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### Chevron Humankind

#### 1. How does Chevron Humankind work?

Chevron Humankind matches financial contributions made by U.S. paid employees and eligible retirees to nonprofits and provides grants for volunteer time. A [central website](#) simplifies making, as well as matching, your financial contributions, tracking volunteer time and signing up to volunteer.

##### Employees:

- Matching funds of up to \$10,000 per employee per year.
- Gifts can be given to nonprofits on the Chevron Humankind site via a payroll deduction or credit card payment, or given directly to the nonprofit offline (e.g. check, cash, stock, etc.).
- For every 20 hours of volunteer time served at a single nonprofit, an employee may apply for a \$500 grant. A volunteer may obtain up to two grants per year for the same nonprofit or two different nonprofits.

\*Note: Volunteer matching grants count toward the \$10,000 annual cap for employees.

##### Retirees:

- Matching funds of up to \$3,000 per retiree per year.
- Gifts can be given to nonprofits on the Chevron Humankind site via a credit card payment, or given directly to the nonprofit offline (e.g. check, cash, stock, etc.). Automatic pension deductions are not available.
- For every 20 hours of volunteer time served at a single nonprofit, a retiree may apply for a \$500 grant. A volunteer may obtain up to two grants per year for the same nonprofit or two different nonprofits.

\*Note: Volunteer matching grants count toward the \$3,000 annual cap for retirees.

#### 2. Who can participate in Chevron Humankind?

- All Chevron U.S.-paid employees and Chevron employees who are based in the United States.

**Inpatriates** who make a contribution in U.S. dollars can request a corporate match for a cash, check, credit card or stock contribution sent directly to a U.S.-based nonprofit (Direct Giving). Inpatriates can request matching grants for U.S.-based nonprofits.

**Expatriates** who are paid in U.S. dollars can request a corporate match for a cash, check, credit card or stock contribution sent directly to a U.S.-based nonprofit (Direct Giving) or for a contribution made to a U.S.-based nonprofit through payroll (Payroll Giving). Expatriates can request matching grants for U.S.-based nonprofits.

- Former employees who retired having met eligibility requirements for retiree medical coverage from Chevron Corporation, a Chevron Corporation acquired company, and/or a Chevron affiliated company.
- Current and retired members of the board of directors of Chevron Corporation.

Spouses and surviving spouses of retirees and retirees of non-wholly owned subsidiaries of Chevron are not eligible to participate.

### 3. What advice can you give me about the tax implications associated with charitable giving?

Chevron does not provide personal tax advice and suggests that you consult a tax professional for information on charitable contributions. We also suggest that you have in your files a copy of your W-2, receipts (from nonprofits) associated with your contributions, and printouts of any related Chevron Humankind match request or pledge confirmation pages.

### 4. What kinds of organizations does Chevron Humankind support?

Chevron Humankind supports:

- Nonprofit organizations recognized by the U.S. Internal Revenue Service both as tax-exempt under Section 501(c)(3) of the Internal Revenue Code (IRC) and as public charities. This includes nonprofits that are:

**Parts of churches and private schools.** Chevron Humankind will provide matching funds and grants to programs operated by faith-based organizations if those programs: (a) are open to all individuals in the community regardless of religious belief; (b) serve a secular purpose, such as a food pantry or a homeless shelter; and (c) do not require participants to join in religious worship as a condition of receiving the services that the nonprofit offers.

**Members of an exempt group.** Many national nonprofits have a tax exemption status that applies to member organizations.

- Civic organizations (such as a volunteer fire department) recognized by the IRS as tax-exempt under Section 501(c)(4) of the IRC.
- Governmental entities such as public libraries, publicly owned and operated museums, municipal zoos, public schools, state colleges and universities, and community colleges.

Among the exceptions are organizations that violate Chevron's nondiscrimination policy or that represent a conflict of interest with Chevron's business interests.

See Chevron Humankind Guidelines for more information.

**Note:** Chevron Corporation does not endorse the nonprofits that are in the Chevron Humankind database. Employees and retirees are encouraged to research the activities, practices and viability of nonprofits before contributing volunteer or financial support.

### 5. How does the Chevron nondiscrimination policy affect contributions?

To receive a match, nonprofits must abide by Chevron Humankind guidelines and are required to acknowledge that they do not discriminate against any person or group on the basis of race, religion, color, national origin, age, sex, gender identity, disability, status as a disabled veteran, political preference, sexual orientation, membership or non-membership in any lawful organization, or other basis prohibited by local laws or regulations.

### 6. What is our policy on matching grants and volunteer grants for organizations that have a conflict with Chevron?

Nonprofits that might represent a conflict of interest with Chevron's business interests will be reviewed and some may not be funded.

### 7. What is the rationale for conducting Chevron Humankind only in the United States?

We are evaluating the opportunity to expand the program globally. A number of factors must be evaluated, such as access to payroll data, vetting of international nonprofit organizations, coordination with local programs, and cultural differences related to volunteering and financial contributions.

## Matching Grants

### 8. What are matching grants?

Matching grants are Chevron Humankind's means for administering matching funds for financial contributions made by employees and retirees to the nonprofits of their choice.

Through matching grants, employees and retirees can request a corporate match for a cash, check, credit card or stock contribution given directly to a nonprofit (Offline Giving).

Employees and retirees can make online contributions and apply for a matching grant using a credit card on the Chevron Humankind Website (Online Giving).

Employees have the additional capability of donating and matching through a payroll deduction (Payroll Giving).

### 9. How much of my giving will Chevron Humankind match?

If you are an employee, Chevron Humankind will match up to \$10,000 of your giving to eligible recipient nonprofits each year. For retirees, the matching dollar amount is \$3,000 per year.

Volunteer matching grants count toward the \$10,000 annual cap for employees and the \$3,000 annual cap for retirees.

### 10. How will I know I'm getting close to my individual cap on matching funds?

Review your donation history on the Chevron Humankind website to determine how close you are to your individual cap.

*To review your donation history:*

- a. Go to the <http://www.chevronhumankind.com>
- b. Click **Give** in the top navigation tabs and select **Donation History** from the list
- c. Click **Other Donations**
- d. Your **Match Summary** will be displayed on the right, it includes a **Remaining Match YTD USD** line item

### 11. Will Chevron Humankind match the money I collect from co-workers and neighbors for a charitable cause?

No. Chevron Humankind matches only those dollars that come out of your own pocket. Matching is based on annual caps (\$10,000 for each employee and \$3,000 for each retiree). Chevron employees and retirees must request matching funds individually, and the nonprofit must be able to verify that it has received their contributions. See Chevron Humankind Guidelines for more details on eligible participants.

### 12. How do I sign up for matching grants when I give directly to nonprofits by check, credit card or stock contribution?

Go to <http://www.chevronhumankind.com> and click the **Give** tab. On the drop-down list you can select **Record Offline Donation** and fill in the details of your donation.

Credit card deductions will be processed through the Chevron Humankind system as directed by the employee. However, if Chevron is unable to deliver funds as directed or the charity fails to cash a check prior to 180 days, the issued check will be voided. In this case, employees will be provided the option to redirect funds to a new eligible charity. If the employee fails to take said action, Chevron will donate the outstanding funds to Chevron's charity partner of choice, **Project Lead the Way**.

**13. What is the deadline for requesting a match after making a financial contribution directly to a nonprofit?**

When you make a direct contribution, you have until January 31 of the following year to submit a match request.

**14. How does matching work when I want to contribute to nonprofits through Payroll Giving?**

If you are an employee that wishes to give via payroll, go to <http://www.chevronhumankind.com> and click the **Give** tab. On the drop-down list select **Payroll Deduction**.

You'll have the option to make a one-time or recurring donation. Select your nonprofit and deduction amount, and click **Schedule Deduction**.

Payroll deductions will be processed through the Chevron Humankind system as directed by the employee. However, if Chevron is unable to deliver funds as directed or the charity fails to cash a check prior to 180 days, the issued check will be voided and any recurring payroll deductions to this organization will be stopped. In this case, employees will be provided the option to redirect funds to a new eligible charity. If the employee fails to take said action, Chevron will donate the outstanding funds to Chevron's charity partner of choice, **Project Lead the Way**.

**15. What is the sign-up period for matching grants?**

On the Chevron Humankind website, you can request a match 24/7 for any contribution you make directly to a nonprofit. You have until January 31 of the following year to submit a match request.

**16. Is there a minimum contribution I need to make in order to obtain a match?**

Yes. Specific to **matching grants**, contribution minimums to qualify for matching funds are as follows:

- A one-time contribution made directly to a recipient organization must be at least \$20.
- A one-time payroll contribution must be at least \$20.
- A recurring payroll contribution must be at least \$10 per pay period (equivalent to \$20 per month).

**17. When will the nonprofit I'm supporting receive funds?**

Chevron Humankind processes payments in monthly cycles. As a result, the entire process (including verification of your donation when applicable, approval of the match and approvals for the allocation of funds) typically takes eight to ten weeks. However, requests may have different approval requirements. Please read below for details on how the various processes work so you can understand why a payment may take *many months* to be sent.

*Note:* We strongly encourage people to not make promises to their nonprofit recipients about matching funds as they may not be approved or may take a very long time to arrive in some cases.

**Online Giving:**

*(Payroll and Credit Card donations made via the Chevron Humankind Website)*

Payroll giving and credit card donations are sent to the nonprofit along with the Chevron match, on the same check. In other words, a single check is sent to the nonprofit organization each month that includes both your contribution and the Chevron matching funds. As a result, the final payment from Chevron can take eight to ten weeks to be processed after the payroll or credit card contribution has been deducted.

*Note:* New payroll deduction requests take approximately two pay cycles to begin withdrawing the donation from your paycheck.

**Offline Donations:**

*(Check, cash, credit card or stock donations given directly to a nonprofit)*

Since your donation was not made via the Chevron Humankind website it needs to be verified before Chevron will provide matching funds. As a result, matching grant requests for Offline Donations will require a receipt to be provided along with your request. Please reference the [Grant Request Guide](#) for examples of acceptable receipts.

*Note:* Match requests for larger offline donations may require verification from the nonprofit and therefore may take longer to process.

#### **18. How can I access your database of eligible nonprofits for browsing?**

A search function is provided to help you find and select your charities.

Go to <http://www.chevronhumankind.com> and click on **Search Organizations** on the **Charities** tab. From there you can search for your nonprofit. If you're not requesting a match, you can still search the database and add charities to your favorites.

Once you locate a nonprofit you would like to give to, click the **Add to my charities** link. This will add it to a list of your favorite nonprofits available in a dropdown list on the various giving pages throughout the site.

#### **19. Why are some nonprofits not listed in the search results or listed as 'Not Accepting Donations'?**

Unfortunately, not every 501(c)3 organization is eligible to receive matching grants from Chevron Humankind.

- If a nonprofit is not listed in the search results it is *not eligible* to receive matching funds from Chevron. If you are having trouble finding a nonprofit you can contact YourCause support for assistance at [chevron-support@yourcause.com](mailto:chevron-support@yourcause.com).
- When a nonprofit is listed as 'Not Accepting Donations', the system is letting you know that the organization is in one of the following situations and is therefore *not eligible* to receive matching funds as a result:
  - They are no longer in good standing with the I.R.S. and/or have lost their charitable organization status (they must be listed on I.R.S. Publication 78)
  - They are not registered on Guidestar.org
  - They have chosen to not accept funds online, via Guidestar

If you would like help resolving one of the above issues for a nonprofit you give to or you suggest an organization be added to the system, our client service team at YourCause ([chevron-support@yourcause.com](mailto:chevron-support@yourcause.com)) will contact the nonprofit and provide them with instructions on the steps they can take to get listed. Due to the large numbers of nonprofits and the various requirements they must each manage for themselves, we cannot guarantee an organization will be able to be deemed eligible. In the best of situations this process will take many months. Therefore, organizations who are not currently in the database or are presently listed as 'Not Accepting Donations' are unlikely to be funded within the calendar year.

#### **20. If I can't find a nonprofit in the Chevron Humankind database of eligible nonprofits, can I have it added?**

All charities registered with the I.R.S. are included automatically in the new YourCause database. A search function is provided to find and select your charities.

Charities are listed by their legal name which may be different from how they are known in the community. Private schools and some other organizations will be listed under the name of the parent organization. In this case you need to request a match to the parent organization and add a designation to the local nonprofit. It is also important to note that as of 2012 the I.R.S. requires all funds be paid to the parent organization for distribution to the chapters or affiliate organizations. If you are having trouble with a designation, please email [chevron-support@yourcause.com](mailto:chevron-support@yourcause.com).

If you are unable to find your nonprofit by its name, you may also search by the nonprofit's Employer Identification Number (EIN). You can locate the EIN by:

- a. Search Google for: “(Name of charity) form 990”.  
*The EIN should appear on the top right of the form 990, line ‘D’.*
- b. Use this EIN number to search for your charity on the Chevron Humankind system by typing it into the ‘Search by EIN’ box.
- c. If the charity found is correct, click ‘select’, ‘save’ and ‘schedule deduction’.

If your charity is NOT found in the search results you can click **Suggest a new org** on the search results page or on the Help page under the Info/Resources tab.

*Note:* Suggesting a new organization will alert YourCause customer service to contact the organization with instructions for becoming eligible. However, it is up to the organization to follow this procedure. Therefore, **suggesting an organization does not guarantee that they will be added to the system or be eligible to receive a matching grant.**

## 21. What are the special considerations for supporting charitable fundraising events such as walks and runs through Chevron Humankind?

Chevron Humankind will:

- Match employee and retiree financial contributions made directly to charitable fundraising events held by eligible nonprofits.
- Provide a Volunteer Grant for an employee’s or retiree’s volunteer time for an eligible nonprofit that holds a charitable fundraising event.

Guidelines for individual caps and eligible recipient organizations apply.

**If you sponsor a participant:** To be matched, your financial contribution to a charitable fundraising event must be personal funds of at least \$20 in the form of cash, personal check or credit card charge; support through the company’s payroll giving program is not available. Your contribution made by check must include your name in the payer section of the check. A credit card used to make a contribution to a charitable fundraising event must show your name on its face.

Because matching is based on individual annual caps (\$10,000 per employee and \$3,000 per retiree), funds pooled from multiple sources are ineligible for matching.

You must submit your own match request when you sponsor an event participant; event participants are not responsible for requesting matching funds for the Chevron employees and retirees who sponsor them. You can sponsor more than one participant per event, but you must make a contribution to each participant and request matches separately.

**If you participate in a charitable fundraising event:** If you sponsor yourself, be sure to request a match for your contribution made with personal funds. However, do not request matching funds for the Chevron employees and retirees who sponsor you. Please note: Event entrance fees are not eligible for a corporate match. In addition, your participation as a walker or runner (or the like) does not count as volunteer time for obtaining a Volunteer Grant; nonprofit organizations that sponsor such events cannot verify participant hours.

**If you volunteer at a nonprofit that holds a charitable fundraising event:** The time you spend volunteering at a nonprofit holding a charitable fundraising event is eligible volunteer time under Volunteer Grants. Time spent participating as a runner or walker (or the like) or obtaining pledges does not because it cannot be verified by the nonprofit.

As with financial contributions, volunteer time accrued for obtaining a Volunteer Grant must pertain to an individual employee or retiree. See the Volunteer Grants section of this FAQ for more information about pooled hours.

## 22. How will I know Chevron Humankind has received my request for matching funds?

After you complete a request online, you’ll receive an email from us that confirms your request.

## 23. How do I know my match request has been approved?

After your request has been approved you will be sent an email confirmation. You can also review the status of your match request on the Chevron Humankind website.

*To review your donation history:*

- a. Go to the <http://www.chevronhumankind.com>
- b. Click **Give** in the top navigation tabs and select **Donation History** from the list
- c. Click **Other Donations**
- d. Your **Match Summary** will be displayed on the right, it includes a **Pending Matches** line item

#### **24. My personal information has changed. Should I notify Chevron Humankind?**

Whether you're an employee or retiree, you do not need to notify Chevron Humankind of any changes in personal information. Such information is refreshed twice a month in our system from HR/Whitepages data.

### **Volunteer Grants**

#### **25. How do I volunteer through Chevron Humankind?**

Go to <http://www.chevronhumankind.com> and follow these steps:

- a. Click **Volunteer** in the top navigation tabs and select **Search Events** from the list
- b. To view projects of your interest, enter search criteria, and click **Search**
- c. Select a project from among the search results
- d. Click **Participate**. Your name will be added to the team roster.
- e. When you return to the **Volunteer** home page, click **My Volunteering** to view your event list.

#### **26. Can I volunteer during regular work hours?**

For any volunteer activities that occur during normal work hours, you would need your supervisor's approval to take time off to volunteer.

#### **27. Can contractors volunteer at Chevron-organized projects?**

Yes, contractors can participate in Chevron-organized volunteer projects, however, are not eligible to request matching grants.

#### **28. How do Volunteer Grants Work?**

Through Chevron Humankind, you can obtain grants for the nonprofit organizations where you volunteer.

Volunteer 20 hours for a single nonprofit and request a grant for \$500. You can obtain two grants of \$500 per calendar year. They can be for the same or different organizations.

The maximum for Volunteer Grants is \$1,000, which counts toward your individual cap on matching funds (\$10,000 per employee per year and \$3,000 per retiree per year).

#### **29. What qualifies as volunteer time?**

Volunteer time that qualifies for obtaining a Volunteer Grant:

- Must reflect the efforts of an individual employee or retiree and not a group of employee or retiree volunteers. Because matching is based on individual annual caps (\$10,000 per employee and \$3,000 per retiree in matching funds and volunteer grants combined), hours pooled from multiple sources do not qualify for obtaining a grant.
- Can accrue from personal or company-sponsored efforts.
- Must amount to at least 20 hours of service with a single nonprofit.

- Must be verifiable – that is, the nonprofit where an employee or retiree serves must be able to verify the dates and times he or she has spent volunteering there.
- Can include time spent in training that is conducted by and that can be verified by the nonprofit.
- Does not include personal preparation or commute time.

**30. When do volunteer hours start to count?**

Volunteer hours accrue January 1 through December 31 and do not roll over year to year.

**31. What are the procedures for requesting a grant?**

First, you must log your volunteer hours on the Chevron Humankind [website](#) by clicking **Log New Hours** under the **Volunteer** tab. You can log the hours as you accrue them or when you complete 20 hours of volunteer time with a single nonprofit. Once you have entered 20-hours (or more) you will be provided with the option to request a matching grant.

Once you submit your request, we will contact your nonprofit to verify your volunteer hours. After verification, we will send the grant to your nonprofit. This post verification payment process will take six to eight weeks.

**32. What is the deadline for requesting a Volunteer Grant after volunteering at an eligible nonprofit?**

After you have volunteered at a single nonprofit for at least 20 hours within the calendar year, you have until January 31 of the following year to submit a grant request.

**33. How many grants can I obtain in a year?**

Each year, you can obtain as many as two \$500 grants for a total of \$1,000 per year.

**34. Is there a limit to the number of Volunteer Grants that a nonprofit can receive?**

No. There is no limit to the number of employees and retirees who can submit Volunteer Grants to a single nonprofit.

**35. Do I have to request a grant for a specific program or event, or is a grant intended for a nonprofit's use at its discretion?**

Nonprofits may use the Volunteer Grant funding at their own discretion.