



## FREQUENTLY ASKED QUESTIONS FOR ELIGIBLE EMPLOYEES AND CAST MEMBERS

\* Cast members and employees of The Walt Disney Company or of any of its affiliates and subsidiaries 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 Company is reviewing ways to expand the program internationally in the future.

#### **Are Disney Board Members or 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 are eligible to participate in Disney Employee Matching Gifts.

#### **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 they are:

- Electronically verifiable through the IRS Business Master File *OR*
- The National Center for Education Statistics database *OR*
- An organization as selected by the Foundation to correspond to Disney’s focus areas of Conservation, Compassion, Creativity and already verified as an Eligible Organizations in the Program’s database *AND*
- Meets all other Program eligibility criteria *AND*
- The Eligible Employee’s total donations do not exceed the \$15,000 annual allowance

#### **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, groups or organizations are not permitted and are in violation of the Terms and Conditions of the Program.

**Can several employees pool their contributions 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 match 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 contribution 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 in to 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, memberships to a museum or zoo, 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 memberships to be eligible, 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, therefore a donation to such a station would be eligible for matching.

**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.

**Should I request a match for donations I made for the Japan earthquake/tsunami relief efforts through Disney's disaster relief links to the Red Cross and Save the Children?**

No, donations made through the Disney site for the relief efforts were already matched.

**ELIGIBLE ORGANIZATION QUALIFICATIONS**

**Why are some organizations ineligible?**

In keeping with Disney's and the Foundation's policies, we do not financially support organizations in which benefits inure back to the members such as labor unions, trade associations, fraternal or political organizations.

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

Organizations have been pre-determined according to a rigorous process that evaluated past giving by employees in donations or time, as well as the Company. The Walt Disney Company Foundation will match gifts to organizations, as selected by the Foundation, to correspond to Disney's focus areas of Conservation, Compassion, and Creativity.

**Why are certain organizations not eligible to participate in Disney Employee Matching Gifts?**

There are several reasons an organization is deemed ineligible:

- 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.
- When an organization's public policy is not aligned with Disney's policies of inclusion. Although The Walt Disney Company Foundation and Disney are organized and operated independently, they share the principles set forth in Disney's Ethical Standards in Disney's [Standards of Business Conduct](#) and expect any recipient of their funds to have a similar commitment to these principles.
- Organizations that are actively engaged in highly controversial issues or use controversial tactics to advocate their position are deemed ineligible. A controversial issue is a serious matter that has an impact on society or its institutions where different segments of the community have strong opposing positions. A controversial tactic is an unlawful activity, or an extreme action that intentionally damages or threatens people or property.

**Why are churches/temples/synagogues/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 may be eligible provided other criteria are met (e.g., a soup kitchen, a homeless shelter, a food bank, etc.).

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

Boys Scouts of America (BSA) does not meet The Walt Disney Company's Foundation Giving Guidelines because its membership policies do not align with our company's commitment to diversity and inclusion.

The Boy Scouts of America has faced controversy on two fronts: exclusion of members based on religious beliefs and exclusion of members based on sexual orientation. Disney and the Foundation's policies are guided by the combined intent to support employee's choice and have the greatest impact in the

community. Therefore, we do not financially support organizations where benefits are primarily limited to members or certain groups or to organizations that discriminate who they will serve. The Company and Foundation uphold the following discrimination policy.

*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. Organizations that serve individuals or groups that have been subject to economic, social, political or other forms of discrimination may be eligible.*

Disney is among many organizations that do not provide financial support to the BSA.

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

Yes, Disney Employee Matching Gifts Program Support will address eligibility requirements and restrictions.

## **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 charitable organization. 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.

The Internal Revenue Service maintains an electronic database of registered 501(c)(3) charitable organizations, the Electronic Master Business File. The Program validates charitable organizations' eligibility through the IRS Master Business File every four to six weeks. 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.

### **Where do I check to see if my educational institution is eligible?**

Log on to Disney Employee Matching Gifts from The Hub, and search for your organization. The organization is eligible if a 'Select' link appears next to it. If a 'Nominate' link appears, please follow the directions below to nominate the organization for consideration. You will receive an email in two to three weeks stating whether the organization is eligible to participate in the program.

### **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. Organizations 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 gifts.

If the organization 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 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. 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 organization. If your charitable organization 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 organization’s Federal Tax ID or city or NCES code. The charitable organization can provide its Tax ID number or NCES code. If you are still unable to locate your charitable organization, 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 and be either:

- A K-12 public school or public school district that is verifiable in the National Center for Education Statistics (“NCES”) database, as an instrumentality of the federal, state or local government *OR*
- A private school that have been granted tax-exempt status under Section 501(c)(3) or of the Internal Revenue Code (“Code”) *OR*
- A private or public degree-granting two- or four-year college or university, dental, medical or law school or other graduate school, or vocational or technical school accredited by a nationally recognized regional accrediting association and have been granted tax-exempt status under Section 501(c)(3) of the Code *OR*
- An educational foundation affiliated with a college or public school or school district that have been granted tax-exempt status under Section 501(c)(3) of the Code
- A non-profit organization duly registered in the United States

**ELIGIBLE PRE-DETERMINED CHARITABLE ORGANIZATIONS**

**How did Disney compile the selection of pre-determined charitable organizations that appear in the Marching Gifts database?**

The Foundation used the following selection criteria to validate each charitable organization and moving forward, an internal committee comprised of Corporate Citizenship Community Engagement Representatives will re-evaluate the Program and eligible organizations on an annual basis:

- Organizations must fit into one of the strategic philanthropic giving areas; Conservation , Compassion, or Creativity
- Organizations must meet [Corporate Giving Guidelines](#)
- Organizations that our employees have volunteered with and have been supported by the Company and its Foundation

- Engage local Disney sites to add organizations that are locally relevant
- Respected and credible, serves broader community
- National organizations: Mainstream, credible, non- controversial, broad in scope

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

The Walt Disney Company Foundation will match gifts to organizations that fit into our focus areas Conservation, Creativity, and Compassion. These pre-determined organizations can be searched by logging on to Disney Employee Matching Gifts from The Hub, and selecting the focus area that your charitable organization fits under. 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 log-in 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 payments four times a year. Disney Employee Matching Gifts verifies that your request adheres to the Program’s donation requirements. If your request is approved, 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 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 payments four times a year. Donations confirmed by organizations through:

- March 31<sup>st</sup> are included in the April 30<sup>th</sup> payout.
- June 30<sup>th</sup> are included in the July 31<sup>st</sup> payout.
- September 30<sup>th</sup> are included in the Oct. 31<sup>st</sup> payout.
- December 31<sup>st</sup> are included in the January 31<sup>st</sup> payout.

IMPORTANT: Donations made by an Eligible Employee in one calendar 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.

**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. In addition, you will receive email notifications when the Eligible Organization confirms your donation and when The Walt Disney Company Foundation processes payment for 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 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 2013.

### **Matching Gift program support**

For Disney Matching Gifts Program Support call 1-877-229-1812 or email [disney.egsupport@cybergrants.com](mailto:disney.egsupport@cybergrants.com).