimbursed by or made on behalf of another individual or organization



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- Pledged gifts. Gifts must be made in cash, personal checks, cashier checks, money orders, credit card, or securities
- Gifts-in-kind (e.g. personal or real property) other than securities; or the value of personal services rendered
- Gifts intended to fulfill a person's pledge, tithes, or other church-related financial commitment

Q: Is a gift made from my donor advised fund eligible for a match?

A: Yes. But the receiving organization must be able to confirm the gift coming from you.

Q: When will my match be paid?

A: The match is paid on a monthly schedule; payment is made in the month following confirmation by the non-profit of the donation or hours volunteered.

Payout schedule:

- Confirmation received by Jan. 31 will be paid out by Feb. 28
- Confirmation received by Feb. 28 will be paid out by March 31
- Confirmation received by March 31 will be paid out by April 30
- Confirmation received by April 30 will be paid out by May 31
- Confirmation received by May 31 will be paid out by June 30
- Confirmation received by June 30 will be paid out by July 31
- Confirmation received by July 31 will be paid out by Aug. 31
- Confirmation received by Aug. 31 will be paid out by Sept. 30
- Confirmation received by Sept. 30 will be paid out by Oct. 31
- Confirmation received by Oct. 31 will be paid out by Nov. 30
- Confirmation received by Nov. 30 will be paid out by Dec. 31
- Confirmation received by Dec. 31 will be paid out by Jan. 31



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Volunteer Matching program

Q: Has the volunteer matching program changed?

A: No, only the name has changed to volunteer matching program (formally called Volunteer Incentive Program or VIP).

Q: What is eligible volunteer service?

A: The TI Foundation volunteer matching program operates on a calendar year (January 1 through December 31). Final submission of grant requests must be made by January 31 of the following year. Eligible volunteer service includes volunteer activities that benefit qualified agencies.

Q: What is considered ineligible volunteer service?

A: Ineligible volunteer service includes:

- Volunteer service that directly benefits eligible participants and/or their families is not eligible
- Volunteer service performed by family members of a TI employee/retiree/director is not eligible
- Anticipated volunteer service not yet performed is not eligible
- Political volunteer activities
- Volunteer service performed for religious organizations such as churches and synagogues
- Travel time to and from the volunteer activities is ineligible; Only actual time spent volunteering counts toward a volunteer match grant
- Requests to support travel expenses will not be considered
- Participation in sports tournaments (unless for a charitable cause)