

Strategies for Supporting Advancement and Development

Matching Gifts Symposium

2007 Matching Gifts Best Practices Survey

Survey Results



www.SupportingAdvancement.com
services@supportingadvancement.com

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Matching Gifts Best Practices Survey Results

Following, are the results of the 2007 Matching Gifts best practices survey.

Wherever possible, the results have been compared to last year's survey in this document. For additional details on this year's and last year's survey, please visit the following page:

<http://www.supportingadvancement.com/potpourri/surveys/surveys.htm>

Survey Questions and Answers

1. Does your institution accept and process corporate/corporate foundation matching gifts?

	2007	2006
Yes	95.9%	98.7%
No	.0%	.6%
No answer/uncertain	4.1%	.6%

Your Matching Gifts Program

1. Do you have a defined "matching gifts program" in which you actively solicit your donors to request matching gifts?

	2007	2006
Yes	66.1%	72.0%
No	20.2%	12.7%
Planning Within 1 Year	5.5%	11.5%
Planning 1-2 Years from Now	2.2%	0.6%
Planning More than 2 Years from Now	1.6%	0.6%
No answer/uncertain	4.4%	2.6%

Your Matching Gifts Program (Continued)

2. Which of your advancement divisions is responsible for enhancing and improving the matching gift revenue stream?

	2007	2006
Advancement Services	49.7%	44.6%
Annual Giving	68.9%	67.5%
Corporate Foundation Relations	13.1%	10.2%
Membership	3.8%	1.9%
Other	12.6%	9.6%

Other answers included:

Accounting Development
Donor Relations
All areas
If gift is capital, capital team focuses on matching funds
Spartan Foundation/Athletics
Gift Accounting
gift administration
Public Relations
Development Services - Gift Processing
small museum, board based committee
Marketing and Constituent Development
Development
Online Giving
Development Information Technology department
only one department
Athletics
Small Shop

None
Major gifts
Annual Giving provides budget and marketing, but MG Coordinator (me) is in Records which is under IT Information Services. I enhance/improve the system by finding and maintaining demographics as well as corporate information besides processing the gifts and the forms.
Gifts processing
Foundation

Your Matching Gifts Program (Continued)

3. Which of your advancement divisions gets fiscal credit for matching gifts? (This is sometimes different from which division(s) may be responsible for soliciting or processing the gifts.)

	2007	2006
Advancement Services	18.0%	22.3%
Annual Giving	65.0%	64.3%
Corporate Foundation Relations	16.4%	15.9%
Membership	4.9%	3.2%
Other	27.3%	17.2%

Other answers included:

- Whichever department solicits the original gift gets credit for the matching gift.
- College development offices + Student Aid Association (for student athletes)
- We do not give 'credit' to divisions for matching gifts. The 'credit' is applied against the appropriate gifts, and that is applied to the goals of whatever division is responsible for the gift whether it is annual giving or capital or endowment.
- The corporate end gets the official credit with the gift; a soft credit goes to the donor thus how the donor gift was realized is which group gets the credit (annual giving, major giving, capital campaign, etc.)
- The college foundation where the original gift went.
- We are a small university and do not really follow who gets 'credit' for a gift. Because the matching gift follows the individual donor's designation, or is put in the unrestricted fund (depending on the companies policy), I guess the the 'credit' goes to Annual Giving.
- We do not keep track of credit by division.
- Depending on designation on gift.
- The division that owns the account the matching gift is deposited in
- Major gifts
- The one where the original gift went
- Gift is credited to whichever fund the gift came in for.
- None
- Whoever got solicitation credit for the original gift gets solicitation credit for the match.
- None of the above - they are a separate category not specifically attributed to any department
- Small shop no divisions
- We do not assign credit
- The Match is credited to the same account as the original gift was.
- Annual Giving and Individual Giving. The matching gift follows the original gift.
- only one department
- Major Gifts, Leadership Gifts
- Any division in the university or hospital that has a 501C program.
- Events

Your Matching Gifts Program (Continued)

Development

Capital giving.

small museum, board based committee

Events & Misc. Development

The matching funds are applied towards the designation of the donor's gift.

The match goes to the same fund as the donor's original gift except for general membership - those MG go to Annual Fund.

Follows the division of the employee's initial gift.

Generally the division that receives the benefit gets the credit. This is based upon where the employee's gift went.

The matching gift follows the solicitation, so whatever area received credit for the solicitation receives credit for the match; most often it is our annual giving team, but once in a while a major gift officer will be on a visit and ask for a higher end annual gift

No one area receives 'credit.' We all take credit basically and report the total amount raised via matching gifts.

Where the initial gift was given.

The matching funds go to support the same project the initial donor donation supported. This is often the annual fund.

the unit whose gift was matched

Foundation

Gift Accounting

Major/capital gifts

The credit goes to the same area the actual gift goes to.

As designated

If gift is credited to other than Annual Fund

No one gets credit for the process.

Development

4. How many total equivalent FTE positions do you have dedicated to your matching gift efforts?

	2007	2006
Average # of Positions	.45	.72

Your Matching Gift Revenues

Note that different ranges were used for 2006 so that ranges are not directly comparable for the revenue questions.

1. How much matching gift income did you record last year (estimate)?

	2007
\$50 Million or more	.0%
\$10,000,000 - \$49,999,000	.7%
\$2,500,000 - \$9,999,000	1.4%
\$1,000,000 - \$2,499,000	8.1%
\$250,000 - \$999,999	12.8%
\$50,000 - \$249,999	32.4%
\$20,000 - \$49,999	19.6%
\$19,999 or less	20.3%
N/A	4.7%

2. How much potential matching gift income did you write off last year (estimate)?

	2007
\$1,000,000 or more	0%
\$250,000 - \$999,999	2.0%
\$50,000 - \$249,999	6.7%
\$20,000 - \$49,999	23.5%
\$19,999 or less	24.8%
N/A	43.0%

Your Matching Gift Revenues (Continued)

3. What was your total gift revenue for last year (estimate)?

	2007
\$50 Million or more	14.1%
\$10,000,000 - \$49,999,000	28.2%
\$2,500,000 - \$9,999,000	26.2%
\$1,000,000 - \$2,499,000	11.4%
\$250,000 - \$999,999	8.7%
\$50,000 - \$249,999	4.0%
\$49,999 or less	.7%
N/A	6.7%

4. What % of your gift revenue came from matching gifts (estimate)?

	2007
N/A	6.8%
Less than 10%	89.2%
10-20%	4.1%
21-25%	0%
26-30%	0%
30-39%	0%
40% or More	0%

Your Matching Gifts Program (Continued)

5. What has been the trend in your overall matching gift revenues over the last 3 years?

	2007
Increase 100% or More	0%
Increase 50-99%	0.7%
Increase 26-50%	3.4%
Increase 0-25%	43.9%
No Change	22.3%
Decrease 0-25%	8.8%
Decrease 26-50%	2.0%
Decrease 50-99%%	1.4%
Decrease 100% or More	0%
Uncertain	17.6%

Our Partners and Vendors

1. Have you purchased matching gifts services from a vendor?

	2007	2006
Yes	55.8%	65.0%
No	35.5%	29.9%
Planning Within 1 Year	6.5%	1.9%
Planning 1-2 Years from Now	.7%	1.3%
Planning More than 2 Years from Now	.7%	0.6%
No answer/uncertain	.7%	1.3%

Our Partners and Vendors (Continued)

2. Which vendors have you used for matching gift products or services?

	2007	2006
Blackbaud Matchfinder	5.7%	5.7%
CASE MG Clearinghouse	52.3%	45.9%
HEP Giftplus	63.6%	40.1%

Note: in 2006 2.6% chose other. This was not an option in the 2007 survey.

3. What vendor matching gift products or services have you used?

	2007	2006
Inserts	35.0%	39.5%
Online Search	68.0%	55.4%
Hard Copy Directory	37.0%	35.7%
Post-its	13.0%	5.7%
Employment Data Screening	13.0%	6.4%
Other Products	12.0%	5.7%

Other answers included:

Alumni Donor email addresses to help secure matching gifts.
HEP via phonathon.
Online search company not listed.
Sage Software's CorrectGM.
Search engines.

Vendor Product Performance

4. Inserts – standard or customized to your organization.

	2007
Increase 100% or More	0%
Increase 50-99%	0%
Increase 26-50%	1.4%
Increase 10-25%	9.9%
Increase Less than 10%	14.1%
No Change	18.3%
Decrease Less than 10%	0%
Decrease 10-25%	2.8%
Decrease 26-50%	0%
Decrease 50-99%%	0%
Decrease 100% or More	0%
Uncertain	53.5%

Vendor Product Performance (Continued)

5. Online search linked through your organization's web site.

	2007
Increase 100% or More	0%
Increase 50-99%	1.2%
Increase 26-50%	2.4%
Increase 10-25%	8.4%
Increase Less than 10%	20.5%
No Change	14.5%
Decrease Less than 10%	0%
Decrease 10-25%	1.2%
Decrease 26-50%	1.2%
Decrease 50-99%%	0%
Decrease 100% or More	1.2%
Uncertain	49.4%

Vendor Product Performance (Continued)

6. Hard copy directory.

	2007
Increase 100% or More	0%
Increase 50-99%	0%
Increase 26-50%	0%
Increase 10-25%	3.1%
Increase Less than 10%	13.8%
No Change	30.8%
Decrease Less than 10%	0%
Decrease 10-25%	0%
Decrease 26-50%	1.5%
Decrease 50-99%%	0%
Decrease 100% or More	0%
Uncertain	50.8%

Vendor Product Performance (Continued)

7. Post-its.

	2007
Increase 100% or More	0%
Increase 50-99%	2.4%
Increase 26-50%	0%
Increase 10-25%	0%
Increase Less than 10%	4.8%
No Change	31.0%
Decrease Less than 10%	0%
Decrease 10-25%	0%
Decrease 26-50%	0%
Decrease 50-99%%	0%
Decrease 100% or More	0%
Uncertain	61.9%

Vendor Product Performance (Continued)

8. Employment Data Screening.

	2007
Increase 100% or More	0%
Increase 50-99%	0%
Increase 26-50%	4.5%
Increase 10-25%	2.3%
Increase Less than 10%	9.1%
No Change	29.5%
Decrease Less than 10%	0%
Decrease 10-25%	0%
Decrease 26-50%	0%
Decrease 50-99%%	0%
Decrease 100% or More	0%
Uncertain	54.5%

9. Do you use any other products and if so, what was your experienced with them?

EW include reminders on all of our direct mail solicitations about matching gift opportunities
Postcards developed in house. They have helped to increase awareness but can't put a dollar figure on the results.
HEP's E-Find product with good results
BB Matchfinder - some listings are out of date even w/updates. Unable to run a list of regional matching employers - database is set up to produce the address where gifts are processed instead of where people are employed.
Created our own insert - saw an increase in gifts
We send a letter to people who we think could have matching potentials

Vendor Product Performance (Continued)

10. Do you use one of the matching gift databases to automatically populate corporate matching program parameters when gifts and pledges are entered into the system?

	2007	2006
Yes	22.5%	17.8%
No	69.8%	65.6%
No answer/uncertain	7.8%	16.6%

11. What are other products and services that could be provided by vendors that you feel could improve your matching gifts efforts?

Cleaner accurate employment information
Copies of Matching Gift application forms and program guidelines/requirements
Make website searches easier and encourage m.g. corporations to include their names on lists.
If there is a personalized email that could be sent to alumni once they have been identified as working for a company that offers matching gifts that would be wonderful.
Email alerts when programs stop/start/change. Control over names under which gifts can be registered under a tax id.
I wish there was a list of matching companies available at no charge for non-education organizations to use. Many of us are small nonprofits and do not have the funds to use matching gift vendors or services, and CASE's lists are for educational matches.
When new employment info is added to record, automatically populate matching gift possibility. Have a clearing house to help eliminate the inconsistencies with paperwork needed for employers. Develop automatic, periodic reports of MG possibilities for follow-up.
Upload of matching gift company information and restrictions into development database.

Vendor Product Performance (Continued)

12. If you do not use, or have discontinued the use of vendor supplied matching gift products or services, what is the reason?

	2007	2006
Too expensive	39.7%	12.7%
Ineffective	10.3%	4.5%
No real return on investment	19.0%	8.3%
Donors asked not to receive inserts or other materials	0%	.6%
Can do in house more effectively	22.4%	10.8%
Unsure of potential benefits	29.3%	12.7%
Other reasons	22.4%	5.7%

Other reasons included:

There has been no in-house organization of efforts to increase matching gift revenue. I don't agree, but that's the way it is nonetheless.
Had a lot of problems with the Blackbaud Matchfinder and had to stop.
Not a priority in organization
This is a system fundraising operation and giving is limited to trustees and foundation board members. Only about 4 gifts per year are match eligible.
We are planning not yet implemented
Do not know employers for bulk of our constituents.
Has not been a priority
Have only been in position for three years and no system giving program existed prior to that. Had to build from square one and a matching gift program was not high priority. Looking to begin at this institution more proactively in the next fiscal year.

The Matching Gift Fundraising Cycle

1. What methods do you use for informing donors about the potential for matching gifts?

	2007	2006
Site defined text inserted into solicitation piece	68.6%	62.6%
Site defined text inserted into receipt	37.2%	38.9%
Leaflet listing matching gift programs inserted into solicitation piece	25.6%	33.8%
Leaflet listing matching gift programs inserted into receipt	14.0%	14.7%
Direct interaction with donors during phonathons	66.1%	59.9%
Information posted on your institution's web site	66.1%	74.5%
Focus groups or other networking/communication strategies with constituents in companies that have matching gift programs	4.1%	5.1%
Other (please specify)	21.5%	17.2%

Other answers included:

Letters sent to donors who work for matching employers reminding them to initiate their match. Reminder letters.
We include it in our monthly email donor newsletter and with a volunteer newsletter for individuals that help us fundraise.
Internally printed post-it notes on receipt when a gift has been received from someone working for a MG company.
Phonathon
We also send a letter when the donor has indicated there will be a match, yet we've received no form. The letter gives the donor specific information on the employer's matching policies, including who to contact to obtain the form.
Letter to donors (gift in last year) and volunteers directing them to our website and also offering to look up their employers eligibility if they send us that information via a tear off on the letter.
Matching Gift Acknowledgement Letters to donors when gift is matched

The Matching Gift Fundraising Cycle (Continued)

2. How effective have these methods been?

	No effect	Some effect	Great effect	Uncertain	N/A
Site defined text inserted into solicitation piece	3% (3)	47% (49)	8% (8)	27% (28)	15% (16)
Site defined text inserted into receipt	0% (0)	28% (26)	4% (4)	17% (16)	50% (46)
Leaflet listing matching gift programs inserted into solicitation piece	1% (1)	20% (17)	2% (2)	19% (16)	58% (50)
Leaflet listing matching gift programs inserted into receipt	0% (0)	14% (11)	3% (2)	12% (9)	72% (56)
Direct interaction with donors during phonathons	1% (1)	39% (38)	22% (22)	15% (15)	22% (22)
Information posted on your institution's web site	5% (5)	41% (41)	6% (6)	29% (29)	19% (19)
Focus groups or other networking/communication strategies with constituents in companies that have matching gift programs	0% (0)	7% (5)	3% (2)	5% (4)	85% (62)
Other	0% (0)	14% (9)	12% (8)	5% (3)	69% (44)

3. For what percentage of active (living) individual constituents on your database do you have a valid employment record (estimate)?

	2007	2006
Greater than 75%	1.7%	12.7%
50 - 75%	21.2%	6.4%
25 - 49%	33.1%	26.8%
10 - 24%	18.6%	28.0%
0 - 10%	17.8%	16.6%
N/A	7.6%	9.6%

4. What strategies have been effective for acquiring employment information?

	2007	2006
Alumni directory survey	73.0%	59.2%
Collection of business cards at events	49.5%	44.0%
Individual surveys (follow up to address changes, etc.)	41.4%	49.7%
Professional and other specialized directories	13.5%	12.7%
Phonathon staff asking for employment information	73.9%	61.8%
Buck slips and information update cards in all publications	19.8%	22.3%
Advertisements in publications to collect information	13.5%	12.7%
Information update form or other data harvesting mechanisms on your web site	47.7%	40.8%
Working with your career center	9.0%	8.9%
Career networking within your online alumni community	17.1%	16.6%
Internet searches	33.3%	30.6%
Running your database through screening services	29.7%	23.6%
Others	14.4%	8.9%

Other answers included:

We are just formulating plans for matching gifts appeal.
Sending a tracer to donors with their receipt requesting that they provide additional information or correct the information we currently have on their record. Many will update or provide their employment information.
We include short "Tell us More" forms with most of our donor envelopes, and also include the online form link in recognition letters.
Collected passively
Undergraduate Parent/family registration forms
Yearly registration forms
Alumni E-Community(with email forwarding service), Online alumni directory
Our data universe is so small we have bios on just about all of our donors.

The Matching Gift Fundraising Cycle (Continued)

5. How effective have these strategies been?

	No effect	Some effect	Great effect	Uncertain	N/A
Alumni directory survey	2% (2)	30% (29)	38% (37)	9% (9)	21% (20)
Collection of business cards at events	3% (3)	42% (38)	16% (14)	7% (6)	32% (29)
Individual surveys (follow up to address changes, etc.)	0% (0)	33% (27)	20% (17)	5% (4)	42% (35)
Professional and other specialized directories	1% (1)	15% (11)	6% (4)	11% (8)	67% (48)
Phonathon staff asking for employment information	0% (0)	43% (40)	33% (31)	9% (8)	15% (14)
Buck slips and information update cards in all publications	3% (2)	25% (18)	3% (2)	6% (4)	64% (46)
Advertisements in publications to collect information	2% (1)	15% (10)	2% (1)	8% (5)	74% (49)
Information update form or other data harvesting mechanisms on your web site	0% (0)	40% (32)	18% (14)	9% (7)	34% (27)
Working with your career center	3% (2)	11% (8)	4% (3)	7% (5)	75% (54)
Career networking within your online alumni community	0% (0)	18% (13)	10% (7)	8% (6)	64% (47)
Internet searches	3% (2)	29% (23)	10% (8)	12% (9)	46% (36)
Running your database through screening services	0% (0)	22% (16)	15% (11)	11% (8)	53% (39)
Other	0% (0)	9% (6)	8% (5)	9% (6)	73% (47)

6. Have you ever approached your key constituent organizations and lobbied them to create matching gift programs?

	2007	2006
Yes	10.9%	10.2%
No	78.2%	14.0%
Planning Within 1 Year	2.5%	%
Planning 1-2 Years from Now	1.7%	%
Planning More than 2 Years from Now	0%	%
No answer/uncertain	6.7%	75.8%

7. Have you ever attempted to establish “corporate agents” in companies where you have clusters of alumni and/or other constituent employees?

	2007	2006
Yes	25.2%	30.6%
No	58.8%	58.0%
Planning Within 1 Year	4.2%	%
Planning 1-2 Years from Now	1.7%	%
Planning More than 2 Years from Now	.8%	%
No answer/uncertain	9.2%	11.5%

8. If you send reminders to corporations/foundations asking them to fulfill matching gift requests submitted by your organization, what is the schedule?

	2007
Monthly	1.3%
Quarterly	9.1%
Semi-Annually	10.4%
Annually – just before the close of the Fiscal Year	3.9%
Annually – just before the end of the calendar year	2.6%
Random – as required	59.7%
Other	13.0%

Other answers included:

Do not send any. (4 respondents.)
Based on when the match was applied for and the company payment schedule
We just sent our first batch of letters this week. Depending on the response, we'll set a schedule. At this point, we're looking at quarterly or semi-annually.
I contact companies individually if there are unmatched gifts requested. I usually do this in Dec. and June to catch employee forms that may be aging out of the match time.

The Matching Gift Fundraising Cycle (Continued)

9. If you send reminders to individuals asking them to follow up on submitting their matching gift forms, what is the schedule?

	2007
Monthly	12.4%
Quarterly	13.5%
Semi-Annually	1.1%
Annually – just before the close of the Fiscal Year	2.2%
Annually – just before the end of the calendar year	1.1%
Random – as required	44.9%
Other	24.7%

Other answers included:

Do not send any.
Case by case.
With pledge fulfillment correspondence.
60 days after the gift
We do not remind individuals to submit their matching gift forms.
Up to two appeal letters one month apart after the receipt of gift.
only when a pledge is made through the phonathon
"reminder" is sent with pledge notice or payment receipt.
weekly

The Matching Gift Fundraising Cycle (Continued)

10. Do you allow donor recognition in gift clubs/societies for the matching gifts they direct to your institution?

	2007	2006
Yes	71.7%	74.5%
No	18.3%	13.4%
Planning Within 1 Year	0%	0%
Planning 1-2 Years from Now	0%	0%
Planning More than 2 Years from Now	0%	0%
No answer/uncertain	10.0%	12.1%

Your Organization

2. Institution supported is:

	2007	2006
Private	54.8%	59.0%
Public	43.5%	34.0%
Uncertain	1.7%	7.0%

3. Type of organization:

	2007	2006
Elementary/Secondary Education	7.8%	9.0%
Post-secondary Education	69.6%	74.0%
Other Academic/Research	6.1%	3.0%
Hospital/Clinic	0%	0%
Other Healthcare	2.6%	3.0%
Aquarium/Zoo/Botanical Garden	1.7%	1.0%
Science/Technology Museum	.9%	0%
Art or History Museum	1.7%	1%
Other Museum	.9%	0%
Performing Arts Organization	0%	1%
Global/National/Local Community Service	1.7%	1%
Other	7.0%	7.0%

Your Organization (Continued)

Other answers included:

Library
Environmental Non-profit
Health and education
Higher Education
4yr college
Liberal Arts College
Humanitarian

Your Database and Fundraising Software

1. Number of constituent records in your database:

	2007	2006
Average	123,433	149,013
Maximum	750,000	3,000,000
Minimum	100	0
Standard Deviation	147,993	288,323
1st Quartile	25,750	26,006
2nd Quartile	67,500	69,500
3rd Quartile	143,250	188,443

2. Your fundraising/development/advancement software:

	2007	2006
Banner	17.4%	15.0%
Datatel	11.0%	8.0%
Millennium	13.8%	8.0%
Raiser's Edge	27.5%	25.0%
SunGard Advance	13.8%	19.0%
Other	16.5%	25.0%

Your Database and Fundraising Software (Continued)

2. Your fundraising/development/advancement software other answers:

Viking (2)
Custom software developed in-house (3)
Jenzabar (3)
Donorperfect
Donor2 (Campus Management)
ASCEND
PastPerfect
ADS but converting to Banner 7/1/07
ALADIN-developed in-house
Paradigm
eTapestry
Benefactor; moving to Raisers Edge
Excel
RuffaloCody's ONE