

# GE FOUNDATION MATCHING GIFTS FAQs

## WHAT IS MATCHING GIFTS?

Matching Gifts is a program whereby the GE Foundation provides a 1-to-1 match for personal, charitable donations made by GE employees. For example, if an employee donates \$50 to a charity and it is approved for matching, the GE Foundation will then provide that charity with an additional \$50. The GE Foundation created the concept in 1954, and since then many companies have started similar programs. In 2015 the Program expanded to include approved charitable organizations in ~75 countries, in addition to the U.S. and U.K.

## HOW DOES THE PROGRAM WORK?

### **Step 1. Donation:**

GE Employees should first make their donation directly to the charity. The Matching Gifts website is for matching registration only – it is not where the donation is made.

### **Step 2. Registration:**

Once the donation is made, the GE Employee should log into the Matching Gifts site at [www.gefoundation.com/matchinggifts](http://www.gefoundation.com/matchinggifts) (in the “GE Participants” section, click to log in using your GE SSO ID/password). Once in the website, the charity search will default to the work country that is on record for you in the OracleHR system; however, if you gave to a charity in another country you can search for that as well. Once you find the right charity, select it and enter your donation details for a match (e.g. the date you donated, the amount, etc.). Then review and submit! You may only register donations you made personally using your own funds.

### **Step 3. Confirmation:**

Once a GE Employee registers for a match, the charity must confirm receipt of the Employee’s donation before it will be eligible for matching (charities complete this step within the same [MG website](#)). The GE Foundation will periodically contact charities with gifts to confirm as a courtesy, but employees are also encouraged to let the charity know about this requirement. It is better to over-communicate to ensure the best chance of success! Once charities are set up to log in, they can do so at any time and do not need to wait to hear from the GE Foundation.

### **Step 4. Review and Payment:**

Once confirmed by the charity, the GE Foundation will review the gift and the charity for eligibility. If approved, the match should be included in the subsequent quarterly payment batch (payment dates are available in the MG website for both donors and charities).

## EMPLOYEE GUIDELINES

### WHO IS ELIGIBLE TO PARTICIPATE?

All Employees of the GE Company are eligible. In addition, the following are eligible:

1. Retirees (U.S.) who retired directly from the GE Company as of 12/31/2017. GE Retiree status must be current on the date(s) the gift was made and registered. A valid GE SSO ID is required to register a gift.
  - a. A surviving spouse of an eligible GE retiree may participate if he/she has attained such status as of December 31, 2014. A valid GE SSO ID is required to register a gift.
2. Current Directors of the GE Company and Directors emeriti who retired as of 12/31/2017.

A valid GE SSO ID is required to log in/register for matching.

#### **CAN MY FRIENDS AND FAMILY PARTICIPATE?**

This is a program for GE donors only. You may register donations you made personally using your own funds, but not funds collected from others. You may want to suggest that friends/family check with their own employer(s) to see if there is a similar program available to them. Other GE employees are welcome to register their own donations for matching as well.

#### **I AM A GE EMPLOYEE LOCATED OUTSIDE THE U.S. CAN I STILL PARTICIPATE?**

Yes, all GE Employees can participate regardless of location. A valid GE SSO ID is required to log in/register for matching.

## **DONATION GUIDELINES**

#### **IS THERE A MINIMUM OR MAXIMUM DONATION AMOUNT?**

Yes - a donation must be a minimum of USD\$25 (or equivalent). In addition, each eligible GE participant has an annual matching maximum of USD\$5,000 (or equivalent) in each calendar year.

#### **CAN I COLLECT MONEY FROM OTHERS AND REGISTER IT FOR MATCHING?**

No, you may only register donations you made personally using your own funds. You may not collect money from others and register it as your own. Other GE employees are welcome to register their own donations for matching as well. For example: if you run in a race for a charity and have collected donations, you may only register your own donation for matching... not those collected from others.

#### **IS MY AUCTION PAYMENT/ATTENDANCE FEE/ETC. ELIGIBLE?**

If your donation was required in order to participate/enter then it is not eligible. Also if you made a donation and received something in return, the value of that item is not eligible. You will have the opportunity to declare the value when you register for matching. The charity will have the opportunity to do the same when they confirm receipt of your donation. Here are some examples:

- Auction: If you paid \$500 for an item worth \$300, only the difference (\$200) is considered charitable and eligible for matching.
- College Athletics: If you donated \$1000 to your college/university for athletics and receive benefits (tickets, etc.) you must declare the value of the benefit/item when registering for matching, since that portion is not eligible.

Usually the tax receipt provided by the charitable organization will outline the difference for you. If any questions, please contact the charity or your tax advisor.

#### **ARE ALL CURRENCIES ELIGIBLE FOR MATCHING?**

Donations should be made directly to the charity, so it is up to the charity which currencies they can accept. When registering for a match to a non-US charity in the Matching Gifts website, there will be an opportunity to indicate what currency was used so that the system can convert the amount to U.S. dollars for matching purposes.

## **REGISTRATION GUIDELINES**

#### **HOW DO I REGISTER A DONATION FOR MATCHING?**

After making your donation directly to a charity, log in to the Matching Gifts website ([www.gefoundation.com/matchinggifts](http://www.gefoundation.com/matchinggifts)). In the "GE Participants" section, click to log in using your GE SSO ID/password. Once in the Matching Gifts site, search for your charity and then register the

details. Remember you can only register what you personally gave (you may not include donations from others).

#### **IS THERE A DEADLINE TO REGISTER FOR MATCHING?**

Yes, donations made in a particular calendar year must be registered by April 15 of the following year.

## **CHARITY GUIDELINES AND ELIGIBILITY**

#### **WHICH CHARITABLE ORGANIZATIONS ARE ELIGIBLE TO PARTICIPATE?**

There are many, many choices: health and human service, civic and community, education, etc. You may review the guidelines at [www.gefoundation.com/matchinggifts](http://www.gefoundation.com/matchinggifts). In order to search the Matching Gifts system, you must first log in (click the "GE Participants" button). Once logged in, the search will default to the work country that is on record for you in the OracleHR system; however, if you gave to a charity in another country you can search for that as well.

#### **ARE CHARITABLE ORGANIZATIONS OUTSIDE THE UNITED STATES ELIGIBLE TO PARTICIPATE?**

Yes. You can search for options once you are logged into the Matching Gifts website ([www.gefoundation.com/matchinggifts](http://www.gefoundation.com/matchinggifts)). The search will default to the work country that is on record for you in the OracleHR system; however, if you gave to a charity in another country you can search for that as well.

#### **CAN I DONATE TO MY CHURCH, SCHOOL, ETC.?**

Houses of worship are not eligible, but some schools may be. Please refer to the guidelines for eligibility criteria ([www.gefoundation.com/matchinggifts](http://www.gefoundation.com/matchinggifts)).

#### **HOW DO I KNOW IF MY CHARITY QUALIFIES?**

First search for the charity in the Matching Gifts system; if there is a "select" link next to it, go ahead and register your donation for matching. Charities can be selected as long as they meet some basic tax status criteria. Please note, however, that all organizations and all gifts will be reviewed on an ongoing basis to determine compliance with guidelines and eligibility for matching. In other words, inclusion in the list/system is not necessarily a guarantee of eligibility. All organizations must confirm compliance with program criteria to access the Matching Gifts system and participate in the program.

#### **I HAVE HAD PREVIOUS DONATIONS MATCHED, BUT NOW THE ORGANIZATION ISN'T ELIGIBLE. HOW IS THAT POSSIBLE?**

Occasionally, an organization may lose its tax status eligibility due to a penalty, an oversight or an error on the IRS electronic database (U.S.) or Charity Commission database (U.K.). The nonprofit should contact the appropriate resource to inquire and resolve the situation. Please note that the GE Foundation also reviews each gift and charity prior to making a matching payment, so it's possible the charity is no longer compliant with the Program guidelines.

## **CHARITIES – HOW TO SEARCH FOR A CHARITY IN THE SYSTEM**

#### **U.S. – Charities in the U.S.**

You must enter at least a partial organization name, as well as the state in which it is located (you also have the ability to perform an Advanced Search using Tax ID/EIN, etc.). If you are unable to find it, it is possible that you are entering too much information into the search engine or that the search is too specific (e.g. if using an acronym, try searching on the full name). You are in essence searching the full IRS database, so the most accurate way to search for a particular organization is to enter the

U.S. Tax ID. If you do not know the ID, contact the charity to get it or try searching the IRS website (<http://www.irs.gov/Charities-&-Non-Profits/Exempt-Organizations-Select-Check>). If the organization still does not appear in our system, it may not currently be listed on the IRS electronic database. You may call the IRS Call Center at (877) 829-5500 and request that it be added to and included in the next update of the electronic database.

### **U.K. – Charities in the U.K.**

You must enter at least a partial organization name to perform a search (you also have the ability to perform an Advanced Search if you would like to use the Charity Commission Number). If you are unable to find it, it is possible that you are entering too much information into the search engine or that the search is too specific (e.g. if using an acronym, try searching on the full name). You are in essence searching the full UK Charity Commission database, so the most accurate way to search for a particular organization is to enter the UK Charity Commission ID. If you do not know the ID, contact the charity to get it or try searching the U.K. Charity Commission website (<http://www.charity-commission.gov.uk/>). If the organization still does not appear in our system, it may not currently be listed. You may contact the Charity Commission and request that it be added to and included in the next update of the electronic database.

### **ALL OTHER COUNTRIES – Charities outside the U.S./U.K.**

You must enter at least a partial organization name to perform a search (the search engine defaults to your work country on record in OracleHR, however if you donated to a charity in another country you can easily search for that as well). If the charity is not located in the Matching Gifts System, it may not have been reviewed yet (must first be reviewed by the GE Foundation’s administrative partner, Charities Aid Foundation). If it is not yet listed, you may suggest that the charity contact CAF to start this process (see the following section for details).

## **CHARITIES – ADDING/SUGGESTING A NEW CHARITY**

### **U.S. – Charities in the U.S.**

First search for the charity in the Matching Gifts site – upon logging in you’ll see a search box on your home page (the site defaults to your work country on record, but if you donated to a charity in another country you can easily do that as well). In the search results that get returned, find your charity. If you see a “select” link next to it, click that to begin registering your donation for matching. If you see “nominate” next to it, that means it meets basic IRS tax qualifications but has never participated in our program. Click the “nominate” link to fill out some brief information; once we add it to the Program you will be notified that it’s ready for you to register your donation. This process usually takes just a few days, however we do ask the charity to first acknowledge that they want to participate... until they accept, we cannot move ahead so you may want to let them know to respond quickly to our email.

### **U.K. – Charities in the U.K.**

First search for the charity in the Matching Gifts site – after you’ve logged in you’ll see a search box on your home page (the site defaults to your work country on record, but if you donated to a charity in another country you can easily do that as well). In the search results that get returned, find your charity. If you see “select” next to it, go ahead and register your donation for matching. If the organization does not appear in our system, it may not currently be listed with the Charity Commission (<http://www.charity-commission.gov.uk/>). You may contact them and request that it be added to/included in the next update of the electronic database.

### **ALL OTHER COUNTRIES – Charities outside the U.S./U.K.**

First search for the charity in the Matching Gifts site – after you’ve logged in you’ll see a search box on your home page (the site defaults to your work country on record, but if you donated to a charity in another country you can easily do that as well). Charities outside the U.S. are managed by our

administrative partner, [Charities Aid Foundation](http://www.cafamerica.org/services/foreign-charitable-organizations/) (CAF); if you don't see yours listed, you may suggest that the charity contact CAF directly to be reviewed – simply refer them to the CAF site for details (<http://www.cafamerica.org/services/foreign-charitable-organizations/>). Please note that the charity may need to pay a fee to be reviewed. Once CAF reviews/approves them, they will soon after be available for selection in our Matching Gifts site. In addition, they will be eligible to receive donations from other U.S. donors (individuals or Corporations) who would like to make a tax-deductible donation to that charity through CAF. Please keep in mind that these charities will still need to comply with GE Foundation guidelines, so inclusion in the list is not a guarantee of eligibility for our Program.

## MATCHING PAYMENTS

### WHEN WILL THE CHARITY RECEIVE THE MATCHING PAYMENT?

The charity must first confirm receipt of a donation in the GE Foundation Matching Gifts system before it can be matched. Payments are made quarterly, so once the charity has confirmed the donation, the match should be included in the next quarterly payment batch (please note that all gifts and charities will be reviewed for compliance and eligibility prior to payment). The quarterly schedule is posted within the Matching Gifts website.

### HOW ARE MATCHING PAYMENTS MADE TO CHARITIES OUTSIDE THE U.S.?

The GE Foundation match will be paid directly to the recipient charity through our administrative partner, [Charities Aid Foundation](http://www.cafamerica.org/) (CAF). Payments are made on a quarterly basis (please note: because there is an additional cost to make payments outside the U.S., there is a minimum threshold... payments will be made once a charity has reached a cumulative total of \$250 from all employee activity).

## GE SINGLE SIGN-ON (SSO) QUESTIONS

### WHAT IS SSO?

GE Single Sign-On (SSO) is a companywide security and navigation feature designed to allow users to securely sign on and move between GE websites. Every GE employee is given an SSO ID (this applies to U.S. retirees as well).

Note to U.S. retirees: The easiest way to register for an SSO account is to do so from the GE Benefits website. Once you have established your SSO ID and password, please go to the Matching Gifts page to log in using your newly established GE SSO ID and password.

### I HAVE AN SSO ID. WHY CAN'T I PARTICIPATE?

Not everyone who has an SSO ID is eligible for the program. Please see the participant eligibility criteria for further details. If you are a new employee, it may be that your information has not yet been added to the eligible population (the update from Oracle HR runs at least twice a month).

### I AM HAVING TROUBLE WITH MY SSO ACCOUNT. CAN THE MATCHING GIFTS TEAM HELP ME?

GE SSO accounts are managed by the Company, so unfortunately the answer is no. The GE Foundation Matching Gifts program simply uses SSO credentials for log-in just like any other GE site. For SSO account issues, employees should contact their local help desk or HR Manager; U.S. retirees may contact Pension Services. Once the account issue is resolved, you should have no trouble logging into the MG site.

**CUSTOMER SUPPORT**

For Matching Gifts customer support, e-mail [gesupport@cybergrants.com](mailto:gesupport@cybergrants.com) or call (800) 305-0669.