



BD Matching Gift Program

Eligibility Requirements

If you're applying for a BD Individual Matching Grant, a BD Team Matching Grant, or a BD Volunteer Match Dollars for Doers grant in honor of your volunteer service, what follows are the eligibility requirements. Here, you'll find an overview of the criteria non-profit organizations must meet in order to receive a BD matching gift grant of any kind. You'll also find information regarding organizations that are ineligible for BD matching gift grants.

All regular, full-time, U.S. associates (including expatriates and those based in and Puerto Rico) are eligible to participate. Current members of the BD Board of Directors are eligible only for individual matching gifts.

In order to receive a BD matching gift or grant, an organization must:

- US-based non-profit organizations must be a registered, eligible 501(c)3 organization, recognized and in good standing as a tax-exempt public charity by the Internal Revenue Service
- Not discriminate on the basis of race, color, religion, age, sex, creed, national origin, ancestry, marital status, familial status, affectional or sexual orientation, disability, military eligibility or veteran status
- Use BD's donations in compliance with all applicable laws, rules and regulations, including without limitation laws relating to anti-terrorist financing and sanctions and export control laws.
- Fall within the eligibility guidelines described below.

BD matching gifts and grants may also not be tied directly or indirectly to past, present or future purchases of BD products, services or solutions.

Donations to schools and faith-based organizations

BD associates sometimes inquire regarding whether financial gifts to schools and faith-based organizations are eligible for a BD match. Please note the following gifts **are eligible** for a BD match:

- Donations to ongoing and independently run, non-sectarian and interdenominational programs, open to the general public, that are affiliated with religious or faith-based organizations that provide social services to the community-at-large on a non-discriminatory basis (e.g., a soup kitchen or homeless shelter operated by a church and open to the general public).

- Donations made to faith-based/religious organizations – **if** the donation (1) is given to a specific program that is non-denominational in nature and (2) benefits the community-at-large on a non-discriminatory basis (e.g., a soup kitchen, homeless shelter, etc.). A secular program designation acceptable to BD is required when submitting a matching gift for these types of donations. Otherwise, the donation is ineligible.
- Donations made to non-public primary and secondary schools accredited by one of the six regional accrediting agencies, or by other acknowledged accrediting agencies.
 - Reminder: Contributions made to accredited, non-public primary and secondary schools will be matched up to and including an aggregate limit of \$1,000 and will be included in an individual's limit of \$5,000 per calendar year. K-12 private schools have a \$1,000 maximum amount eligible for a match.
 - Donations made to parent teacher associations or organizations (PTAs or PTOs) or educational foundations that serve public school systems, provided that the organization receiving the donation is a registered 501(c)3 organization.

The following contributions are ineligible for a BD matching gift

Although there are many organizations that contribute to improvements in health, social welfare, education and culture, the following contributions are not eligible for a BD matching gift or Volunteer Match Dollars for Doers grant:

- Private operating and non-operating foundations and 509(a)(3) - Type III not functionally integrated supporting organizations
- Private foundations, professional associations and social groups
- Gifts made or volunteer service performed by BD retirees, BD spouses, surviving spouses or other family members
- Gifts made through third parties, including gifts using family trusts, donor-advised funds and any other contribution that is not the direct gift of an associate's personal funds to the recipient organization
- Gifts distributed from foundations or charitable trusts controlled by associates or directors. Contributions made through donor-advised funds, charitable trusts, private foundations and family trusts.
- In kind donations or property
- Donations entitling the donor to some personal benefit (goods, services, food, entertainment) in return for the donation, including the purchase of raffle tickets, auction items, dinners, sporting events, golf tournament participation)
- Gifts or payments in exchange for or in expectation of monetary or other benefits given to the associate or any person or organization named by the associate.
- Payments made for non-charitable entry fees into nonprofit walks, races, etc.
- The non-tax deductible portion of payment for items purchased at nonprofit fundraisers (such as silent auctions).

- Gifts made to non-scholastic programs, such sports programs or organizations, such as athletic booster clubs, athletic scholarship programs, and Little League or any other baseball or softball related activities, football, cheerleading, soccer, track, swimming, tennis, hockey, basketball, golf, lacrosse or any other sports-related activities/organizations, whether school or private programs.
- Gifts made to public schools (but, as noted above, donations made to parent-teacher associations and organizations (PTAs and PTOs) or educational foundations that serve public school students, *are* eligible, provided that they are registered as 501(c)3 organizations)
- Gifts made to political parties, political advocacy, lobbying or action organizations
- Houses of worship (e.g., churches, synagogues) and religious programs or organizations whose principal purpose is propagating a particular religious faith, creed, or doctrine (e.g., missions, religious orders), unless the funds are used for specific secular programs, open to the general public, as outlined above.
- Fraternities, sororities, and their affiliated foundations and alumni association
- Gifts made in lieu of tuition payment for services, books or other student fees
- Membership fees for which benefits are received
- Subscription fees for publications
- Insurance premiums
- Gifts made by will or life income plans and similar arrangements
- Gifts made through Crowdfunding sites such as CrowdRise and GoFundMe
- Gifts made, in whole or in part, with funds received from people other than BD associates.

The [BD Associate Giving Portal](#) contains hundreds of organizations which have been vetted for eligibility. If the organization you would like to submit a request for is not already available in the Portal, you can “nominate” the nonprofit for consideration through the portal. Once submitted, we will contact your nominated organization and request necessary documentation. Once the information is received from the organization, it will normally take up to two weeks to determine if the organization is eligible. You will be notified of the decision and if eligible, you can enter your request.

Additional notes about the BD Matching Gift Program:

- A fixed yearly budget is in place for the matching gifts programs. Matching gifts will be processed on a first verified basis.
- BD Social Investing establishes the guidelines for all Associate Giving Programs and reserves the right to interpret, apply, amend, modify, or revoke the program at any time or terminate the program without prior notice. The interpretation, application and administration of the program will be determined by BD’s Social Investing Department and decisions shall be final.
- BD will only issue checks that are made payable to entities that have BD eligible non-profit tax identification numbers (TIN) with the Internal Revenue Service or are

an eligible governmental agency. This applies to both BD associate donor funds and matching gifts.

- BD associate donor funds and verified BD Matching Gifts are typically paid within 90 days from the date the organization verifies the associate's request or from the date the associate's donation is taken from the paycheck.
- BD will make every effort to deliver the associates' donation and corresponding matching gift to the designated recipient organization. However, on occasion, funds cannot be delivered to a recipient organization. This can occur for several reasons, including, but not limited to:
 - Checks were sent to the recipient organization, but never cashed.
 - The recipient organization ceased operations or lost its tax-exempt status.
 - The recipient organization indicates that it cannot comply with the BD matching gift program requirements.
- If BD cannot deliver funds to a recipient organization, the following process will be followed: When a BD check remains outstanding for an extended period, BD will attempt to contact the non-profit organization. If the organization does not respond with the necessary information by the check stale date or is no longer eligible for donations under the BD program, the check will be stopped. BD will redirect the funds to the BD Foundation or as otherwise legally required.

If you have any questions or require assistance with regard to a particular match request, please contact the BD's Matching Gift Support help desk at: (877) 248-5452 between 8 a.m. and 8 p.m. ET Monday – Friday or bdsupport@cybergrants.com.