

2024 | 2:1 Match Frequently Asked Questions

INDEX

- [2:1 Gift Eligibility & Deadlines](#)
- [Caterpillar Participant Eligibility](#)
- [Charity Eligibility](#)
- [Accessing System / Login](#)
- [Charity Support](#)
- [Data Privacy](#)

2:1 GIFT ELIGIBILITY & DEADLINES

1. Is there a minimum or maximum donation amount for the Giving Tuesday 2:1 match program?

The gift minimum is \$25 USD. Each Caterpillar participant may enter up to \$500 USD in donations in the online system to be matched at a 2:1 ratio up to \$1,000 USD. Refer to questions 4 and 5 if your donation was more than \$500 USD.

2. What is the deadline to enter match requests for the Giving Tuesday 2:1 match?

Eligible gift dates are December 2-6, 2024. The match request must be submitted **by December 6, 2024, at 11:59pm ET to be eligible**. The charity must then confirm your match request in our online system **by February 15, 2025, at 11:59pm ET** to be considered eligible for the 2:1 match.

3. Can I donate to multiple charities and have multiple gifts matched 2:1?

Yes, you may apply for matches to multiple charities in the online system. There is no limit to the number of charities. The gift minimum per charity is \$25 USD. You may only apply for up to \$500 USD in our Giving Tuesday 2:1 Matching Gifts Program portal, which would be matched at a 2:1 ratio up to \$1,000 USD.

4. What should I do if I make donations December 2-6, 2024, that exceed the Giving Tuesday 2:1 match program cap of \$500 USD (to be matched up to \$1,000 USD)?

You may submit up to \$500 USD in our Giving Tuesday 2:1 Matching Gifts Program portal which would be matched at a 2:1 ratio up to \$1,000 USD. You may submit a match request for the remainder of any donation over \$500 USD through our standard year-round 1:1 Matching Gifts Program (if you have not reached the \$10,000 annual cap).

Recommended Method: If your donation exceeds \$500 USD to a charity, we recommend (if possible) to pay the donation to the charity in multiple payments to participate in both the 2:1 and 1:1 Matching Programs.


Example: If you plan to make a \$750 donation to a charity, make a \$500 donation to the charity and apply for a 2:1 match request through the Giving Tuesday 2:1 Match portal. Then, make a second \$250 gift to the charity and apply for a 1:1 match request through the standard 1:1 Matching Gifts Portal (\$10,000 USD cap). This method would ensure your \$750 USD gift is matched at \$1,250 USD (\$1,000 in the 2:1 portal and \$250 in the 1:1 portal), making it easier for the charity to confirm your multiple match requests.


WEBSITE

 caterpillar.com/matching-gifts

QUESTIONS?


Employees & Retirees:

 Matching_Gifts@cat.com

 309-494-3583

Charities (*new effective 2023*):

 caterpillarsupport@cybergrants.com

 1-855-777-6323

5. **I donated more than \$500 USD during the Giving Tuesday 2:1 match timeframe to multiple charities. Am I able to have a portion of each of my gifts matched so they all benefit from the program?**

Yes, in the online system you may decide the match amount you would like allocated to each of your registered gifts. It is up to each eligible Caterpillar participant to decide which of their charitable contributions they would like to have matched each year.

Example: If on December 2, 2024, you give \$500 USD to Charity A and \$500 USD to Charity B, you may request that \$250 USD of your Charity A gift is matched, and \$250 USD is matched to the Charity B to stay within your \$500 USD 2:1 limit. You may also apply for a 1:1 match for each charity for the remainder of any donations over \$500 USD following the instructions in FAQ #4.

6. **Are all currencies eligible for matching?**

Donations must be made directly to the charity using any currency accepted by the charity. When requesting a match, you can indicate the currency used, and the system will convert the amount to U.S. dollars for matching purposes based on the date the gift was made.

7. **May I collect money from others and submit it for matching?**

No, you may only submit donations you personally made using your own funds. You may not collect money from others and submit it as your own. If other Caterpillar employees donate to your cause, they are welcome to submit their own donations for matching as well.

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.

8. **Is my auction payment, attendance fee or other similar fee eligible?**

If your donation was required to participate or enter, it is not eligible. Also, if you donated and received something in return, the value of that item is not eligible. The charity will have the opportunity to indicate the tax-deductible amount of the donation when confirming receipt of your match request.

Examples: Auction: If you paid \$500 for an item worth \$300, only the difference (\$200) is considered tax-deductible and eligible for matching. College Athletics: If you donated \$1,000 to your college or university for athletics and receive benefits (such as tickets), you must declare the value of the benefit or item when submitting for matching, because that portion is not eligible. Usually, the tax receipt provided by the charitable organization will outline the difference for you. If you have any questions, please contact the charity or your tax advisor.

9. **Will the Caterpillar Foundation matching gift follow to my original designation within the charity?**

If your donation was made for a specific purpose (such as a specific program, department, project and so on), you may indicate that when requesting the match. However, please note that the Caterpillar Foundation's matching payments are made to the charity's general fund and are **unrestricted**. Caterpillar participants can complete the Designation field on the match request, but disbursement of the match funds is determined by each charity. You may follow up directly with the charity to inquire about its disbursement process, however donors cannot direct how Caterpillar Foundation funds are applied.

CATERPILLAR PARTICIPANT ELIGIBILITY

10. **Who is eligible?**

Eligible Caterpillar participants are limited to global active, full and part-time Caterpillar and Solar employees on Caterpillar payroll, U.S./Canada Progress Rail employees on Progress Rail payroll, U.S. Caterpillar retirees, and Caterpillar Board of Directors. *Caterpillar employees in China; Kazakhstan and international Progress Rail employees may be eligible in a future phase of the program's development.*

11. Who is not eligible?

Ineligible participants include Caterpillar employees in China, Kazakhstan, non-U.S./Canada international Progress Rail employees, contract/agency employees, posthumous Caterpillar employees and retirees, or surviving spouses.

CHARITY ELIGIBILITY

12. Which charities qualify and are eligible to participate?

The Caterpillar Foundation Matching Gifts Program includes thousands of global charities that meet the program's required criteria. Eligible charities are automatically loaded into our system from a variety of global databases to provide a broad list of options. There are many choices, including health & human service, civic & community, education, environmental, arts & culture, and more.

Please note, all organizations and gifts are reviewed on an ongoing basis to determine compliance with program guidelines. An organization's inclusion in the system is not necessarily a guarantee of eligibility. Reference questions 13 and 14 for more information.

13. U.S. payroll employees and U.S.-based retirees: Which charities are eligible?

To search for eligible charities, login to the Caterpillar Cares portal which is linked directly to the IRS and NCES databases and pulls through eligible options. Eligible charities must be recognized by and registered with the United States IRS as a current 501(c)(3) nonprofit organization (<https://apps.irs.gov/app/eos/>); or accredited public/private preK-12 schools or school districts (<https://nces.ed.gov/globallocator/>). Organizations classified as "Ineligible Charities & Gifts" can be found in the standard matching gifts guidelines located at caterpillar.com/matching-gifts.

14. Employees on non-U.S. payroll: Which charities are eligible?

To search for eligible charities, login to the Caterpillar Cares portal which is linked directly to the databases below and pulls through eligible options. If you need assistance locating a charity in our database, please email Matching_Gifts@cat.com.

Australia – Eligible charities must be recognized by and registered with the Australian Business Register as a DGR Item 1 charity:

- <https://www.acnc.gov.au/charity>

Canada – Eligible charities must be recognized by and registered with the Charities Directorate:

- https://apps.cra-arc.gc.ca/ebci/hacc/srch/pub/dsplyBscSrch?request_locale=en

United Kingdom – Eligible charities must be recognized by and registered with the UK Charity Commission:

- <https://www.gov.uk/find-charity-information>
- If you do not see your charity listed, you may suggest that the charity contact the countries registering entity to be reviewed and included in their directory. Please keep in mind that these charities will still need to comply with Caterpillar Foundation guidelines, so inclusion in the list is not a guarantee of eligibility for our program.

United States – Eligible charities must be recognized by and registered with the United States I.R.S. as a current 501(c)(3) nonprofit organization or accredited public/private preK-12 schools or school districts:

- <https://apps.irs.gov/app/eos/>
- <https://nces.ed.gov/globallocator/>

Other Countries – Eligible charities must be recognized by and registered with the Charities Aid Foundation America (CAFA).

- [Click here](#) to view a list of registered and eligible CAFA charities by country (as of 01/30/2024).
- If you do not see your charity listed in the Caterpillar Cares portal search, you may suggest that the charity contact CAF directly to be reviewed. The charity should email benjamin@cafamerica.org. Please note that the charity may need to pay a validation fee to be reviewed. Once CAF reviews and approves the charity, it will soon be available for selection on our Matching Gifts site. Please keep in mind that these charities will still need to comply with Caterpillar Foundation guidelines, so inclusion in the list is not a guarantee of eligibility for our program.

Please also reference “Ineligible Charities & Gifts” in the full matching gifts guidelines located at caterpillar.com/matching-gifts.

15. Which charities are not eligible?

For the full list of restrictions, please review the guidelines above.

16. Can I receive a match for a donation to my church?

Houses of worship are not eligible if they are specifically classified by the IRS or other internationally recognized entity as a church. However, other faith-based community service organizations or schools may be considered if they are open to all individuals in the community regardless of religious belief, service a secular purpose (such as a food pantry, homeless shelter, or education), and do not use the individual donation or resulting match for religious purposes. **If the U.S. charity is classified by the IRS as a church with the specific classification of 170(b)(1)(a)(i), it is not eligible for the program.**

17. I have had previous donations matched, but now the charity isn’t eligible. How is that possible?

Sometimes an organization may lose its eligibility status due to a penalty, an oversight, or an error on the IRS or International electronic database. Until it is resolved between the charity and the recognized entity, the Caterpillar Foundation is unable to match to the charity. Please note that the Caterpillar Foundation also reviews each gift and charity prior to making a matching payment so it is possible the charity is no longer compliant with the program guidelines.

18. Does a donation to United Way qualify for the Giving Tuesday 2:1 match?

Yes, many United Way chapters globally are eligible and approved in the online system and would qualify for the Giving Tuesday 2:1 match.

ACCESSING SYSTEM / LOGIN

19. I am getting an error when I try to login. Why can’t I access the Matching Gifts System?

Current global Caterpillar/Solar employees should use the Single Sign On link (gray box hyperlink) on the login page to access the site using your CWS ID/Password.

All Retirees and U.S./Canada Progress Rail employees should use the Standard Log In section to log in, as single sign on is not available for this group. If you have never accessed the site, please use the “First Timer User? Create your password” link. *Your Employee ID Number is your Caterpillar/Solar HR ID (formerly known as PeopleSoft ID) or Progress Rail ID.*

Caterpillar employees in China, Kazakhstan and international Progress Rail employees are not eligible at this time. The Foundation is exploring eligibility in a future phase of the program’s development.

CHARITY SUPPORT

20. What is the deadline for charities to verify the match request in the Caterpillar Cares portal?

The deadline to confirm the match request for the Giving Tuesday 2:1 match is February 15, 2025.

21. I’m a charity and I received the match request via email or mail from the Caterpillar participant. What process should I follow to ensure I successfully verify the gift?

- Please follow the detailed instructions that are emailed or mailed to you to ensure you successfully register as a first-time user or login as an existing user. If registering as a first-time user, you must use the Access Code provided on the form. If you did not receive an access code, please email Matching_Gifts@cat.com.
- Once logged in, please click on the “2:1 Match” option (black box) in the Confirm Donations section of your home page.
- You will then be asked to provide information on your charity, as well as your ACH details.

- Once the organization information is completed, you will see the match request listed, where you can then click on the gift ID and enter the tax-deductible gift amount.
- Please make sure you get to a confirmation page that states you have successfully confirmed the match request.

22. I'm a charity and I thought I successfully verified the match request I received, but I keep getting reminder emails stating that it is still outstanding. What should I do?

If you keep receiving reminder emails about an outstanding match request, it means that you did not complete the full verification process. Please log back into the Caterpillar Cares portal, click the "2:1 Match" option in the Confirm Donations section and click through all the organization screens until you get to a page where the match request is displayed. Click on the gift ID and enter the tax-deductible gift amount. Make sure you get to a confirmation page that states you have successfully confirmed the match request.

23. I'm a charity and when confirming the match request, why am I required to provide ACH information? Are you able to send a paper check instead?

The Caterpillar Foundation is unable to match donations via paper checks. Our only available form of payment for matching donations is via ACH.

24. I'm a charity and a Caterpillar participant applied for a match for the same gift in both the Giving Tuesday 2:1 Match portal and the 1:1 Matching Gifts Portal. Is this permitted?

Caterpillar participants have a Giving Tuesday 2:1 match cap that allows them to enter up to \$500 USD in donations to be matched at a 2:1 ratio up to \$1,000 USD, if they donate more than \$500 USD (and still have a remaining balance available in their 1:1 program cap), it is possible they may apply for a portion of their gift to be matched at 2:1 and part of their gift to be matched at 1:1.

Example: If the Caterpillar participant makes a \$750 USD gift to a charity on December 3, 2024, they may enter a match request for \$500 USD in the 2:1 matching portal (to be matched at \$1,000 USD). They may then also apply for a second match request in the 1:1 matching portal for the remaining \$250 USD (to be matched at \$250 USD). That would ensure the \$750USD gift is matched at \$1,250 USD.

25. When will charities receive the match payment from the Caterpillar Foundation for the Giving Tuesday 2:1 matches that have been successfully confirmed?

If the charity successfully verifies an eligible Giving Tuesday 2:1 match request by the **verification deadline of February 15, 2025**, the Caterpillar Foundation will **execute an ACH match payment to the charity by March 2025** (potentially sooner depending on the gift confirmation date). Charities will receive an email when the ACH payment is sent to their bank account.

Please ensure that when you verify the gift, you carefully enter your ACH information to ensure the transaction successfully transfers and does not fail, resulting in a delay in payment.

International Charities: To comply with international giving processes, all international match payments are processed through our intermediary partner, Charities Aid Foundation America (CAFA). Once CAFA obtains all required documentation from the international charity, they will process payments. This process can take an additional 6-8 weeks.

DATA PRIVACY

26. What sort of data privacy does the Caterpillar Foundation provide with this program?

Information provided to the Caterpillar Foundation is processed consistent with Caterpillar's Data Privacy Policy. This information will be used to process the gift and may be used to contact you in the future regarding Caterpillar Foundation Matching Gifts Program notifications and updates. Notwithstanding the above disclosure, we will provide personal information when required or permitted by law or for purposes relevant to Corporate Policies. By providing information you agree to the above uses of your personal information. Caterpillar does not provide charities with employee contact information. Please also see the Privacy Policy for the Caterpillar Foundation's third-party vendor, CyberGrants:

<https://impact.cybergrants.com/privacy-policy/>