

Strategies for Supporting Advancement and Development

Matching Gifts

2008 Matching Gifts Best Practices Survey

Survey Results



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Matching Gifts Best Practices Survey Results

Following, are the results of the 2008 Matching Gifts best practices survey.

Wherever possible, the results have been compared to previous surveys in this document. For additional details on other surveys, 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?

	2008	2007	2006
Yes	99.0%	95.9%	98.7%
No	0.8%	0.0%	0.6%
No answer/uncertain	0.3%	4.1%	0.6%

Your Matching Gifts Program

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

	2008	2007	2006
Yes	67.1%	66.1%	72.0%
No	20.6%	20.2%	12.7%
Planning Within 1 Year	6.8%	5.5%	11.5%
Planning 1-2 Years from Now	2.9%	2.2%	0.6%
Planning More than 2 Years from Now	0.3%	1.6%	0.6%
No answer/uncertain	2.3%	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?

	2008	2007	2006
Advancement Services	47.4%	49.7%	44.6%
Annual Giving	67.7%	68.9%	67.5%
Corporate Foundation Relations	9.7%	13.1%	10.2%
Membership	3.9%	3.8%	1.9%
Other	13.5%	12.6%	9.6%

Other answers included:

All solicitations include Matching Gift information regardless of the office making the solicitation.
 We don't have divisions (3)
 The Office of Institutional Advancement (our shop is too small to have the divisions listed above)
 No one has this responsibility; we depend on the donor to self-identify.
 Development
 Gift Processing (10)
 Unit based Development and/or Annual giving programs in the schools/colleges
 Corporate Relations staff
 Budget is Annual Giving, program management is Records (Information Services) & Annual Giving
 Development Department (3)
 None at this time
 WNMU-TV and FM public broadcasting
 Foundation Stewardship Services Office
 We're such a small organization, our only staff is a 1/2 time festival manager.
 Alumni (2)
 Foundation Stewardship Services Office
 I'm a one person shop.
 Accounting, Development
 Not one group
 External Affairs
 Not on the VP's agenda, but Adv. Svcs gift staff work on this area.
 We are a small organization - not structured on those lines.
 Foundation is currently but new process beginning on working with Advancement Services.
 Not sure how to improve it.
 Administrative Services of University Development
 Gifts office that works with all of the above offices.

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.)

	2008	2007	2006
Advancement Services	21.6%	18.0%	22.3%
Annual Giving	64.8%	65.0%	64.3%
Corporate Foundation Relations	13.5%	16.4%	15.9%
Membership	2.9%	4.9%	3.2%
Other	24.2%	27.3%	17.2%

Other answers included:

- We don't divide credit among divisions
- Fiscal credit goes to receiving department or direction of the gift (14)
- We don't have divisions (5)
- The match follows the gift (as long as there are no restrictions from the matching gift company), so it depends on the direction of the original gift. (2)
- The staff that solicited the original gift (3)
- Tracked University-wide and not on a departmental level
- The department that received the original gets fiscal credit for the matching gift.
- Capital Campaign (2)
- Gift Accounting
- All of the above.
- Gifts & records (2)
- Just those that were initially solicited through Annual Giving
- The credit is associated with the original gift, so as most of the gifts are annual in nature, AG gets most of the credit, but there are some gifts where a major gift officer gets credit.
- The matching gift may be designated to Endowment or sometimes Athletic Education
- Foundation/Corp gets fiscal credit unless the gift from a development officer's constituent and in that case they get the credit
- University Foundation
- Credited goes with the original gift if to annual fund otherwise just gifts.
- Individual Universities, schools and organizations of the Archdiocese of St. Louis.
- Unless the gift is specified for a specific match like scholarships or the capital campaign.
- Non-annuals
- General operating fund for the animals
- Capital giving
- We don't have any separate divisions - our department is only 5 people.
- Major Gifts/ Campaign (2)

Your Matching Gifts Program (Continued)

None

Development (2)

Advancement is one person, no divisions

Wherever the matching gifts are applied is who gets the fiscal credit for the gift

Development Department

Advancement Services, but we don't typically tout that "we" are raising money. The program is entirely our responsibility.

Capital Campaign, if applicable

Development as a whole.

Colleges

Counts towards overall campaign goal

All giving

No credit to department specifically (10)

Your Matching Gifts Program (Continued)

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

	2008	2007	2006
Average # of Positions	.61	.45	.72
Median # of Positions	.25	Not Calculated	Not Calculated

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)?

	2008	2007
\$50 Million or more	0.0%	0.0%
\$10,000,000 - \$49,999,000	3.2%	.7%
\$2,500,000 - \$9,999,000	2.4%	1.4%
\$1,000,000 - \$2,499,000	5.1%	8.1%
\$250,000 - \$999,999	18.6%	12.8%
\$50,000 - \$249,999	34.0%	32.4%
\$20,000 - \$49,999	12.3%	19.6%
\$19,999 or less	20.6%	20.3%
N/A	4.0%	4.7%

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

	2008	2007
\$1,000,000 or more	1.2%	0.0%
\$250,000 - \$999,999	4.0%	2.0%
\$50,000 - \$249,999	8.7%	6.7%
\$20,000 - \$49,999	24.1%	23.5%
\$19,999 or less	27.7%	24.8%
N/A	34.4%	43.0%

Your Matching Gift Revenues (Continued)

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

	2008	2007
\$50 Million or more	13.4%	14.1%
\$10,000,000 - \$49,999,000	28.1%	28.2%
\$2,500,000 - \$9,999,000	31.6%	26.2%
\$1,000,000 - \$2,499,000	12.3%	11.4%
\$250,000 - \$999,999	6.3%	8.7%
\$50,000 - \$249,999	3.6%	4.0%
\$49,999 or less	1.2%	0.7%
N/A	3.6%	6.7%

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

	2008	2007
N/A	5.6%	6.8%
Less than 10%	87.4%	89.2%
10-20%	6.3%	4.1%
21-25%	0.4%	0.0%
26-30%	0.0%	0.0%
30-39%	0.4%	0.0%
40% or More	0.0%	0.0%

Your Matching Gifts Program (Continued)

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

	2008	2007
Increase 100% or More	1.6%	0%
Increase 50-99%	2.4%	0.7%
Increase 26-50%	6.3%	3.4%
Increase 0-25%	39.5%	43.9%
No Change	14.2%	22.3%
Decrease 0-25%	11.9%	8.8%
Decrease 26-50%	2.4%	2.0%
Decrease 50-99%%	0.4%	1.4%
Decrease 100% or More	0.0%	0.0%
Uncertain	21.3%	17.6%

Our Partners and Vendors

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

	2008	2007	2006
Yes	62.4%	55.8%	65.0%
No	32.9%	35.5%	29.9%
Planning Within 1 Year	2.5%	6.5%	1.9%
Planning 1-2 Years from Now	1.3%	0.7%	1.3%
Planning More than 2 Years from Now	0.0%	0.7%	0.6%
No answer/uncertain	0.8%	0.7%	1.3%

Our Partners and Vendors (Continued)

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

	2008	2007	2006
Blackbaud Matchfinder	7.5%	5.7%	5.7%
SAGE Millennium GM	2.3%	Not a Choice	Not a Choice
CASE MG Clearinghouse	27.0%	52.3%	45.9%
HEP Giftplus	35.1%	63.6%	40.1%
HEP CASE Matching Gift Network	51.7%	Not a Choice	Not a Choice
Other Vendor	5.7%	Not a Choice	2.6%

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

	2008	2007	2006
Inserts	43.5%	35.0%	39.5%
Online Search	69.5%	68.0%	55.4%
Hard Copy Directory	26.0%	37.0%	35.7%
Post-its	6.8%	13.0%	5.7%
Employment Data Screening	17.5%	13.0%	6.4%
Other Products	9.6%	12.0%	5.7%

Other answers included:

Campus Call/HEP software (4)
 Proplatinum
 Directory of Matching Gift Companies
 HEP MG online lookup HEP MG Policy w/ Advance HEP MG Policy w/ Smartcall
 Internal reminders on documents.
 Mailings and annual appeal materials including separate mailings (3)
 On our remittance envelope
 Identify prospects who work for matching companies from database
 Notation on receipt (2)
 Postcards In house, e-mail campaigns

Vendor Product Performance

1. Inserts – standard or customized to your organization.

	2008	2007
Increase 100% or More	0.7%	0.0%
Increase 50-99%	0.7%	0.0%
Increase 26-50%	0.7%	1.4%
Increase 10-25%	8.2%	9.9%
Increase Less than 10%	13.4%	14.1%
No Change	15.7%	18.3%
Decrease Less than 10%	0.0%	0.0%
Decrease 10-25%	1.5%	2.8%
Decrease 26-50%	0.0%	0.0%
Decrease 50-99%%	0.0%	0.0%
Decrease 100% or More	0.0%	0.0%
Uncertain	59.0%	53.5%

Vendor Product Performance (Continued)

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

	2008	2007
Increase 100% or More	0.0%	0.0%
Increase 50-99%	1.9%	1.2%
Increase 26-50%	0.6%	2.4%
Increase 10-25%	7.5%	8.4%
Increase Less than 10%	12.5%	20.5%
No Change	13.1%	14.5%
Decrease Less than 10%	0.0%	0.0%
Decrease 10-25%	0.0%	1.2%
Decrease 26-50%	0.0%	1.2%
Decrease 50-99%%	0.6%	0.0%
Decrease 100% or More	0.0%	1.2%
Uncertain	63.8%	49.4%

Vendor Product Performance (Continued)

3. Hard copy directory.

	2008	2007
Increase 100% or More	0.0%	0.0%
Increase 50-99%	0.0%	0.0%
Increase 26-50%	0.0%	0.0%
Increase 10-25%	4.3%	3.1%
Increase Less than 10%	8.6%	13.8%
No Change	21.6%	30.8%
Decrease Less than 10%	0.9%	0.0%
Decrease 10-25%	0.0%	0.0%
Decrease 26-50%	0.0%	1.5%
Decrease 50-99%%	0.0%	0.0%
Decrease 100% or More	0.0%	0.0%
Uncertain	64.7%	50.8%

Vendor Product Performance (Continued)

4. Post-its.

	2008	2007
Increase 100% or More	0.0%	0.0%
Increase 50-99%	0.0%	2.4%
Increase 26-50%	0.0%	0.0%
Increase 10-25%	3.3%	0.0%
Increase Less than 10%	3.3%	4.8%
No Change	18.7%	31.0%
Decrease Less than 10%	0.0%	0.0%
Decrease 10-25%	0.0%	0.0%
Decrease 26-50%	0.0%	0.0%
Decrease 50-99%%	0.0%	0.0%
Decrease 100% or More	0.0%	0.0%
Uncertain	74.7%	61.9%

Vendor Product Performance (Continued)

5. Employment Data Screening.

	2008	2007
Increase 100% or More	0.0%	0.0%
Increase 50-99%	1.0%	0.0%
Increase 26-50%	1.0%	4.5%
Increase 10-25%	3.8%	2.3%
Increase Less than 10%	6.7%	9.1%
No Change	15.2%	29.5%
Decrease Less than 10%	1.9%	0.0%
Decrease 10-25%	0.0%	0.0%
Decrease 26-50%	0.0%	0.0%
Decrease 50-99%%	0.0%	0.0%
Decrease 100% or More	0.0%	0.0%
Uncertain	70.5%	54.5%

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

Bought the directory, consult it frequently but have not found any new matching gifts through it.
Proplatinum

We promote Matching Gifts on-air on both WNMU TV and FM. We find the on-air announcements the most effective for increasing matching gifts to the stations.

Mailings and annual appeals: shows a steady increase of 25% in the past 4-years

Word of mouth and our solicitation letters work best. We cancelled CASE online as it was ineffective

We also gather company electronic matching gift forms and link the forms to the company record in our database. When donors give and work for a matching gift company, we automatically mail them the matching gift with their pledge confirmation and gift receipts. This act only has increased our matching gift program by more than 100%.

We simply include a line on gift response cards asking if donor's employer will match gifts.

Thank you postcards generated in house, help to gently remind as well as thank you

Bookmarks - if we notice a donor has a mg company we include a bookmark that says "You can increase your gift" and if they do send a form in with their gift we include a bookmark that says

Thank you"

Vendor Product Performance (Continued)

7. 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?

	2008	2007	2006
Yes	18.8%	22.5%	17.8%
No	72.8%	69.8%	65.6%
No answer/uncertain	8.5%	7.8%	16.6%

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

Better employment Including email
 A service that will email forms and/or directions to a donor (employee) for submitting a MG form AFTER the donation has been made. We often get comments "how do I submit the form?" "Where do I get it?"
 I use data collected from all sources and from the companies themselves to populate corporate matching gift parameters. It's not automatically populated though. Manually selective.
 Accurate employment information. It is much easier to get a match if you already know for whom the donor works.
 Display promotional ads that can be placed in University and other local publications including our station program guide and for use on our web site. There are very few visual and promotional materials available for promoting matching gifts to donors.
 At this time the online services seem to be the best tool.
 Information on K-8 schools that is by itself at a reasonable cost.
 How often the match is distributed so a follow-up can be made on outstanding match amounts.
 A simple list of companies that match gifts.
 The ability to calculate the number of "hits" on the website when donors log on to see if companies match.
 A database with codes for company and subsidiaries with match info that we could load and update to our system
 Not really under the control of vendors, but an emphasis to encourage corps to reimplement or expand their matching gift programs, i.e. stop the bleeding out of discontinued or reduce program support.
 Uncertain. For us it is most important to know where our constituents work, and are biggest need is for more data on our donors.

Vendor Product Performance (Continued)

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

	2008	2007	2006
Too expensive	42.6%	39.7%	12.7%
Ineffective	8.9%	10.3%	4.5%
No real return on investment	18.8%	19.0%	8.3%
Donors asked not to receive inserts or other materials	1.0%	0.0%	0.6%
Can do in house more effectively	13.9%	22.4%	10.8%
Unsure of potential benefits	37.6%	29.3%	12.7%
Other reasons	18.8%	22.4%	5.7%

Other reasons included:

Lack of manpower, training, time (3)

As a medical school our donor base is almost entirely private practice. Therefore no company matching gifts.

You have to know where your constituents work in order for the vendor's products to be effective and this data changes so frequently its hard to maintain

Challenges transferring data.

With companies changing their matching gift policies so often we could not count on the accuracy of the information printed on inserts and brochures listing matching companies.

Communications company has produced the best results in our not-for-profit area.

Word of mouth and our solicitation letters work best. We cancelled CASE online as it was ineffective

Can modify own list & brochures vs. expense of vendor production

Never knew such a thing existed before reading this survey

Very few businesses in our area match gifts. Most of our population lives in our area. Do not have enough employment information.

We have loaded HEP/Case data once. We need to load it again. The data they provide is not very easy load. Need to know new companies, inactive companies and changes to existing companies.

The quality of the "canned" matching gift inserts is poor - and diminish the appearance of the overall mailing. Would like upgraded promo pieces.

Timing. They were slow to get us through the process so then it wasn't very effective.

May be more appropriate once we have an established culture of philanthropy.

Vendor Product Performance (Continued)

10. Any other comments on matching gift products and services provided by vendors?

REALLY clear and understandable restrictions ESP. when it comes to Athletic gifts!!!!

The company lookup often returns "No Match" when there really is one. Maybe the vendor could loosen the search criteria.

I think the on-line search is great for donors to be able to check to see if their gifts are eligible for matching funds. These services could be enhanced by making the search engine as responsive and user friendly as possible...make sure search is not case sensitive, hyphens and exact names should not be required to access company info. One word in the company name should be all that's required to pull up a name.

We recently purchased the employment data screening product, so we aren't sure of the tangible results yet.

Most current vendors are out of touch with what organizations really need for matching gifts.

Taking tuna and slapping a matching gift label on the can does not cut it. If vendors really want to help and provide a good matching gift product to vendors, they need help and good networking with people who have proven results.

Being able to send our constituents information about their matching gift company and giving them that link electronically is a very exciting tool. Since we have only been using this for less than a year, we can not commit to any figures on how well it's working.

Broad spectrum of participants - would like a comprehensive list of mg companies whose criteria meet our mission to avoid non-qualifying submissions which waste staff time & resources

They are improving. It would be great to have readily available and consistent information for NPO and United Way matches and gifts.

We would like to make donors aware of their potential matching gift companies.

I have a budget of \$3000, so can't afford most of the products/services.

Would like to see a generic matching gift list established for our sharing.

We just don't know how to handle this process.

The Matching Gift Fundraising Cycle

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

	2008	2007	2006
Site defined text inserted into solicitation piece	61.7%	68.6%	62.6%
Site defined text inserted into receipt	38.8%	37.2%	38.9%
Leaflet listing matching gift programs inserted into solicitation piece	25.9%	25.6%	33.8%
Leaflet listing matching gift programs inserted into receipt	12.4%	14.0%	14.7%
Direct interaction with donors during phonathons	61.7%	66.1%	59.9%
Information posted on your institution's web site	75.6%	66.1%	74.5%
Focus groups or other networking/communication strategies with constituents in companies that have matching gift programs	4.0%	4.1%	5.1%
Other (please specify)	23.4%	21.5%	17.2%

Other answers included:

After the donor makes their gift, and if they are linked to a MG company, then a specific letter is sent asking them to fill out the MG paperwork. Post it note put on every pledge letter from our call center. Flyers are also handed out at alumni events and alumni visits to corporations.

Direct request through personal visits/solicitation

None used; we depend on the donor to self-identify

We send a letter (4).

Most solicitation pieces ask donor if they work for a matching gift company or if they are having their gift matched.

Receipts are not standard, Annual Fund places it in the email. We send a letter to all donors who are match eligible who have not submitted a form.

Team packets for events. Promoted through all online giving channels.

We send email thank you's, not receipts and at that time we remind them about matching gifts.

We also send reminders after 2 weeks and then at the end of that quarter.

Verbiage in alumni newsletter & Annual President Report of Donors

Post-its; educational pieces in alumni magazine

Direct interaction between development officers and donors.

Monthly audit and follow up with Donors

A half page please make a "Matching Gift" promotional piece. Almost like an ad for matching gifts.

On-air announcements

Matching Gift Mailing to all potential matching gift alumni

Reminders in campus quarterly publication

Word of mouth through our constituents

Noted on remittance envelope: My company will match my gift.
Handwritten notes on acknowledgement letters
Information in Charitable Giving Report
Mail the matching gift forms directly to donor with pledge confirmations and receipts.
Sent letter to donors for whom we had not received their match
Postcards are sent to any donor related to a MG company
List matching donors and companies once a year in the colleges quarterly magazine. Replay envelope has check box for soliciting more information on corporate matching. Verbally educate on corporate matching at a large special event each year.
Send letters to those who did not send in matching gift form and to those who did not make a gift, telling them about chance to double their gift.
Reminders to donors who we have not recieved matching gift forms from
We don't at this time
Just created Corporate Giving Opportunities brochure to be given to supporters and clients.
Next day e-mails and separate mailings
Letters & e-mails to donors requesting matching applications. Articles about matching/matching donors in publications.
Text inserted into solicitation piece without referencing a site.
After the gift through follow-up on those we know work for MG companies.
Matching Gift form inserted into receipt
Mail postcards to donors
Interaction with donors after phonathons. Information posted on remittance envelopes.
Direct conversations with donors and mention it in P.S. of thank you letters.
Personalized correspondence directed to those with match potential
Follow up letter to potential MG donors
Advertisements in university publication like the magazine.
Question on gift response card asking if employer matches gifts.
Confirming letter sent every 24 months to confirm status of those that we think work for a matching gift company
Letter informing them that they work for a MG company if we didn't receive a MG form from them with their donation.

The Matching Gift Fundraising Cycle (Continued)

2. How effective have these methods been?

Results for 2008

	No effect	Some effect	Great effect	Uncertain	N/A
Site defined text inserted into solicitation piece	1.2% (2)	39.9% (67)	6.5% (11)	27.4% (46)	25.0% (42)
Site defined text inserted into receipt	0.0% (0)	23.1% (34)	6.8% (10)	25.2% (37)	44.9% (66)
Leaflet listing matching gift programs inserted into solicitation piece	1.5% (2)	23.4% (32)	2.2% (3)	19.0% (26)	54.0% (74)
Leaflet listing matching gift programs inserted into receipt	1.5% (2)	12.1% (16)	3.0% (4)	16.7% (22)	66.7% (88)
Direct interaction with donors during phonathons	1.8% (3)	38.7% (65)	19.6% (33)	19.6% (33)	20.2% (34)
Information posted on your institution's web site	3.0% (5)	40.8% (69)	5.9% (10)	37.9% (64)	12.4% (21)
Focus groups or other networking/communication strategies with constituents in companies that have matching gift programs	1.6% (2)	6.5% (8)	4.1% (5)	12.2% (15)	75.6% (93)
Other	0.9% (1)	14.8% (17)	11.3% (13)	17.4% (20)	55.7% (64)

Results for 2007

	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)

The Matching Gift Fundraising Cycle (Continued)

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

	2008	2007	2006
Greater than 75%	6.4%	6.5%	12.7%
50 - 75%	17.8%	17.9%	6.4%
25 - 49%	26.7%	26.9%	26.8%
10 - 24%	24.3%	23.9%	28.0%
0 - 10%	18.3%	18.4%	16.6%
N/A	6.4%	6.5%	9.6%

The Matching Gift Fundraising Cycle (Continued)

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

	2008	2007	2006
Admission Applications or Enrollment Forms	30.7%	Not Asked	Not Asked
Alumni directory survey	65.6%	73.0%	59.2%
Collection of business cards at events	47.9%	49.5%	44.0%
Individual surveys (follow up to address changes, etc.)	44.8%	41.4%	49.7%
Professional and other specialized directories	10.9%	13.5%	12.7%
Phonathon staff asking for employment information	68.2%	73.9%	61.8%
Buck slips and information update cards in all publications	18.8%	19.8%	22.3%
Advertisements in publications to collect information	7.8%	13.5%	12.7%
Information update form or other data harvesting mechanisms on your web site	44.3%	47.7%	40.8%
Working with your career center	9.4%	9.0%	8.9%
Career networking within your online alumni community	10.4%	17.1%	16.6%
Internet searches	30.2%	33.3%	30.6%
Running your database through screening services	24.0%	29.7%	23.6%
Other	8.3%	14.4%	8.9%

Other answers included:

Proplatinum

Class Reunion Surveys

Follow up letter

Event registration forms

All pledge reminders, thank yous, receipts and reminder letters ask for updates as do all emails.

Out of Office replies to Monthly Email Newsletter. Ask Development officers to ask about

employment for large donors.

Prospect Research (2)

Direct Ask.

Obtained thru Business Reply envelopes with donations

Solicitation pieces that have space for donors to fill in information.

The Matching Gift Fundraising Cycle (Continued)

5. How effective have these strategies been?

Results for 2008

	No effect	Some effect	Great effect	Uncertain	N/A
Admission applications or enrollment forms	3.7% (5)	20.9% (28)	23.1% (31)	8.2% (11)	44.0% (59)
Alumni directory survey	0.0% (0)	32.9% (53)	32.3% (52)	11.8% (19)	23.0% (37)
Collection of business cards at events	0.0% (0)	38.4% (56)	18.5% (27)	12.3% (18)	30.8% (45)
Individual surveys (follow up to address changes, etc.)	0.0% (0)	31.7% (44)	20.9% (29)	12.9% (18)	34.5% (48)
Professional and other specialized directories	0.9% (1)	14.5% (17)	2.6% (3)	8.5% (10)	73.5% (86)
Phonathon staff asking for employment information	2.5% (4)	42.6% (69)	26.5% (43)	9.9% (16)	18.5% (30)
Buck slips and information update cards in all publications	2.4% (3)	26.6% (33)	3.2% (4)	7.3% (9)	60.5% (75)
Advertisements in publications to collect information	2.6% (3)	7.8% (9)	3.4% (4)	8.6% (10)	77.6% (90)
Online community update form or other data harvesting mechanisms on your web site	2.1% (3)	29.1% (41)	20.6% (29)	11.3% (16)	36.9% (52)
Working with your career center	2.6% (3)	12.0% (14)	4.3% (5)	6.8% (8)	74.4% (87)
Career networking within your online alumni community	3.3% (4)	14.2% (17)	5.8% (7)	9.2% (11)	67.5% (81)
Internet searches	0.8% (1)	31.3% (40)	11.7% (15)	10.9% (14)	45.3% (58)
Running your database through screening services	1.6% (2)	21.4% (27)	6.3% (8)	7.1% (9)	63.5% (80)

The Matching Gift Fundraising Cycle (Continued)

Results for 2007

	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)

The Matching Gift Fundraising Cycle (Continued)

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

	2008	2007	2006
Yes	6.0%	10.9%	10.2%
No	80.5%	78.2%	14.0%
Planning Within 1 Year	0.5%	2.5%	0.0%
Planning 1-2 Years from Now	0.5%	1.7%	0.0%
Planning More than 2 Years from Now	0.0%	0.0%	0.0%
No answer/uncertain	12.5%	6.7%	75.8%

The Matching Gift Fundraising Cycle (Continued)

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

	2008	2007	2006
Yes	22.1%	25.2%	30.6%
No	61.3%	58.8%	58.0%
Planning Within 1 Year	1.5%	4.2%	0.0%
Planning 1-2 Years from Now	2.0%	1.7%	0.0%
Planning More than 2 Years from Now	0.5%	0.8%	0.0%
No answer/uncertain	12.6%	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?

	2008	2007
Monthly	2.9%	1.3%
Quarterly	8.1%	9.1%
Semi-Annually	6.6%	10.4%
Annually – just before the close of the Fiscal Year	8.8%	3.9%
Annually – just before the end of the calendar year	2.2%	2.6%
Random – as required	58.8%	59.7%
Other	12.5%	13.0%

The Matching Gift Fundraising Cycle (Continued)

Other answers included:

Contact corporations/foundations concerning outstanding matches when a substantial time period has passed from the date the match was applied for. This also depends on the distribution schedule of corporation/foundation.

We are in the process of setting up a system. We hope to have it up this year and remind them twice a year.

We note due date and follow up if due date is passed. If gift is over 2,500 we verify matching gift company has received the application

Weekly

Every Day

Have not had any problems with matching gift requests not being fulfilled.

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?

	2008	2007
Monthly	15.2%	12.4%
Quarterly	15.9%	13.5%
Semi-Annually	2.8%	1.1%
Annually – just before the close of the Fiscal Year	3.4%	2.2%
Annually – just before the end of the calendar year	1.4%	1.1%
Random – as required	46.9%	44.9%
Other	14.5%	24.7%

Other answers included:

Every time a gift is received and our records have them linked to a MG. If we haven't received their form in one month, a letter along with their filled out MG form (if available) will be mailed to them asking them for their signature.

N/A, although we would like to start sending out reminders

Within the year, we will be doing this quarterly.

1st request with gift received; 2nd request 4-6 weeks after 1st letter.

2 weeks after gift. Then if still no form, we send a quarterly reminder but they only get a total of two reminders.

We do not. We have found that most donors become turned off by this approach. They become frustrated if there is a problem with their matching gift company. We take these steps by calling the company, determining any issues, and then clearly notifying the donor if they need to do anything. We take the hassle out of matching gifts by immediately sending them the form with their pledge or gift receipt.

90 day reminder letter, email follow-up at 100 days.

Personal phone call if it is noticed that they have made a matching gift in recent history & application was not enclosed

Weekly

Monthly to Quarterly-this is a new process and we are still figuring out the best way/time to contact people

Semi-monthly reminders plus quarterly follow up

1st request monthly, 2nd requests sent quarterly, 3rd request semi-annually. All requests include either MG application or instructions on where to go for matching app.

Have not had any problems with matching gift requests not being fulfilled.

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?

	2008	2007	2006
Yes	72.4%	71.7%	74.5%
No	21.6%	18.3%	13.4%
Planning Within 1 Year	0.5%	0.0%	0.0%
Planning 1-2 Years from Now	0.5%	0.0%	0.0%
Planning More than 2 Years from Now	0.0%	0.0%	0.0%
No answer/uncertain	5.0%	10.0%	12.1%

Other answers included:

Our athletics does but the Foundation doesn't.
We apply matching gift amounts as soft credits to donor giving levels - this may entitle them to a higher giving level for participation in a VIP donor program.

11. Do you send a postcard, letter or email to individual donors/employees when their gift is matched? (New question for 2008 survey)

	2008
Yes	51.0%
No	38.4%
Planning Within 1 Year	4.5%
Planning 1-2 Years from Now	1.5%
Planning More than 2 Years from Now	0.0%
No answer/uncertain	4.5%

Other answers included:

We only do emails so only those donors who have an email address are notified.
Yes on higher-end donations.
Thank them at the same time their gift acknowledgement is sent - within 1 day of receipt of gift
Sometimes

The Matching Gift Fundraising Cycle (Continued)

12. Do you include matching gifts when calculating corporate recognition donor honor rolls/recognition for philanthropy? (New question for 2008 survey)

	2008
Yes	65.5%
No	17.5%
Planning Within 1 Year	0.5%
Planning 1-2 Years from Now	0.5%
Planning More than 2 Years from Now	0.0%
No answer/uncertain	16.0%

The Matching Gift Fundraising Cycle (Continued)

13. What matching gift stewardship ideas have you found to be the most effective or felt were the most interesting? (New question for 2008 survey)

We found that mini campaigns and volunteer involvement programs are interesting and also a way to provide matching gifts revenue.

Personal touch

I think that the Thank you card will be effective.

Personalized letters to the donor Including the matching gift form and return envelope

Including company matching gift forms (when available) when sending receipt to donor. Donors love the ease associated with the process.

Most effective - Hand written thank you note to the employee/donor when the gift is received from their employer

Listing in our alumni magazine, alumni freebies like bumper stickers and post-its, and photo and bio recognition to them and their employer on our web site.

The created information that we send with the reminder letter specific for the donor with their company information is the most effective. Large donor gifts are followed up by the major gifts officers.

Thank you's and notification to those who have gone to the trouble of sending in the match.

Emailing constituents if they normally match and we've not received their form.

Annual report to donors special listing

The email thank you that goes out weekly to donors when their gift is matched.

When I receive an application, I e-mail the donor verifying receipt, thanking them, and letting them know I'll notify them when the matching funds are received.

Inserts

Many of our donors are Thrivent Members and with this group we always send the matching gift form to them along with their receipt if they didn't include one with their gift. There is a very high success rate with this practice. The success rate is not quite as high if the form accompanies the pledge reminder card, but we still include one there in the hopes that they will send it in with the gift.

Outsourcing with MCR/HEP

Your Organization

1. Institution supported is:

	2008	2007	2006
Private	61.7%	54.8%	59.0%
Public	36.3%	43.5%	34.0%
Uncertain	2.1%	1.7%	7.0%

2. Type of organization:

	2008	2007	2006
Elementary/Secondary Education	12.6%	7.8%	9.0%
Post-secondary Education	62.9%	69.6%	74.0%
Other Academic/Research	3.1%	6.1%	3.0%
Hospital/Clinic	1.5%	0.0%	0.0%
Other Healthcare	1.0%	2.6%	3.0%
Aquarium/Zoo/Botanical Garden	1.0%	1.7%	1.0%
Science/Technology Museum	1.5%	0.9%	0.0%
Art or History Museum	0.0%	1.7%	1.0%
Other Museum	0.5%	0.9%	0.0%
Performing Arts Organization	1.0%	0.0%	1.0%
Global/National/Local Community Service	1.5%	1.7%	1.0%
Other	12.9%	7.0%	7.0%

Your Organization (Continued)

Other answers included:

PreK-12
Religious
Youth education/activity
Voluntary health organization
Charitable foundation
Children and Animal Welfare
Non Profit
Public Broadcasting station
Seminary
Nonprofit - education
Public radio station
International, Humanitarian
Campaign consultant to independent elementary/secondary educational institutions
Non-Profit
Rescue Mission
Post Graduate
Youth Service
Graduate University
Social Services to patients and families with ALS
NGO

Your Database and Fundraising Software

1. Number of constituent records in your database:

	2008	2007	2006
Average	132,744	123,433	149,013
Maximum	1,167,000	750,000	3,000,000
Minimum	228	100	0
Standard Deviation	189,484	147,993	288,323
1st Quartile	23,000	25,750	26,006
2nd Quartile	52,000	67,500	69,500
3rd Quartile	153,583	143,250	188,443

2. Your fundraising/development/advancement software:

	2008	2007	2006
Banner	14.7%	17.4%	15.0%
Datatel	6.2%	11.0%	8.0%
Millennium	10.2%	13.8%	8.0%
Raiser's Edge	33.3%	27.5%	25.0%
SunGard Advance	12.4%	13.8%	19.0%
Other	23.2%	16.5%	25.0%

Your Database and Fundraising Software (Continued)

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

Access Enterprise

ADIS

Agilon's ONE (2)

Allegiance Software Inc

Ascend (3)

Banner but we are converting to RE

Converting to eTapestry

Currently we use an in house software, soon to be moving to Raiser's Edge

Currently with Datatel; switching to Raiser's Edge by Aug. 1, 2008.

Donor Perfect (2)

Donor2 also known as Campuscornerstone (4)

Giftrak

In house, home grown or custom (7)

Jenzabar (3)

MoneyMaker

PeopleSoft

PIDI and Raiser's Edge

PIDI Donor Direct (and Raiser's Edge for a subset)

SAGE 50

SalesLogix

Senior Systems

Siebel

Viking

Comments on Survey

1. Are there any other elements, comments, additions, subtractions or any other suggestions you'd like to make on this survey so it can be improved the next time we do it?

We have several people who do bits and pieces of the information you are asking about. I may have answered them differently than they would have.

Your question about matching gift write-off's is ambiguous. What is your definition of a write off? Only those gifts that were sent in for submission? Or all gifts that we considered eligible? We set up an expectancy at the time the gift is made if it's eligible whether a form is received or not. So our write-off's total includes all gifts, form or no form, that we deemed eligible for a match.

Define what you mean by "how much potential matching gift income did you write off"? Some questions are hard to understand for those of us working on a small scale (small nonprofit, college, etc)--not familiar with all the language you use.

The percent of matching dollars measured against annual giving total would be an interesting value.

Suggest follow up questions to be grouped - for example, if you answer "no" to using a vendor service, you shouldn't have to scroll through all the vendor follow up questions. You should just say, go to such and such number if you answered no.

How do institutions recognize donors generating the matching gifts? Do donors get "credit" for the corporate matching amts in donor recognition publications?

More ideals on how to start a matching gift program.

Maybe send an email ahead of time listing what type of information you need that would need to have a report run to answer it.