



## **ZOETIS MATCHING GIFTS POLICY**

**EFFECTIVE: MARCH 18, 2021**

**AUDIENCE: U.S. COLLEAGUES**

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## ZOETIS MATCHING GIFTS POLICY

The Zoetis Matching Gifts Program is a Zoetis community engagement initiative of the Zoetis Foundation Inc. (the “Zoetis Foundation”) that provides colleagues opportunities to create positive change where they live and work, and beyond. Through online tools, Zoetis helps colleagues identify, connect with and amplify their impact for the charitable organizations they find most meaningful. The Zoetis Foundation reserves the right to modify, amend, suspend or discontinue this policy at any time without prior notice.

### MATCHING GIFTS PROGRAM

The Zoetis Matching Gifts Program matches eligible colleague donations dollar-for-dollar, up to \$1,000 per year, to eligible 501(c)(3) tax-exempt organizations, effectively doubling colleagues’ contributions. The program is voluntary and incentivizes colleagues to make contributions benefiting eligible organizations that are important to them.

Colleagues can make a donation that results in a matching gift via the [Benevity Zoetis website](#). Benevity is a hub for online workplace giving, matching, volunteering and provides grant management solutions.

### DOLLARS FOR DOERS

As part of the Zoetis Matching Gifts Program, Dollars for Doers allows eligible colleagues who engage in approved volunteer work to have their volunteer time “matched” by the Zoetis Foundation, at a rate of \$10 per volunteer hour, with a contribution to one or more charitable organizations. To participate, colleagues must track their volunteer hours via the [Benevity Zoetis website](#), and upon approval, “Rewards Dollars” will automatically be added to the colleague’s account (“Giving Account”) on the [Benevity Zoetis website](#). The colleague can then direct their matching funds be donated by the Zoetis Foundation to an eligible organization(s) via the [Benevity Zoetis website](#).

The Rewards Dollars added to the colleague’s Giving Account will depend on the number of volunteer hours submitted and approved. Since Dollars for Doers is part of the Zoetis Matching Gifts Program, Rewards Dollars donated as part of the program will count towards each colleague’s match cap of \$1,000 per calendar year. For clarity, the Zoetis Foundation will match up to \$1,000 of eligible colleague donations (1:1 matching) and Rewards Dollars (\$10 per volunteer hour). Volunteer hours approved above \$1,000 in Reward Dollars will not be eligible for matching. For example, a colleague may donate \$500 (with a \$500 match from the Zoetis Foundation) and then volunteer 50 hours (\$500 in matching Rewards Dollars added to their Giving Account) to reach their annual match cap. Colleagues can reach the annual match cap through either making \$1,000 in donations to eligible nonprofits or volunteering 100 hours at eligible nonprofits (\$1,000 Reward Dollars added to the Giving Account), or any combination of the two. Volunteer Rewards Dollars in a colleague’s Giving Account will not be donated automatically. Colleagues must select an eligible organization to receive the funds and the Matching Gifts Policy will apply to the processing of the funds.

## COLLEAGUE ELIGIBILITY

This policy applies to Zoetis U.S. based regular full-time colleagues and U.S. based part-time colleagues scheduled to work at least 40% of the scheduled work week on a regular basis. Eligibility of union colleagues will be determined at the local site level.

## QUALIFIED ORGANIZATIONS

Eligible organizations are those formed in the U.S. or in any U.S. possession, recognized by the Internal Revenue Service (IRS) as tax-exempt and designated a public charity under Section 501(c)(3) of the IRS (the “Code”) or as an instrumentality of a federal, state or local government as provided by Section 170(c)(1) of the Code. Exceptions include religious organizations unless the program is a secular community outreach program benefiting the community at large with no religious teaching or other requirements to receive services (e.g., homeless shelter, food bank). Exceptions also include political organizations and organizations that are not in alignment with the Zoetis Foundation’s purpose and mission.

Eligible organizations include but are not limited to colleges and universities, private and public elementary and secondary schools, civic, arts and culture, health and human service agencies and environmental organizations. Although the charitable organization must be formed in the U.S., the charitable work of the organization can take place in or outside of the U.S.

The [Benevity Zoetis website](#) includes registered 501(c)(3) organizations with the exception of any organizations that are on the [Southern Poverty Law Center](#) Hate List. Zoetis eligible organizations are identified on the [Benevity Zoetis website](#) and can receive a match from the Zoetis Matching Gifts Program.

## MATCHING GIFTS PROGRAM FAQs

### U.S. COLLEAGUES

#### **Q. Who is responsible for the Zoetis Matching Gifts Program?**

**A.** The Zoetis Foundation provides the funding for the Matching Gifts Program. The Matching Gifts Program is part of the Zoetis Matching Gifts and Volunteering Program. Program guidelines are formulated by the Zoetis Sustainability Office and are reviewed and approved by the Zoetis Foundation on an annual basis.

#### **ORGANIZATION ELIGIBILITY**

#### **Q. What is a “cause”?**

**A.** A “cause” refers to charities and non-profit organizations. The [Benevity Zoetis website](#) uses the term “causes” in place of charities and non-profit organizations.

#### **Q. What is a 501(c)(3)?**

**A.** 501(c)(3) is the section of the Internal Revenue Code which establishes the criteria for tax exempt charitable organizations. An organization must have 501(c)(3) status (i.e., must be tax exempt) to receive matching funds. Note that not all 501(c)(3) organizations qualify for the Zoetis Matching Gifts Program; only 501(c)(3) organizations that also are classified as “public charities” are eligible.

#### **Q. What is considered a public charity?**

**A.** As provided by the IRS, generally organizations that are classified as public charities are those that derive their funding or support primarily from the general public, receiving grants from individuals, government and private foundations. Public charities also include hospitals, as well as schools (both secondary and higher education).

#### **Q. Will all types of donations made to all eligible 501(c)(3) organizations be matched by the Zoetis Matching Gifts Program?**

**A.** No. Even if an organization is an eligible 501(c)(3), certain types of donations made to it are not eligible for a matching gift under this program. Types of donations that are not eligible include:

- Gifts made to charitable remainder trusts, donor advised funds, or private or family foundations.
- Gifts to houses of worship (e.g., churches, temples, synagogues, mosques) or organizations whose primary mission is religious in nature.
- Gifts made in lieu of payment for services (e.g., tuition payments) or other fees for service.
- Gifts to organizations that discriminate on the basis of race, color, ethnicity, creed, ancestry, religion, gender, sexual orientation, age, gender identity or gender expression, national origin, marital status, pregnancy, childbirth or related medical condition, genetic information, military service, medical condition (as defined by state or local law), the presence of a mental or physical disability, veteran status or other characteristics protected by applicable laws.
- Membership fees for which benefits are received.
- Dues to alumni(ae) or similar groups.
- Gifts or payments for primarily political or religious purposes.
- Subscription fees for publications.
- Insurance premium payments.

- Bequests or life income trust arrangements.
- Gifts of real or personal property.
- Pooled gifts from several individuals reported as one contribution.
- Gifts made by spouses or surviving spouses.
- Tickets for benefit dinners or events.
- Payments to satisfy legal obligations.
- In-kind services, materials, supplies or pledges.

There are other types of contributions that may not satisfy the Zoetis Matching Gifts Program eligibility requirements. The Zoetis Foundation reserves the right to determine donation eligibility and whether a gift will be made based on an organization's eligibility and its alignment to the Zoetis Foundation's purpose and mission.

#### **Q. What is considered a private foundation?**

**A.** Private foundations generally derive their funds from a single major source (usually gifts from one family or corporation rather than funding from many sources). Most private foundations primarily make grants to other charitable organizations and to individuals, rather than direct the operations of charitable programs.

#### **Q. Are religious organizations eligible for the Zoetis Matching Gifts Program?**

**A.** The Zoetis Matching Gifts Program does not match contributions to religious organizations, meaning houses of worship (e.g., churches, temples, synagogues, mosques). The [Benevity Zoetis website](#) excludes all religious organizations (as classified by the IRS) from the list of Zoetis organizations eligible to receive matching contributions.

However, donations made to programs operated by an independent faith-based social service organization may be eligible for a match provided that the following criteria are met:

- The organization has a 501(c)(3) determination letter from the IRS.
- The gift or volunteer time is designated to a program that is available and open to all individuals in the community.
- The program is for non-religious purposes (such as a food pantry or domestic abuse shelter) and the organization does not use the program to promote any religion.

If colleagues' donations meet these criteria and the organization is not included as an eligible organization on the [Benevity Zoetis website](#), colleagues are encouraged to "Nominate a Cause" in order to determine its eligibility. Please refer to the following FAQ for more information.

#### **Q. Can I request that my preferred organization be registered and added to the list of organizations eligible to receive a matching gift from the Zoetis Matching Gifts Program?**

**A.** Yes, colleagues can complete a form on the [Benevity Zoetis website](#) to request their organization be added for consideration. Go to Quick Links and select "Nominate a Cause." Complete and submit the information requested. Organizations must match the Zoetis Foundation's eligibility criteria (e.g., 501(c)(3) organization, etc.). Requests will be processed by Benevity on an ongoing basis. Getting an organization onboarded may take up to a month. Any organizations that require Zoetis' approval will be reviewed quarterly by the Zoetis Sustainability Office.

**Q. Once an organization has been added to Zoetis eligible organizations, how does an organization update its contact information on the Benevity website?**

**A.** Organizations can update their contact information through the Benevity Cause Portal at [causes.benevity.org](https://causes.benevity.org).

## **DONATION AND MATCHING PROCESS, PAYMENT, AND DEADLINES**

**Q. How do I make a donation and receive a matching gift via the Benevity Zoetis website?**

**A.** To make a donation and receive a match online, go to the [Benevity Zoetis website](#). Click “Make A Donation” on the navigation bar to view Zoetis Giving Opportunities or search for your preferred organization on your dashboard. Follow the prompts to make your donation via credit card, PayPal, or Apple Pay and note the match amount in the “Your Estimated Match” section. This section will reflect your full donation amount and the match will be processed when the donation is submitted. If donating via credit card, your credit card statement will reflect a payment to the American Online Giving Foundation for the donation.

**Q. What is the American Online Giving Foundation?**

**A.** All donations made through the [Benevity Zoetis website](#) are aggregated and disbursed by the American Online Giving Foundation, Inc. (AOGF). AOGF is a donor advised fund in the United States dedicated to improving the connection between donors and charitable organizations through the power of technology. They work on behalf of companies and individual donors to enable as many people as possible to find and donate to the organizations of their choice, in a way that reduces the overall administrative burden for those recipient charities.

**Q. Can I make a donation using mobile devices?**

**A.** Yes, colleagues with work-issued phones that are on VPN can make donations and receive matches via their mobile device by downloading the Benevity App from the [Apple App Store](#) for iOS or from the [Google Play Store](#) for Android devices.

**Q. What payment forms can I use to make donations on the Benevity Zoetis website?**

**A.** Donations can be made via credit card, PayPal, and Apple Pay. Apple Pay is available through mobile giving and when using Apple’s Safari web-browser.

**Q. Can I enable a payroll deduction?**

**A.** Payroll deduction as a form of payment for donations is not available at this time.

**Q. Why is it necessary to provide the exact date of my donation?**

**A.** The Zoetis Foundation requires the exact date of the donation to determine if the donation is eligible for matching. The Zoetis Foundation does not match donations that are made in prior calendar years.

**Q. When will the organization receive the Zoetis Foundation match?**

**A.** The majority of matching gift requests are reviewed monthly and will be processed within 30 - 45 days. Funds (along with donation matches) are disbursed within 60 days to recipient organizations. Some exceptions may apply when an organization is not already registered in the Benevity platform.

**Q. How will recipient organization know who sent them a donation?**

**A.** Recipient organizations can log into the Benevity Cause Portal to view donor details. They can also access their monthly donation reports within the Benevity Causes Portal. Organizations

will be able to see the name of the company where donations come from, and the details that each user has chosen to share based on their sharing/privacy settings within their profile. At a minimum, colleague zip codes will be shared, and colleagues can choose to share more information, such as their name, email, and address.

**Q. What am I responsible for ensuring when participating in the Zoetis Matching Gift Program?**

**A.** Every colleague is responsible for ensuring the following:

- Their donation is from their personal funds, and that the donation is not in whole or in part the gift of another individual, the sum of the gifts of other individuals, or the gift of any group or organization.
- Both their donation and the matching gift they are requesting from the Zoetis Foundation (if approved) are solely for the use of the organization named in the matching fund request and that neither they, nor any member of their family, nor any related third party, will receive any direct or tangible benefit from this gift.
- They have read and complied with the Zoetis Matching Gifts Policy (this document).

The Zoetis Foundation reserves the right to audit external donations for compliance with program guidelines at any time.

**DONATIONS/MATCHING OUTSIDE OF THE BENEVITY ZOETIS WEBSITE**

**Q. Can I receive a match for a donation that I made outside of the Benevity Zoetis website?**

**A.** Yes. Once you have made your donation, go to the [Benevity Zoetis website](#) and click “Make A Donation” on the navigation bar. Then click “Request a Match.” As part of the request process, you must upload a donation receipt or an acknowledgment letter from the recipient organization. Letters must include the colleague’s name, address, donation amount, date of gift, organization name, and contact information for the organization (email or address).

**Q. What happens if I don’t have the receipt of a donation made to an organization?**

**A.** If a colleague does not have a receipt of a donation, the colleague must contact the organization and request an acknowledgement letter.

**Q. Is there a deadline to submit a match request?**

**A.** To avoid a backlog, match requests should be made immediately after a donation has been made. The official deadline for colleagues to submit a match request for the matching donation to be made in the same calendar year and to count towards that year’s match cap is December 29 11:59:59pm EST of the year the donation was made. For example, if a colleague donates in November 2021, the colleague must submit a match request by December 29, 2021 11:59:59pm EST for a matching donation in 2021. Donations made on the [Benevity Zoetis website](#) via credit card, PayPal, and Apple Pay can be matched up until December 31 6:59:59 EST of the year the donation was made.



## **FEES**

### **Q. Are there fees associated with each donation that I make through the Benevity Zoetis website?**

**A.** Yes, there are transaction fees associated with each donation that are assessed by Benevity:

- The first is a Management Fee of 2.9%. Management fees will apply to all colleague donations and matching gifts paid by the Zoetis Foundation. This fee is deducted directly by the American Online Giving Foundation from the donation amount and matching gift amount. For example, in the case of a \$100 matching gift, the organization will receive \$97.10. These fees cover the cost for Benevity to perform the administrative tasks necessary for charities to receive funds. The fees are used to process and track online donations, automate elements of the disbursement, provide tax receipts, and create donor management reports.
- The second fee is a Merchant Fee that is typically 2.4% when making a donation using a credit card or Apple Pay and 1.9% when making a donation using PayPal. Merchant Fees may vary by credit card company. This fee is deducted directly from the donation amount by the credit card company, Apple Pay, or PayPal. This fee does not apply to donation matches. It's important to note that a standard credit card fee would be charged even if you donated to an organization through their website.

## **RECEIPT**

### **Q. Will I receive a receipt for my donation?**

**A.** Yes, colleagues can access and download their tax receipts within the [Benevity Zoetis website](#) for all donations made using the website. Tax receipts are provided from Benevity's partner, the American Online Giving Foundation. An individual tax receipt is issued for each donation.

### **Q. How can I access my tax receipts?**

**A.** Colleagues can access and download their tax receipts within the [Benevity Zoetis website](#). For step by step instructions on how to locate your tax receipts, please refer to [this article](#) posted on the Benevity Help Center. To view the article please make sure you are first logged in to the [Benevity Zoetis website](#) with SSO and in the Benevity Help Center (click "Help" in the upper right corner of the menu bar). There is no option to have tax receipts emailed or mailed to colleagues at this time.

## **DOLLARS FOR DOERS**

### **Q. What do I do after I volunteer to participate in Dollars for Doers?**

**A.** Zoetis colleagues must fill in all required fields on the ["Track External Volunteering" form](#). This includes listing a contact (name, phone number, and email address) from the nonprofit organization to confirm the colleague's volunteer activity. Volunteer submissions will be reviewed on a monthly basis by the Zoetis Sustainability team.

### **Q. Once my volunteer time is approved, how will my Dollars for Doers Rewards Dollars be added to my Benevity Giving Account?**

**A.** Once a colleague's submitted volunteer time is approved, colleagues will receive an automated email notification indicating approval and the corresponding amount of Rewards



Dollars that will be added to their Giving Account. Colleagues can see the amount of Rewards Dollars in their Giving Account on the Benevity Dashboard on the right-hand side within the colleague's profile.

**Q. Are Rewards Dollars automatically applied to the organization I volunteered for?**

**A.** No, colleagues can apply the Rewards Dollars provided by Zoetis Foundation as a matching contribution to any eligible nonprofit via the [Benevity Zoetis website](#) (which may or may not be the organization they volunteered for).

**Q. How are Rewards Dollars in my Giving Account donated?**

**A.** To choose a recipient organization for Reward Dollars, colleagues can visit the [Benevity Zoetis website](#), search for a cause, select donate now and enter the donation amount. When indicating your payment method, select "Giving Account" and confirm donation.

**Q. Are Rewards Dollars match eligible?**

**A.** No, Rewards Dollars in colleagues' Giving Accounts are not match eligible. The Zoetis Matching Gifts Program allows colleagues to donate or volunteer their time (matching at \$10 per hour), up to a maximum of \$1,000 annually. The Rewards Dollars, as part of the Dollars for Doers program, is the match provided by the Zoetis Foundation, which is then donated to an eligible organization of the colleague's choice.

**Q. Will Rewards Dollars in my Giving Account expire?**

**A.** Yes, colleagues have exactly one year from the day their Dollars for Doers Rewards Dollars are approved for those amounts to be donated to an eligible nonprofit. If they are not used, the Rewards Dollars will be removed from the individual's Giving Account.

**Q. Is there a deadline to submit my volunteer hours?**

**A.** To avoid a backlog, volunteer hour submissions should be made immediately after the volunteering has occurred. The official deadline for colleagues to submit volunteer hours for the matching donation to be approved is December 29 11:59:59pm EST of the year the volunteering occurred. For example, if a colleague volunteers in November 2021, the colleague must submit their volunteer hours by December 29, 2021 11:59:59pm EST for their 2021 volunteering to receive a match. Hours volunteered in 2021 will not be eligible for a match in 2022.

**Q. When my submitted volunteer time is approved does that automatically get applied against my \$1,000 match cap?**

**A.** Yes, once a colleague submits volunteer time and it is approved, it will automatically show up in their Giving Account and count towards that colleague's \$1,000 match cap even though the amount has not yet been donated to an eligible nonprofit. If a colleague does not wish to have Rewards Dollars applied to their Giving Account, the colleague can select "No Reward" under "Choose your volunteer rewards: in the "Track External Volunteering" form.

**Q. Who do I contact if I have additional questions?**

**A.** Should you have any additional questions about the [Benevity Zoetis website](#), please contact [support@benevity.com](mailto:support@benevity.com).