



## Employee Giving, Volunteer Incentive, & Matching Gifts Programs

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## ONLINE EMPLOYEE GIVING & VOLUNTEER PORTAL

### **Q1. What is the online Employee Giving and Volunteer Portal (the “Portal”)?**

A1. The Employee Giving and Volunteer Portal serves as Marathon’s (MPC) one-stop shop for the Employee Giving and Volunteer Program. It is accessible from an MPC computer 24/7, making it easy for MPC employees to make contributions, track their giving and request matching funds to support the communities where we live and work.

### **Q2. What am I able to do in the Portal?**

A2: Employees can take advantage of MPC’s Employee Open Giving Program, Matching Gifts for Higher Education, and the Volunteer Incentive Program (VIP) all in one place.

Payment options for giving include payroll deduction, credit card, or offline (qualifying monetary donations made directly to a charitable organization and recorded in the Portal with the appropriate documentation).

### **Q3. Who is eligible to access the Portal and take advantage of MPC’s Employee Giving, Matching Gifts for Higher Education and the Volunteer Incentive Program (VIP)?**

A3. Eligibility for these programs is open to active, full-time, part-time, intern, co-op and casual MPC employees. Additionally, current non-employee board of directors of MPC and current non-management board of directors of MPLX GP LLC are eligible for the Employee Open Giving Program and Matching Gifts for Higher Education only.

### **Q4: What if I’m a retiree?**

A4: Retirees are not eligible to participate in the Employee Open Giving Program, Matching Gifts for Higher Education & VIP.

### **Q5. Who administers the online Portal?**

A5. YourCause, located at 6111 West Plano Parkway, Suite 1000 YC, Plano, TX, 75093, administers the Employee Giving & Volunteer Portal for MPC employees. YourCause general support is [marathonpetroleum-support@yourcause.com](mailto:marathonpetroleum-support@yourcause.com).

All questions about the program should be directed to Community Relations Specialist Karyn Kamphaus via email at [kmkamphaus@marathonpetroleum.com](mailto:kmkamphaus@marathonpetroleum.com).

## EMPLOYEE OPEN GIVING PROGRAM

### **Q6. What is an Employee Open Giving Program?**

A6. Employee open giving programs can take many different forms, but they are typically internal programs that offer employees the opportunity to make a charitable contribution through a company-sponsored promotion or platform.

Under the Employee Open Giving Program, employees can make donations to any 501(c)(3) nonprofit organization or qualifying government instrumentalities located in the United States, with some exceptions, such as religious and political organizations. See the Employee Giving & Volunteer Program Guidelines for a detailed explanation of eligible and ineligible organizations.

**Q7. Can I designate how I would like an organization to use my donation?**

A7. Yes, you can use the designation field in the Portal to make notes on how you would like your donation designated.

**Q8. Can I participate in the Employee Open Giving Program via paper form?**

A8. All requests are to be completed by using the Portal. Donations or match requests will not be accepted via paper form.

**Q9. How do I enter a donation in the Portal? What payment options are available?**

A9. To make your donation, log in to the Portal and click on “Give” banner. Select the charitable organization you wish to donate to by using the Portal search function.

You can elect to pay via one-time or recurring payroll deductions and/or via credit/debit card. You can also elect to record an offline donation (qualifying monetary donations made directly to a charitable organization and recorded in the Portal with the appropriate documentation).

*\*Note:* To ensure that your donation is matched, you must select the “Apply for Match” during the checkout process.

**Q10. Will MPC match the donations made during my local giving campaign pledge period?**

A10. Yes. MPC will match employees’ donations for the current calendar year. MPC reserves the right to alter the Company’s match amount without notice.

**Q11. Is there a limit to how much MPC will match on my donations?**

A11. Yes. There is a \$10,000 cap per employee per calendar year for matching donations.

*\*Note:* the above-referenced program match is separate and in addition to the Matching Gifts for Higher Education match.

**Q12. If I elect to donate via recurring payroll deductions, when will the deductions begin and how long will they last?**

A12. Payroll deductions will begin within 2-3 pay periods.

Recurring deductions will continue until you adjust or cancel the deduction through the Portal.

**Q13. Will I be able to stop, change or cancel my recurring payroll deduction in the Portal?**

A13. Yes, new donations, as well as change and cancellation requests for recurring payroll deductions, can be initiated directly in the Portal. Payroll deduction cancellations made in the Portal may take 2-3 pay periods to realize on your paycheck.

**Q14. I currently have a payroll deduction that was set up in the previous calendar year, will this deduction continue in the new calendar year?**

A14. Yes. All reoccurring payroll deductions are evergreen and will continue year to year until the employee logs into the Portal to facilitate any modifications.

**Q15. Is the match for Employee Open Giving separate from Matching Gifts for Higher Education?**

A15. Yes. While both match programs will be facilitated through the Portal, the Employee Open Giving Program will be administered and promoted separately from the Matching Gifts for Higher Education.

\*See Matching Gifts for Higher Education section below for additional details.

**Q16. What other limitations are there to the types of organizations that I can direct matching gifts and/or VIP grants to?**

A16. The following types of organizations are not eligible under the Program, even with a valid 501(c)(3) designation: religious institutions; political institutions; private/family foundations or personal trusts; organizations that create a conflict of interest or reputational risk for the Company; organizations that do not comply with the USA Patriot Act; and organizations whose policies, bylaws or practices are inconsistent with the Company's values or Code of Business Conduct, such as organizations that discriminate based on age, gender, race, ethnicity, national origin, sexual orientation, gender identity, religion, mental and/or physical disabilities, military or veteran status, or any other status or condition protected under law or Company policy.

**Q17. Is my church eligible to receive my donation and matching gift?**

A17. By exception, religious organizations may be eligible if funds are designated for certain secular activities provided they are:

- i. Are open to all individuals in the community regardless of religious belief;
- ii. Serve a secular purpose, such as a food pantry or a homeless shelter; and
- iii. Do not require participants to join in religious worship as a condition of receiving the services that the nonprofit offers.

**Q18. What are the requirements for recording offline donations made directly to a charity?**

A18. Employees must provide an official receipt from the organization and supporting documentation for the completed transaction.

The receipt must contain the following: Donor Name (MPC employee or employee and spouse, partner, or significant other, if donation is made from a joint account), Donation Amount, Donation Date, and Organization Name.

‡ **NOTE:** Effective February 19, 2024, the following additional documentation is required to show proof of the completed donation for Offline check, debit/credit card, and stock/securities transactions: Image showing both sides of an endorsed check; statement from financial institution (e.g. bank/credit card statement); stock transfer certificate; or donor advised fund (DAF) transaction.

In the case of a donation made from a stock transfer or DAF, an official receipt from the organization may not be required if the documentation from the stock transfer or DAF otherwise sets forth the specified details on the transaction statement showing the organization has received and/or deposited the donated funds. MPC reserves the right to request additional information if the stock transfer or DAF statement does not provide sufficient detail.

Screenshots of online statements or transactions should contain the following: Donor name, Name of financial institution, Type of account identifier, Donation amount, Donation date and Organization name. Ancillary or unrelated data can be redacted or blocked out for privacy purposes.

‡ **NOTE:** Effective February 19, 2024, offline donations in the form of cash are not eligible for a match.

**MATCHING GIFTS FOR HIGHER EDUCATION**

**Q19. What is the Matching Gifts for Higher Education Program?**

A19. Matching Gifts for Higher Education provides a Company match of up to \$10,000 for qualified gifts to two- and four-year accredited colleges and universities. This is separate and in addition to the Employee Open Giving Program match.

Donations can be initiated through the online Portal; payroll deductions, credit/debit card payment, and offline payment options are available.

### **Q20. Which organizations qualify for Matching Gifts for Higher Education?**

A20. Qualified donations to two- and four-year accredited colleges and universities are eligible for a Company match of up to \$10,000. This is separate and in addition to Employee Giving Program matching funds.

\*See the Employee Giving & Volunteer Program guidelines for a detailed explanation of eligible and ineligible institutions.

### **Q21. How do I submit a Matching Gifts for Higher Education request? What are my payment options?**

A21. To make your donation or record an offline donation, log in to the Portal and click on the “Give” tab from the top line navigation or on the Matching Gifts for Higher Education banner. Select the higher educational institution you wish to donate to by using the Portal search function.

You can elect to make your gift via payroll deduction, credit card, or record a donation made “offline” directly to the educational institution and request a Company match for eligible gifts.

\*Note: To ensure that your donation is matched, you must select the “Apply for Match” during the checkout process.

### **Q22. Are paper forms available?**

A22. All requests are to be completed by using the Employee Giving & Volunteer Portal. Donations and match requests will not be accepted via paper form.

### **Q23. What are the requirements for recording an “offline” donation made directly to a charity?**

A23. Employees must provide an official receipt from the organization.

The receipt must contain the following: Donor Name (MPC employee or employee and spouse, partner, or significant other, if donation is made from a joint account), Donation Amount, Donation Date, and Organization Name.

‡ **NOTE:** Effective February 19, 2024, the following additional documentation is required to show proof of the completed donation for Offline check, debit/credit card, and stock/securities transactions: Image showing both sides of an endorsed check; statement from financial institution (e.g. bank/credit card statement); stock transfer certificate; or donor advised fund (DAF) transaction.

In the case of a donation made from a stock transfer or DAF, an official receipt from the organization may not be required if the documentation from the stock transfer or DAF otherwise sets forth the specified details on the transaction statement showing the organization has received and/or deposited the donated funds. MPC reserves the right to request additional information if the stock transfer or DAF statement does not provide sufficient detail.

Screenshots of online statements or transactions should contain the following: Donor name, Name of financial institution, Type of account identifier, Donation amount, Donation date and Organization name. Ancillary or unrelated data can be redacted or blocked out for privacy purposes.

‡ **NOTE:** Effective February 19, 2024, offline donations in the form of cash are not eligible for a match.

## **VOLUNTEER INCENTIVE PROGRAM (VIP)**

### **Q24. What is the Volunteer Incentive Program?**

A24. The Volunteer Incentive Program (VIP) grants eligible individual employees one \$500 reward to the charity of their choice for a minimum of 24 hours of qualified individual volunteer hours. When the minimum number of volunteer hours have been recorded, a virtual \$500 CauseCard will be issued to the employee in the Portal and can be redeemed to the eligible charity of their choice.

Eligible employees can also earn one additional \$500 grant on behalf of a qualified group volunteer event that has met a minimum of 24 collective hours.

**Q25. What types of organizations can I select to receive my VIP Grant?**

A25. VIP grants may be redeemed by any organization that is eligible for the Employee Open Giving or Matching Gifts for Higher Education Program, as described above and in the Employee Giving & Volunteer Program guidelines.

**Q26. How can I meet the 24-hour volunteer requirement?**

A26. An employee can perform 24 hours of volunteer service independently; additionally, hours may be pooled from multiple events for an individual CauseCard.

Eligible employees can also apply for a \$500 grant on behalf of a qualified group volunteer event they participated in with immediate family members residing in the employee's household (including a spouse, partner, or significant other and/or children or step-children) or other co-workers. For the combined award, a minimum of 24 collective volunteer hours is required. Once achieved, the group award will be paid as a grant to the charity where the group volunteer event took place.

\*Note: Once the hours are recorded and the 24-hour minimum is met, you will then see in the Portal under the "My Volunteering" tab that you can apply for a team grant by hitting the "Apply Now" button.

**Q27. Do my volunteer hours need to be completed with one organization? Can I pool my volunteer hours to qualify for a VIP award?**

A27. Qualifying individual hours can be pooled to meet the minimum threshold of 24 volunteer hours required to earn an individual VIP award. You can record your volunteer time in increments in the Portal, and after Community Relations' monthly review of employees who have reached the 24-hour minimum, you should receive notification that your service was eligible and that your CauseCard is ready for redemption.

**Q28. What is a team event?**

A28. Volunteer hours on behalf of a qualified group volunteer event that an employee participated in are eligible if the minimum of 24 collective volunteer hours is satisfied. The criteria for eligible group participants includes immediate family members residing in the employee's household (including a spouse, partner, or significant other and/or children or step-children) and co-workers. An employee who has created the team event in the portal and has met the requirements with the combined team hours is eligible to apply for a \$500 team grant.

**Q29. Will MPC verify that the hours I submitted are correct?**

A29. The volunteer hours recorded in the Portal are subject to audit. If a discrepancy is found, the employee will be asked to resubmit the hours. If a donation is at any time found to have been generated by falsely reported volunteer hours, Community Relations will pursue return of the funds and employees may be subject to disciplinary action, per the terms of the agreement in the Portal.

## MISC. FAQ

### **Q30. What format and information is needed for receipts?**

A30. Must be in pdf or jpeg format in order to submit.

Receipts must include the following: Donor name (MPC employee or employee and spouse name, if donation is made from a joint account), Donation amount, Donation date and Organization name.

Multiple dates of donation are acceptable as long as the receipt includes a breakdown. Only one attachment can be uploaded to the portal – multiple pages need to be uploaded as one attachment.

‡ **NOTE:** Effective February 19, 2024, the following additional documentation is required to show proof of the completed donation for Offline check, debit/credit card, and stock/securities transactions: Image showing both sides of an endorsed check; statement from financial institution (e.g. bank/credit card statement); stock transfer certificate; or donor advised fund (DAF) transaction.

In the case of a donation made from a stock transfer or DAF, an official receipt from the organization may not be required if the documentation from the stock transfer or DAF otherwise sets forth the specified details on the transaction statement showing the organization has received and/or deposited the donated funds. MPC reserves the right to request additional information if the stock transfer or DAF statement does not provide sufficient detail.

Screenshots of online statements or transactions should contain the following: Donor name, Name of financial institution, Type of account identifier, Donation amount, Donation date and Organization name. Ancillary or unrelated data can be redacted or blocked out for privacy purposes.

‡ **NOTE:** Effective February 19, 2024, offline donations in the form of cash are not acceptable

### **Q31. Do separate donations made to the same institution need to be submitted separately when requesting a matching gift?**

A31. Yes. Each donation must be entered separately in the Portal.

### **Q32. How often are requests for a matching gift processed?**

A32. All “offline” donations (i.e., checks, debit/credit cards, donor advised fund/stocks/bonds/securities) that qualify for a matching gift, as well as credit/debit card donations and payroll deductions made “online” via the Employee Giving and Volunteer Portal, will be processed monthly, though certain donations requiring verifications of documentation may require additional processing time.

Donations made via payroll deduction, whether one-time or recurring, will be withheld accordingly (i.e., one-time or every pay period) and qualified matching funds, will be processed one month in arrears and disbursed monthly.

### **Q33. Can my donation receipt for a fundraiser be turned in for the Company match?**

A33. Donations to a fundraiser or auction item can be matched as long as the receipt listed shows the fair market value of the item paid for and the match requested is only for the actual donation amount (amount paid minus fair market value of item). The following also need to be listed on the receipt: Donor Name (MPC employee or employee and spouse name, if donation is made from a joint account), Donation Amount, Donation Date, and Organization Name.

### **Q34. Can I host a fundraiser or event and turn in the proceeds for a Company match?**

A34. Donations put through the Portal should be the individual employee’s personal donations, not funds that have been raised through different events or activities or pooled from other employees or non-employees. Further details are outlined in the fundraiser guidance for Company sponsored events.

**Q35. Can I donate to my school and apply for the company match?**

A35. Matches are available for schools recognized by the Internal Revenue Service as a designated tax-exempt public charity under Section 501(c)(3) of the Internal Revenue Code (the “Code”) or as an instrumentality of a federal, state, or local government as provided by Code Section 170(c)(1).

**Q36. If I volunteer at a school, can I log my volunteer hours as part of the VIP program?**

A36. If you volunteer at an eligible school that is recognized by the Internal Revenue Service as a designated tax-exempt public charity under Section 501(c)(3) of the Internal Revenue Code (the “Code”) or as an instrumentality of a federal, state, or local government as provided by Code Section 170(c)(1), you can log volunteer hours, log donations and redeem a CauseCard.

**Q37. Why can't I find my non-profit organization in the Portal?**

A37. The organization may not be updated in the IRS database, or the organization may be ineligible for giving.

In order to add a new organization to the Portal, the organization has to have their own EIN or Tax ID#. If the program has its own EIN, the IRS database may not be updated. The organization can work with YourCause to become vetted. Employees can start the process through the Portal by selecting the “Suggest an Organization” tab.

\*Note: It can take several weeks to a few months to vet an organization depending on the scenario. Please contact YourCause for more information.

**Q38. What is a CauseCard?**

A38. A CauseCard is a virtual reward that is offered to eligible employees for meeting the requirements of a Giving program. The CauseCard is redeemable through the Portal.

**Q39. How often are CauseCards disbursed?**

A39. CauseCard donations will be distributed within 30-45 days after the close of the month in which the CauseCard was redeemed. The distribution is on the same monthly schedule as the Marathon Petroleum Employee Giving & Volunteer Program payout distribution. CauseCards will expire 60 days after the issuance date.

**Any Questions –**

Contact Karyn Kamphaus - [kmkamphaus@marathonpetroleum.com](mailto:kmkamphaus@marathonpetroleum.com)