

## Applying for a Chevron Matching Grant up to a \$3000 Annual Total Per Retiree

For all applicants, help is just a toll-free phone call away at (866) 751-6031 8am to 4:00pm Pacific time

### **Before you start:**

Get the EIN (ie. Tax ID number) from each organization to which you want to make a matching grant by calling them. List their phone numbers for reference. If you want the grant to come through this year, apply by October.

**Log in for all** (Page 1)

**New members or new organization** (Page 2)

**Grants for volunteer hours** (Pages 3-4) - You will not need a receipt or record from the charity for your volunteer hours. Just submit the charity contact person and number. You must have at least 20 volunteer hours.

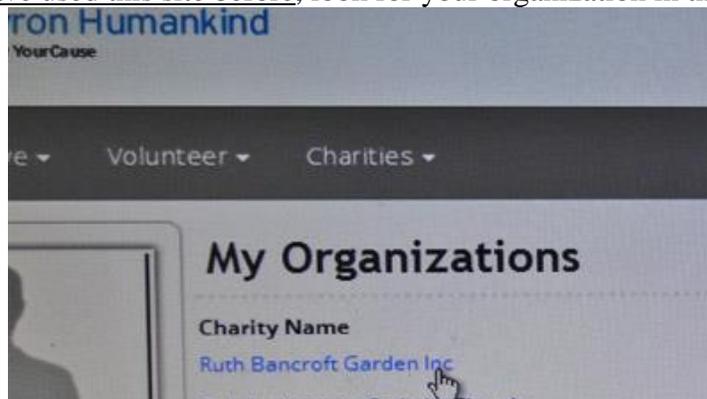
**Matching grants for donations** (Pages 5-6) - Make sure you have and can attach a digital version of a certifying document from the charitable organization (501c.3 or as defined by Chevron) that lists your dollar value donation, ie. as a Word file or a scanned file of a canceled check in jpg picture or Adobe pdf format.

D) **TO LOG IN** Go to the Chevron Matching Grant Site - [chevron.yourcause.com](http://chevron.yourcause.com) – see screen below.

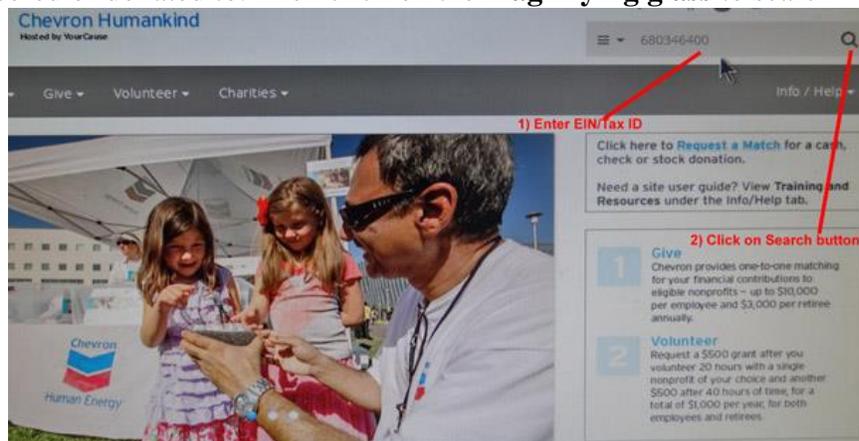
- If you are new to the site, click on the top right link to Register now.
- If you have used the site before fill in the two blocks at the left - **in the User ID block enter your email**, then enter your password in the next block to log in.

If you are new to this site, go to the next page.

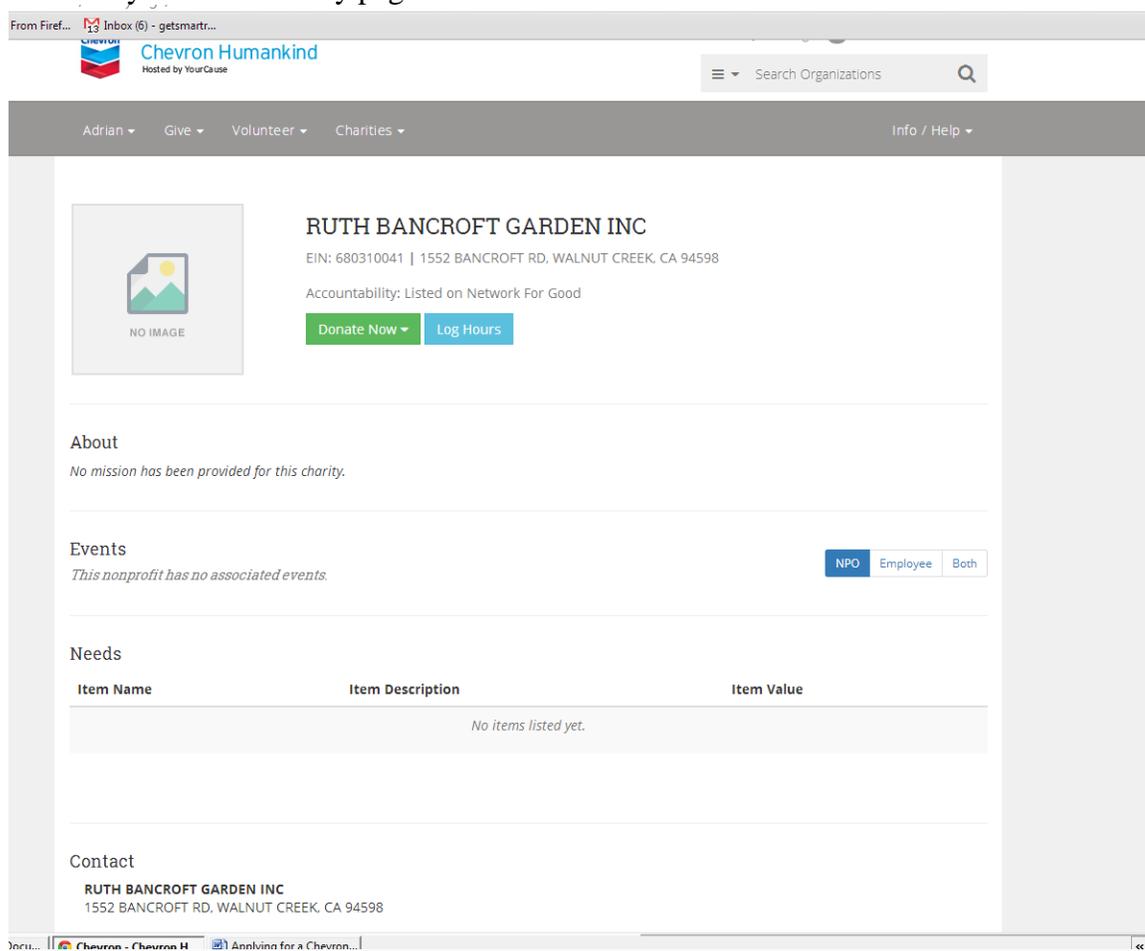
If you have used this site before, look for your organization in the Grey menu bar – [Charities](#), [My organizations](#)



If it is a new organization, at the **top right search bar**, enter the **EIN/Tax ID Number** of the organization you volunteered or donated to. Then click on the **magnifying glass** to search



When you locate your organization; Click on the blue **View Page button** to the right of the charity name. This will take you to the charity page.



From here on,

**Request matching donations** (pages 3-4) using the Green button OR  
**Grants for volunteer hours** up to 40 hours (pages 5-6) using the Blue button

## How to Submit a Volunteer Grant (\$500 for 20 hours, max \$1000 for 40 hours)

Click on the Blue tab **LOG HOURS**, from the previous screen. (You **must** log hours on the site for every grant)  
 My HOURS: Tip - Even if you exceeded 20 hours, please log 20 hours each time you apply. If you have done more than 40 hours, apply twice, logging 20 hours each. You are allowed up to two 20 hour grants per year.

EVENT NAME: Input a **brief** description of the volunteering you completed and if it is **weekly every Tuesday, or monthly** so state. **Don't check the Repeat box, it is too complicated.**

DATE: Click **calendar** button and select appropriate single date for when you completed these hours.

EVENT TYPE: For retirees, **General volunteering** is a safe catch-all in the drop down box

EVENT CATEGORY: Select the most appropriate from the drop down box

Click Done – The orange button.

**Log New Hours**

**Event Summary**

Manage Participants

Add Details

**\*My Hours** 20 **Use 20 hr increments**

**\*Event Name** Plan propagation every Thursday ending first quarter of 2015

**\*Participation Date** 30 Mar 2015 **End date for this activity**

Event Repeats

**\*Event Type** General Volunteering **Select general V.**

**\*Event Category** Gardening/Planting **Choose from dropdown menu**

Virtual Event?

**\*Country** United States

**\*State/Region/Province** California

**\*City/Suburb** Walnut Creek

**\*Organization** Ruth Bancroft Garden Inc [Change](#)

Nice job! You're almost done.

[Log Hours for Others](#) [Add More Details](#) **Done**

If it is eligible for a match, you will receive a pop up with the grant request like the one pictured below. Please complete the information on this form:

1. Please provide a short description of your volunteer activity with this organization;
2. Organization contact person;
3. Organization email address;
4. Is this organization religious? **If Yes, on the next screen, please add a non-religious program designation for this request to be considered.** (Examples of this would be a food pantry or clothes closet; a program that is open for the community as a whole despite religious affiliation.)

Agree to the terms:

Scroll down and **Click the blue Next** button.

**2015 Volunteer Grant Program**

### Apply for a company match

Note: By completing this form your event will be locked until a decision is made on your request.

Please provide a short description of your volunteer activity with this organization (OPTIONAL):

\* Organization contact person:

\* Organization email address:

\* Is this organization religious?  
If Yes, on the next screen, please add a non-religious program designation for this request to be considered.

Yes  
 No

\* I hereby certify that:

- Neither my family nor I will derive any direct or indirect financial benefit from this contribution.

The **second** pop up will allow you to add the designation for the funds. Here you will also need to **make sure to select the box to the right of the hours** you are counting for this grant (must be at least 20 hours checked). When you have selected enough hours, the SUBMIT button will turn from gray to blue and you will then be able to select it. You will then receive a confirmation that your grant has been saved. **Click ok** and on the next screen will be the record of the request.

**2015 Volunteer Grant Program**

### Apply for a company match

Note: By completing this form your event will be locked until a decision is made on your request.

Match Organization: World Vision

Designation: None

Total Hour Needed(Threshold) 20.00

Match Amount 500.00 USD

Selected Hours 0.00

Calculated Match Amount 0 USD

Eligible Match Amount 0 USD

Name:	Hours	Participant Count	Select
asdfaa	20.00	1	<input type="checkbox"/>

Submit Cancel

Match Summary (active match program ending 12/31/2015)

Total Match Cap	\$3,000.00
Already allocated	\$210.00
Program cap	\$1,000.00
Already allocated to program:	\$0.00
<b>Match Remaining</b>	<b>\$1,000.00</b>

You will also receive an email confirming that YourCause received the request.

You can then log out by going to your **name tab** in the top right corner and click **SIGN OUT**

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## How to Submit a Donation Matching Grant Request

(You must have an **attachable** organization receipt – a Word or Excel document or scanned email). Now, Log in as shown on the first page, Click on **Give, Request a Matching Grant** on Grey menu bar,

The screenshot shows the Chevron Humankind website interface. At the top left is the Chevron Humankind logo with the tagline "Hosted by YourCause". A navigation bar contains "Adrian", "Give", "Volunteer", and "Charities". A dropdown menu is open under "Give", listing "My Giving", "Credit Card Donation", "Request a Matching Grant", "My Grants", and "Donation History". A red arrow points to the "Give" menu item, and another red arrow points to the "Request a Matching Grant" option in the dropdown. Below the navigation bar is a large photo of two children holding a robot. To the right, there are informational boxes: one for "Request a Match" for check or stock donations, and another with steps "1 Give" and "2 Volunteer".

On the next screen :

The screenshot shows the "Request a Matching Grant" form. At the top, a red note states: "NOTE: Matching grant processing takes approximately 8-10 weeks. Receipts are now required for offline match requests. Please view the grant request guide for samples of acceptable receipts." The form fields are:
 

- Donation Amount:** 1000 USD (with a "Currency Converter" link).
- Donation Date:** 31 Jul 2015 (with a calendar icon).
- Organization:** St. John Vianney Catholic Church (with a "Change" link).
- Designate to a specific project or cause (Optional):** A dropdown menu is set to "Other". A red arrow points to this menu with the text "Use other from this drop-down menu". Below the dropdown is a text field for "Donation for non-sectarian program" with a "Maximum Characters Allowed: 100" limit. A red arrow points to this field with the text "Name community program used by your religious group for donation match to above group".
- Receipt:** A "Choose File" button is next to the filename "scan\_20150...113858.pdf". Below it, supported file types are listed: ".jpg, .jpeg, .png, .xls, .xlsx, .pdf, .doc, .docx, .ppt, .pptx, or .msg".

 A blue "Save" button is at the bottom of the form. On the left side, a user profile is visible with the name "SOUZA" and location "EKEK, CA, United".

You can then log out by going to your **name tab** in the top right corner and click **SIGN OUT**

**DONATION AMOUNT:** Enter your donation amount

**DONATION DATE:** Click **calendar** button and select date listed on your donations receipt from the charity.

**ORGANIZATION:** Click Select an organization tab, Select Charity from Your Favorites that pops up.

Note: **If the donation has been made to a church or religious organization**, you must state the designation for matching funds should go to a program with a non-sectarian purpose or the community as a whole. In this case **Use Other in Optional Tab**, another box opens below where you state/type in “Matching funds need to go to a non-sectarian community program such as Food Pantry, Homeless Food, Homeless Shelter, Relief Services”

Click on **Choose File** which takes you to your computer folders from which you select the file for attachment.

Click on the supporting document file name. Now the File name will show up next to Choose File.

Click on **BLUE Save Tab**

In the next Pop Window **Click on Yes/No** Is this organization religious, **Click on I agree**

Click on **BLUE Next** tab

2015 Direct Donation Match

Apply for a company match

\* Is this organization religious?

If Yes, you must have a designation to a secular (non-religious) program for the donation to be eligible for a match. If you have not already done so, please click "Cancel" below to add a designation and re-apply for a match.

Yes  
 No

\* I hereby certify that:

- Neither my family nor I will derive any direct or indirect financial benefit from this contribution.
- My gift is a voluntary contribution, it fully complies with the provisions of the program as described and does not represent in any way a fee for a service or benefit.
- To the best of my knowledge this organization/program meets the Chevron Humankind eligibility requirements as described in the program guidelines.
- I authorize the recipient of my gift to communicate with Chevron and YourCause for the purpose of confirming my gift and that its purpose qualifies under the Chevron Humankind program guidelines.
- Any misrepresentation by me of the statements made on this form will forfeit my rights to any matching contributions and, in addition, may result in violations of law.
- I have not been nor will be reimbursed by anyone for this contribution.
- I have read and understood the Chevron Humankind program guidelines.

I agree

Next Cancel

Click on the **GREEN Submit** Tab in the next pop-up window to submit.

You will next see a screen of donations requested, for your information.

Scheduled [What is this?](#)

Match eligible donations found. Click to view.

In-Process [What is this?](#)

Date	Name	Type	Amount	Status	Match	Match Status
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You can then log out by going to your **name tab** in the top right corner and clicking **SIGN OUT**