



45195 Business Court
Suite #240
Sterling, VA 20166

HR Standard Operating Procedures for Charitable Donation Matching at Northstrat

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Procedure Objective

The objective of this document is to present a standard procedure for the implementation of the Northstrat (NS) Employee Charitable Donation Matching Program. The intent of this document is to standardize and record the process for execution of the program. This procedure is for use by Human Resource (HR) department personnel.

Northstrat Culture

A strong organizational culture is vital to Northstrat's success. Northstrat believes that culture affects leadership, employee commitment, customer satisfaction, and innovation. Northstrat culture is intended to be one of engagement, inclusion, acceptance, and participation.

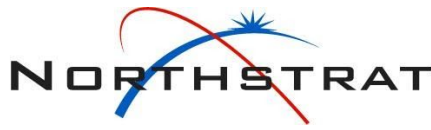
Organizational culture shapes the way people make decisions, prioritize, get their work done, and how they interact with colleagues and customers. The Employee Charitable Donation Matching program is a vehicle for supporting company culture by supporting employees and what they feel is important.

Northstrat (NS) Employee Charitable Donation Matching Program

In support of Northstrat's commitment to building an empathetic culture of caring for and giving to others, the NS Employee Charitable Donation Matching Program encourages full and part time employees to contribute to causes they care about by doubling the impact of their donations with company matching.

Features

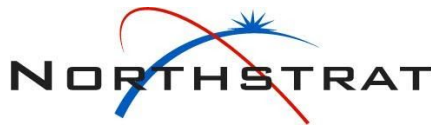
- Dollar-for-dollar monetary donations matched up to \$500 per employee, per calendar year.
- Open to full-time and part-time employees.
- Gifts may be made via cash, check, or credit card.



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Program rules:

- Northstrat does not match donations to any organization that discriminates based on any of the U.S. federal and state protected characteristics of age, race, national origin, religion, color, sex /sexual orientation, gender / gender identity, political ideology, pregnancy, veteran, or disability status.
- Gifts can be from employee or immediate family member (significant other)
 - All matched donations apply against employee maximum for the year.
- Contributions must be paid directly to organizations (cash, check, credit card, securities, etc.).
- NS will match qualified donations to domestic or foreign entities that meet the following guidelines:
 - Eligible U.S. Charitable Organizations: Charitable organizations in the United States must be tax-exempt under section 501(c)(3) of the Internal Revenue Code with a valid, current tax ID number and not be classified as a private foundation or supporting organization.
 - Accredited Public PreK-12 Schools or School Districts in the U.S. to which contributions are tax deductible under the Internal Revenue Code of the United States; or
 - Accredited Public or Non-Profit Colleges and Universities in the U.S. to which contributions are tax deductible under the Internal Revenue Code of the United States
 - Charitable Organizations located in England or Wales must be registered with the United Kingdom Charity Commission [About the register of charities \(charitycommission.gov.uk\)](http://charitycommission.gov.uk).
 - Charitable organizations outside of the United States, England or Wales must be qualified as eligible for donations from Charities Aid Foundation-America (CAF America).
 - In accordance with the U.S. Patriot Act, U.S. companies must follow strict guidelines for processing contributions to foreign entities to ensure that these organizations do not in any way support terrorism. If employee is not sure whether a group is eligible, Donor Tool on the [CAF America](#) page can be used to research donation.
 - Donations made to charities outside the U.S. may incur additional fees which will be included in matching total.
 - The matching donation payment may be paid to the recipient charity through Charities Aid Foundation (CAF) and therefore may take slightly longer.
- Northstrat will match funds raised in sponsorship of active events where employee is the active participant and collects donations based on their activity.



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- You can collect funds from other Northstrat'ers or any person wishing to assist employee in their fundraising effort and submit the total dollar amount of the funds raised for match.
 - Funds donated by other Northstrat employees can only be matched once as part of the collected total.
- Employee must participate in the event in the same fiscal year that matching gift request is made.
- The funds must be raised through employee's individual, personal effort.
- Northstrat will not match contributions that directly or indirectly benefit the donor, his/her family, or other person designated by the donor such as:
 - Tuition or other student expenses (including books, services, fees, T&L for volunteer trips, and so on).
 - Individual, family or group membership fees/dues, including alumni dues and subscription fees.
 - Donations to a university/college athletic association that allows the donor to purchase tickets to a sporting event.
- Matching donations for gifts made within the calendar year must be requested by December 31st.
- Matching gifts will be made directly to the recipient organization via Northstrat credit card or company check.
- Payments will be made within seven (7) days of receipt of employee request and receipt.

Gift Matching Process

- Once a donation has been made present receipt of payment via email or hardcopy to Northstrat Human Resources (HR) department for matching.
 - Upon receipt of request HR personnel will acknowledge receipt of request in return email.
- Matching contributions will be recorded in Northstrat Charitable Gifts and Donations Tracker tool located at (not accessible outside of HR group). Data recorded and tracked consists of;
 - Donor name (firstname lastname format)
 - Organization name
 - Donation Date (mm/dd/yyyy format)
 - \$ Value of donation
 - Donor Sum of Donations in table on right is updated and verified against individuals available matching balance.



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- Matching Payment Value (this amount may be less than donation amount based on verified amount in previous step.
 - Total Matching Payment Value cannot exceed \$500 per donor per year but donors can donate in excess of \$500 of their own accord).
- HR will mail to employee when Matching Payment has been made.
- Employees can follow up on the matching gift with the receiving nonprofit organization directly to confirm verifies the employee's donation and/or has received the matching gift ten (10) post their request for matching.