



## **AYALA FOUNDATION USA DONOR GUIDE**

### **Background**

Many Filipino Americans continue to have strong ties to the Philippines and are looking for ways to assist their *kababayans* back home. While many have successfully donated to their hometown organizations, churches, or Alma Mater, others complain of being “burned” badly in their attempts to help. As a result, many individuals have become wary of giving to the Philippines.

Ayala Foundation USA (AF-USA) was established to break down the barriers to giving to the Philippines by providing Filipino Americans and other U.S. donors an effective and efficient mechanism to facilitate charitable donations. With a presence in both the U.S. and Philippines, AF-USA has the infrastructure to ensure that every dollar donated will go toward meeting charitable needs in the Philippines. AF USA was registered in 2000 with the Internal Revenue Service as a tax-exempt organization under Section 501(c)(3).

### **Why Ayala Foundation USA?**

Donating to Ayala Foundation USA offers many benefits, including the confidence that your donation will only be used for charitable purposes. Other benefits include:

#### **1) Access to reliable information on the Philippines**

Through its unique relationship with Ayala Foundation, Inc. in the Philippines, AF-USA has direct access to information on the Philippines and the wide network of non-government organizations, schools, hospitals, and charitable organizations across the country. This on-the-ground connection gives U.S. donors the unique vantage point of knowing the areas of greatest need, profiles of regions, and information on organizations based on donor interests.



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## 2) Assurance of legitimate and deserving charities

All AF-USA Philippine partners undergo an extensive grant eligibility process to ensure that they are legitimate and deserving charitable organizations. In addition to using our own application, we also rely upon other institutions such as the Philippine Council for NGO Certification to determine eligibility on our partner list.

Regular updates on our Philippine partners are available on the website. For more information on our due diligence and anti-terrorism policies, please refer to our website or contact the AF-USA office for more information.

## 3) Tax Deductibility

As a U.S. 501(c) 3 non-profit organization, all donations to AF-USA are tax-deductible to the extent allowed under U.S. law. AF-USA issues receipts and acknowledgement letters for all donations that can be used for tax purposes.

## AF-USA Donor Services

AF USA offers multiple ways to support your charitable interests in the Philippines.

### 1) “United Way” of the Philippines: Menu of Philippine Charities

Through AF-USA, US donors can make tax-deductible contributions to many Philippine schools, hospitals, and other non-profit organizations that are AF-USA approved partners. Our AF-USA staff can work with you to determine which of these groups meet your criteria based on your region or area of interest. The list of these groups, along with some of their essential features, is contained in our website at [www.af-usa.org](http://www.af-usa.org).

### 2) Donor Recommended Charity Giving

AF-USA provides U.S. donors the opportunity to give to Philippine charitable organizations that may not yet be on our partner list. AF-USA staff can work with you to seek eligibility for such organizations in order to make tax-deductible donations through AF-USA. Please refer to the form “How to Recommend a Philippine Partner.”

Ayala Foundation USA only takes 1% of every donation to cover administrative costs.

## How to Donate

Donations can be made through cash, check, securities, bank deposit, and telegraphic transfer. Credit card donations can be made at [www.myayala.com](http://www.myayala.com) or over the phone. Donations through sales on e-bay can be made by registering on [www.missionfish.org](http://www.missionfish.org). We also accept car donations. Please contact our office for details.

Please note that donations cannot be processed unless they are accompanied by an AF-USA donation form. You can either complete the donation form online or get a copy by contacting the AF-USA office or downloading it from the website.

## Donor Benefits

All donors receive the following benefits:

Thank you and acknowledgement letter  
Acknowledgement in AF-USA e-bulletin and newsletter  
Subscription to monthly e-bulletin and semi-annual newsletter  
Ayala Foundation USA Annual Report

Donors who have given over \$1,000 to a single organization receive a special end-of-project report.

Donors making an total annual contribution of over \$1,000 will receive a special gift at the end of the year.

## HOW TO RECOMMEND A PHILIPPINE PARTNER

Ayala Foundation USA (AF-USA) provides U.S. donors with the opportunity of making tax-deductible donations to a wide variety of Philippine charitable organizations. Donors interested in making donations to organizations not currently on our partner list, can do so by recommending the organization to AF-USA. Please follow the steps below if you are interested in recommending an organization:

1. Determine whether your organization is currently on our partner list, or in the process of becoming a partner, by either visiting the AF-USA website at [www.af-usa.org](http://www.af-usa.org) or contacting the AF-USA office.
2. If the organization is currently not a partner or in the process of becoming a partner, please mail or fax a completed Philippine partner recommendation form to the AF-USA office. You can also complete this form online.
3. AF-USA will contact the organization to determine their interest in becoming a partner. If they are interested, AF-USA will work with them to undergo the grant eligibility process to ensure it is a legitimate and deserving charity. (For more information on our due diligence policy, please see the AF-USA Guidelines for Partnership on our website.)
4. Once their grant application is complete, it is reviewed by the AF-USA Board for approval. The AF-USA Board of Trustees approves or disapproves eligibility during its quarterly meetings. Approval or disapproval depends largely on the legitimacy of the organization and project, the completeness of the documentary requirements, as well as the quality of the project proposal submitted.
5. If the organization is approved as an AF-USA partner, the U.S. donor will immediately be contacted. U.S. donors can now make tax-deductible donations to AF-USA and recommend that their donation be directed to this Philippine organization.

Please note that donations cannot be processed unless they are accompanied by an AF-USA donation form. You can either complete the donation form online or get a copy by contacting the AF-USA office or downloading it from the website.

Please also note that Ayala Foundation USA is required by U.S. law to maintain control over all gifts and grants. While donors are permitted to make recommendations as to where their donations should be directed, restrictions are not allowed. The Board approves each grantee, and may at any time disregard a donor's recommendation, or remove a grantee from its eligibility list.

## PHILIPPINE PARTNER RECOMMENDATION FORM

### DONOR INFORMATION

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Name of Individual or Organization \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_ Fax \_\_\_\_\_

Email \_\_\_\_\_

### ORGANIZATION INFORMATION

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I recommend that the following organization become a partner of Ayala Foundation USA:

Organization Name \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_ Fax \_\_\_\_\_

Email \_\_\_\_\_

Contact Name & Title \_\_\_\_\_

### DONATION PLEDGE

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I/we are planning to make a (pls. circle one) one-time/multiple donation of approximately \$ \_\_\_\_\_ over a period of \_\_\_\_\_ (months/years).

Please note that this is a non-binding agreement and will only be used for informational purposes by AF-USA.

### DISCLOSURE OPTIONS

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Unless otherwise informed, AF- USA will share your contact information, recommendation of partnership, and pledge to the Philippine organization.

Check here if you would prefer that your recommendation  and/or pledge be anonymous.

### WAIVER

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If this organization is not approved, Ayala Foundation USA will have the control in granting my donation to one of its accredited partners.

Signature \_\_\_\_\_ Date \_\_\_\_\_

Please send completed form to Ayala Foundation USA, 255 Shoreline Drive, Suite 128, Redwood City, CA 94065 or fax to 650.508.8988