

# Matching Gift Program Guidelines Template

Use this template to establish and print your organization's Matching Gift Program guidelines. Fill in the text fields below with your specific program details before printing or saving.

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## 1. Company & Program Overview

Company Name:

Program Name:

Program Mission Statement:

## 2. Donor Eligibility

Please specify eligibility status (e.g., "Yes", "No", or "After 1 year of service") for the following groups:

- Full-Time Employees:
- Part-Time Employees:
- Retired Employees:
- Board of Directors:
- Spouses/Spouses of Retirees:

## 3. Eligible Recipient Organizations

Specify which non-profit categories are eligible to receive matching funds (e.g., "Eligible", "Ineligible", or "Restrictions Apply"):

- Educational Institutions (K-12, Higher Ed):
- Environmental and Animal Welfare:
- Health and Human Services:
- Arts, Culture, and Humanities:
- Civic and Community Development:
- Religious Houses of Worship/Programs:

## 4. Contribution and Matching Parameters

Matching Ratio:

Minimum Eligible Donation Amount (\$):

Maximum Match Limit Per Employee, Per Calendar Year (\$):

Eligible Gift Types:

Ineligible Gifts:

## 5. How to Apply and Deadlines

Employee Submission Method:

Organization Verification Deadline:

Annual Program Deadline:

## 6. Program Administration and Support

For inquiries, confirmation status, or issues regarding matching gifts, please contact:

Department/Team Name:

Contact Email Address:

Contact Phone Number:

Internal Portal Web Link: