

Strategies for Supporting Advancement and Development

Matching Gifts

2009 Matching Gifts Best Practices Survey

Survey Results



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Matching Gifts Best Practices Survey Results

Following, are the results of the 2009 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?

	2009	2008	2007	2006
Yes	95.9%	99.0%	95.9%	98.7%
No	2.3%	0.8%	0.0%	0.6%
No answer/uncertain	1.8%	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?

	2009	2008	2007	2006
Yes	60.0%	67.1%	66.1%	72.0%
No	23.4%	20.6%	20.2%	12.7%
Planning Within 1 Year	9.6%	6.8%	5.5%	11.5%
Planning 1-2 Years from Now	1.4%	2.9%	2.2%	0.6%
Planning More than 2 Years from Now	.8%	0.3%	1.6%	0.6%
No answer/uncertain	4.8%	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?

	2009	2008	2007	2006
Advancement Services	38.0%	47.4%	49.7%	44.6%
Annual Giving	67.6%	67.7%	68.9%	67.5%
Corporate Foundation Relations	11.8%	9.7%	13.1%	10.2%
Membership	4.5%	3.9%	3.8%	1.9%
Other	14.4%	13.5%	12.6%	9.6%

Other answers included:

Check/Gift Processors/Gift Operations (4)
 Donor Relations
 Principal of School and Development Team
 Major Gifts (2)
 Office of Alumnae Relations/Affairs (2)
 Fund Development
 Marketing and Development Operations
 No staff person makes Matching Gifts a priority, but sometimes volunteers take the lead in promoting this type of gift among their peers.
 Development Office (5)
 Our Fundraiser
 We do not have divisions. I am the director and I have an administrative assistant who I share with PR.
 Academic Units
 Our accounting and receipting areas have involvement as well.
 Only one person in advancement or small shop. (6)
 Nobody, not assigned . (3)
 College Development Officers (2)
 While we do not have a defined plan, the entire advancement office participates in requests for matching gifts - from the student telethon callers to Advancement officers.
 No real plan or division We are a small organization. We do put matching gift info in every donor thank you letter and into newsletters, etc.
 Advancement Department of which Advancement Services is a part.
 Direct mail. (2)
 Gift Processing Coordinator
 Customer Strategies
 Matching Gift Office, under Advancement
 We send out the flyer with the initial solicitation and then leave it to our constituents to follow up.



Your Matching Gifts Program (Continued)

Director of Development. This is a 1 1/2 person shop.

Donor Services and Development working together.

We promote matching gifts with every donor solicitation by including leaflet in every mailing.

It's under the AG Budget and they do the mailings & emails, but the administration comes from Records which is part of IT Services.

Not sure at this time; might be our annual giving person.

Stewardship Services Office

E-revenue (2)

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.)

	2009	2008	2007	2006
Advancement Services	20.3%	21.6%	18.0%	22.3%
Annual Giving	63.4%	64.8%	65.0%	64.3%
Corporate Foundation Relations	14.9%	13.5%	16.4%	15.9%
Membership	5.6%	2.9%	4.9%	3.2%
Other	22.3%	24.2%	27.3%	17.2%

Other answers included:

Donor Relations.

Depends on the purpose of the gift.

Auction team, principal, jog a thon team.

Originating school and college where gifts are solicited.

Endowments.

Major Gifts

Not sure, but probably annual giving or the person who solicited the gift.

Does not apply/not assigned. (19)

The matching gift gets credited towards whichever gift it actually matches so it depends on which financial system that allocation code is tied to.

Fund Development

Given to the same area that got credit for the original gift. (13)

Marketing

Whoever solicited the original gift (Major, Annual) would get fiscal credit.

Events if original funds were designated to an event

Development Income

Advancement/Development as a whole. (3)

Our Fundraiser

Area of support

Matching Gifts Coordinator

Area where gift is matched.

Capital Campaign

Academic Units

If the matching gift is matching a gift that came from a personal solicitation by a Development officer, that development officer will get the credit

Small shop. (2)

We credit gift to where designated, capital campaign or Annual Fund.

It depends on what type of gift Major or Annual

Your Matching Gifts Program (Continued)

There is no recognition from our institution as to who gets credit. Although the phonathon which I supervise receives a high percentage of matching gifts, these are not credited to either myself or my hard working students.

Direct Mail

Annual fund or Development depending on the fund designation and amount of the original gift.

Gift Operations

Restricted Giving

Posted back to original donation source, with a soft credit to the enhancing and improving department of Customer Strategies.

Matching Gift Office

Endowment, capital projects

Capital giving, if applicable.

We only have one Development department and we get credit for all matches. However, our annual fundraisers (auction and jogathon) also get a few donations/pledges with parents/donors sending in matching gift forms with their payments.

Development Staff when applicable.

Colleges

Direct marketing Major gifts

Your Matching Gifts Program (Continued)

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

	2009	2008	2007	2006
Average # of Positions	.48	.61	.45	.72
Median # of Positions	.25	.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)?

	2009	2008	2007
\$10,000,000 or More	3.7%	3.2%	.7%
\$2,500,000 - \$9,999,000	3.1%	2.4%	1.4%
\$1,000,000 - \$2,499,000	2.7%	5.1%	8.1%
\$250,000 - \$999,999	16.9%	18.6%	12.8%
\$50,000 - \$249,999	22.7%	34.0%	32.4%
\$20,000 - \$49,999	12.2%	12.3%	19.6%
\$19,999 or less	28.5%	20.6%	20.3%
Uncertain	10.2%	4.0%	4.7%

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

Note that the ranges for this question were changed in 2009 so that the results of the previous years were not directly comparable.

	2009
\$1,000,000 or more	1.0%
\$250,000 - \$999,999	2.0%
\$50,000 - \$249,999	7.1%
\$5,000 - \$49,999	10.2%
\$4,999 or less	30.2%
Uncertain	49.5%

Your Matching Gift Revenues (Continued)

	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)?

	2009	2008	2007
\$50 Million or more	11.9%	13.4%	14.1%
\$10,000,000 - \$49,999,000	20.0%	28.1%	28.2%
\$2,500,000 - \$9,999,000	26.4%	31.6%	26.2%
\$1,000,000 - \$2,499,000	14.9%	12.3%	11.4%
\$250,000 - \$999,999	10.2%	6.3%	8.7%
\$50,000 - \$249,999	5.8%	3.6%	4.0%
\$49,999 or less	3.7%	1.2%	0.7%
Uncertain	7.1%	3.6%	6.7%

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

	2009	2008	2007
Uncertain	16.6%	5.6%	6.8%
Less than 10%	78.3%	87.4%	89.2%
10-20%	4.4%	6.3%	4.1%
21-25%	0.0%	0.4%	0.0%
26-30%	0.0%	0.0%	0.0%
30-39%	0.0%	0.4%	0.0%
40% or More	.7%	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?

	2009	2008	2007
Increase 100% or More	3.1%	1.6%	0%
Increase 50-99%	1.0%	2.4%	0.7%
Increase 26-50%	5.1%	6.3%	3.4%
Increase 0-25%	36.6%	39.5%	43.9%
No Change	20.7%	14.2%	22.3%
Decrease 0-25%	10.8%	11.9%	8.8%
Decrease 26-50%	1.0%	2.4%	2.0%
Decrease 50-99%%	.7%	0.4%	1.4%
Decrease 100% or More	0.0%	0.0%	0.0%
Uncertain	21.0%	21.3%	17.6%

Our Partners and Vendors

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

	2009	2008	2007	2006
Yes	58.3%	62.4%	55.8%	65.0%
No	37.5%	32.9%	35.5%	29.9%
Planning Within 1 Year	1.9%	2.5%	6.5%	1.9%
Planning 1-2 Years from Now	.8%	1.3%	0.7%	1.3%
Planning More than 2 Years from Now	.4%	0.0%	0.7%	0.6%
No answer/uncertain	1.1%	0.8%	0.7%	1.3%

Our Partners and Vendors (Continued)

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

	2009	2008	2007	2006
Blackbaud Matchfinder	3.8%	7.5%	5.7%	5.7%
SAGE Millennium GM	.5%	2.3%	Not a Choice	Not a Choice
CASE MG Clearinghouse	Not a Choice	27.0%	52.3%	45.9%
HEP Giftplus	38.0%	35.1%	63.6%	40.1%
HEP CASE Matching Gift Network	64.1%	51.7%	Not a Choice	Not a Choice
Other Vendor	7.1%	5.7%	Not a Choice	2.6%

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

	2009	2008	2007	2006
Inserts	38.7%	43.5%	35.0%	39.5%
Online Search	68%	69.5%	68.0%	55.4%
Hard Copy Directory	23.2%	26.0%	37.0%	35.7%
Post-its	8.2%	6.8%	13.0%	5.7%
Employment Data Screening	14.9%	17.5%	13.0%	6.4%
Other Products	9.3%	9.6%	12.0%	5.7%

Other answers included:

Electronic directory for staff, but not general public.

Telemarketing software add-on for student caller usage. (2)

Gift Plus online and Gift Plus Campus Call

Matches from private foundations. State funded matches.

We do not use any services and have no plans to do so.

In-House Inserts (no vendor).

I have used the inserts another institution at which I worked and have used a hard copy directory (once in ten years) here. This is a law school with only about 2,000 alumni. We have a very small number of alumni and friends who work for companies with matching gift programs.

Our Partners and Vendors (Continued)

If they are working for a matching gift company, we mention it on their gift receipt. That helps to get the donor to initiate a matching gift thru their HR dept.

Follow-up letters.

Advanced searches on matching companies with additional company information that are available as an online subscription

Adding p.s. onto acknowledgement letters.

The hard copy directory is a leaflet.

Through phone center.

In-house insert with receipts.

Vendor Product Performance

1. Inserts – standard or customized to your organization.

	2009	2008	2007
Increase 100% or More	1.3%	0.7%	0.0%
Increase 50-99%	0.0%	0.7%	0.0%
Increase 26-50%	1.3%	0.7%	1.4%
Increase 10-25%	4.4%	8.2%	9.9%
Increase Less than 10%	12.6%	13.4%	14.1%
No Change	25.8%	15.7%	18.3%
Decrease Less than 10%	1.3%	0.0%	0.0%
Decrease 10-25%	.6%	1.5%	2.8%
Decrease 26-50%	0.0%	0.0%	0.0%
Decrease 50-99%	.6%	0.0%	0.0%
Decrease 100% or More	.6%	0.0%	0.0%
Uncertain	51.6%	59.0%	53.5%

Vendor Product Performance (Continued)

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

	2009	2008	2007
Increase 100% or More	2.2%	0.0%	0.0%
Increase 50-99%	1.7%	1.9%	1.2%
Increase 26-50%	1.1%	0.6%	2.4%
Increase 10-25%	6.1%	7.5%	8.4%
Increase Less than 10%	9.9%	12.5%	20.5%
No Change	15.5%	13.1%	14.5%
Decrease Less than 10%	1.7%	0.0%	0.0%
Decrease 10-25%	0.0%	0.0%	1.2%
Decrease 26-50%	0.6%	0.0%	1.2%
Decrease 50-99%	0.0%	0.6%	0.0%
Decrease 100% or More	0.0%	0.0%	1.2%
Uncertain	61.3%	63.8%	49.4%

Vendor Product Performance (Continued)

3. Hard copy directory.

	2009	2008	2007
Increase 100% or More	0.8%	0.0%	0.0%
Increase 50-99%	1.6%	0.0%	0.0%
Increase 26-50%	0.8%	0.0%	0.0%
Increase 10-25%	1.6%	4.3%	3.1%
Increase Less than 10%	5.4%	8.6%	13.8%
No Change	31.8%	21.6%	30.8%
Decrease Less than 10%	0.0%	0.9%	0.0%
Decrease 10-25%	0.0%	0.0%	0.0%
Decrease 26-50%	0.0%	0.0%	1.5%
Decrease 50-99%	0.8%	0.0%	0.0%
Decrease 100% or More	0.0%	0.0%	0.0%
Uncertain	57.4%	64.7%	50.8%

Vendor Product Performance (Continued)

4. Post-its.

	2009	2008	2007
Increase 100% or More	0.9%	0.0%	0.0%
Increase 50-99%	0.0%	0.0%	2.4%
Increase 26-50%	0.9%	0.0%	0.0%
Increase 10-25%	2.6%	3.3%	0.0%
Increase Less than 10%	2.6%	3.3%	4.8%
No Change	26.7%	18.7%	31.0%
Decrease Less than 10%	0.0%	0.0%	0.0%
Decrease 10-25%	0.0%	0.0%	0.0%
Decrease 26-50%	0.0%	0.0%	0.0%
Decrease 50-99%	0.0%	0.0%	0.0%
Decrease 100% or More	0.9%	0.0%	0.0%
Uncertain	65.5%	74.7%	61.9%

Vendor Product Performance (Continued)

5. Employment Data Screening.

	2009	2008	2007
Increase 100% or More	1.6%	0.0%	0.0%
Increase 50-99%	0.0%	1.0%	0.0%
Increase 26-50%	0.0%	1.0%	4.5%
Increase 10-25%	3.2%	3.8%	2.3%
Increase Less than 10%	4.8%	6.7%	9.1%
No Change	22.6%	15.2%	29.5%
Decrease Less than 10%	0.0%	1.9%	0.0%
Decrease 10-25%	0.0%	0.0%	0.0%
Decrease 26-50%	0.0%	0.0%	0.0%
Decrease 50-99%	0.0%	0.0%	0.0%
Decrease 100% or More	0.0%	0.0%	0.0%
Uncertain	67.7%	70.5%	54.5%

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

We mail reminder postcards designed by us if the donor works for a matching gift company according to our database and has not sent in a matching gift form within a month.

Have used inserts and post-its from local vendor.

GiftWorks - Love it!

Follow-up letters with forms - excellent experience.

I use Hoover's as well as a way to better understand the data I am searching for in HEP. I also use it to better target matching companies by employee size and corporate structure.

We developed a matching post card that is mailed out to donors whose new employer matches, and included in some mailings. It has enhanced our matching program.

Any matching gift materials we use are produced in-house.

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?

	2009	2008	2007	2006
Yes	18.7%	18.8%	22.5%	17.8%
No	72.0%	72.8%	69.8%	65.6%
No answer/uncertain	9.3%	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?

We are looking into using the automatic populating service.
 Automatic follow up with corporate matching.
 Maybe a service that would send out alerts when specific companies (which we subscribe to) make changes to their programs. All in all, just making sure the databases are kept up to date with accurate information.
 Database that automatically populates matching employers.
 Easy access to blank forms.
 Through Blackbaud, we are able to identify donors who work for matching gift companies. However, once those who are eligible make a gift, there is no way to flag these gifts to see how much potential money is out there. (According to our Database Manager.) As a result, we have had to come up with our own system to keep track of gifts that are eligible for a match. It would be helpful if Blackbaud could automatically do this, to save us time and work on our end.
 It would be nice to lobby "Easymatch" to use the same account number for the designated charities.
 People search of employment data
 Everything goes through our "parent" organization. We do not make those decisions.
 Corporate matching forms that can be more customized to our brand.
 They need commonly used identifiers used in business today, like the Dun and Bradstreet number, instead of a unique number that doesn't assist us in determining if it is the same company involved.
 Explanations of athletic matching rules for donors when logging into the abbreviated system.
 Lists of where people work so we could pre-determine what types of matching gift info to send to them.
 To have the HEP matching gift brochure available online without having to interface with our database. To be used strictly as a reference.
 Post cards: they can be handed out, included in mailers, or mailed alone. Instead of post-its, we now use the post cards, as they are more cost effective.
 Inexpensive annual link to the matching gift database. With the exception of the leaflets, your prices are out of range for our small parochial school. We used the searchable online database subscription for one year, but we do not have enough donors yet to cost justify.

Vendor Product Performance (Continued)

We have using in house matching gift card and follow-up letters to get our matching gift going. A free listing of matching gift companies that we could use to update our own list (which only lists companies that we have recently received matching gifts from).
Management of matching gifts processing, fulfillment, data management and reporting.

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?

	2009	2008	2007	2006
Too expensive	46.0%	42.6%	39.7%	12.7%
Ineffective	5.6%	8.9%	10.3%	4.5%
No real return on investment	16.1%	18.8%	19.0%	8.3%
Donors asked not to receive inserts or other materials	2.4%	1.0%	0.0%	0.6%
Can do in house more effectively	18.5%	13.9%	22.4%	10.8%
Unsure of potential benefits	36.3%	37.6%	29.3%	12.7%
Other reasons	15.3%	18.8%	22.4%	5.7%

Other reasons included:

Question does not apply because of the early stages of our planning.

Low % of database employed by matching gift companies.

I don't think we have ever thought of it, not aware of matching gifts. (2)

Too few of our alumni work in fields that are matching gift eligible. Many are self-employed or work in the nonprofit sector as pastors, teachers, health care providers, and small business owners.

Not considered or budgeted for.

Have not used matching gift services due to cost.

Hard copy directory becomes obsolete too quickly. Online information is more current.

Additional expense.

Our development database does not fully support any of these services. We are currently in a delayed-post-conversion cleanup environment as it pertains to the corps and organization records.

"Parent" organization making those decisions.

School of Ed has few matching gift alumni.

We upgraded from matching gift directories to HEP Gift Plus.

No time to focus on this right now, insufficient staff time. (2)

Difficult to be sure data is fresh and accurate, high expense, and paper use (not eco-friendly to include inserts).

I will likely discontinue the link as it was expensive and only produced one matching gift (our parent body consists of mostly entrepreneurs with very few big corporate connections/backgrounds); I will continue to use the leaflet/brochure as it will still be relevant for another year or so.

Staff time involved to research and purchase. Not sure how compatible services are with our database system.

Vendor Product Performance (Continued)

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

They don't really seem all that useful in our experience, at least, on our bottom line.

Interested in low cost alternatives.

Rules available for NPO and United Way gifts.

The Matching Gift Details directory and online service is fabulous. I appreciate it even though the majority of our donors do not work for matching gift companies.

The HEP staff is very helpful when you have a question.

We are trying to determine if using HEP will be cost effective for us given our database. If we do not use them, we will still incorporate something in-house to increase matching gifts.

More salesmanship. Few vendors/competitors doesn't mean lowered customer service. Show some professionalism.

We won't be increasing our use until things settle down with the economy and will continue with what our plan has been as many of our constituents worked in the NYC financial area and those companies are either gone or have discontinued their MG programs.

I have a \$3000 annual budget, too small to use most of your products. Maybe think about developing less expensive products for programs that have a small budget. As my program grows, so will my budget, and I'm looking forward to one day using more of your products. I've had to bootstrap my program.

Rules available for NPO and United Way matching gifts

Very good.

The data is not always up to date.

The Matching Gift Fundraising Cycle

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

	2009	2008	2007	2006
Site defined text inserted into solicitation piece	57.7%	61.7%	68.6%	62.6%
Site defined text inserted into receipt	28.6%	38.8%	37.2%	38.9%
Leaflet listing matching gift programs inserted into solicitation piece	23.8%	25.9%	25.6%	33.8%
Leaflet listing matching gift programs inserted into receipt	9.3%	12.4%	14.0%	14.7%
Direct interaction with donors during phonathons	56.4%	61.7%	66.1%	59.9%
Information posted on your institution's web site	74.0%	75.6%	66.1%	74.5%
Focus groups or other networking/communication strategies with constituents in companies that have matching gift programs	7.9%	4.0%	4.1%	5.1%
Other (please specify)	22.9%	23.4%	21.5%	17.2%

Other answers included:

Pledge card.

Once a gift is made, send a personalized letter to donor with either hard copy of matching gift form filled out form them asking for their signature, or giving them exact instructions on how to match their gift on-line.

Monthly mailings to people who make match eligible gifts. Corporate Agent Program - peer volunteers who send letters and answer questions regarding the employee benefit offered to them.

Inclusion of matching forms, mention at special events.

Not promoting matching gifts.

Immediate follow-up by phone/e-mail when we do not receive a form from a donor with known matching potential.

Follow up postcard.

Individualized in donor communications/thanking.

Question posed directly on enrollment form.

We let our Marathon Runners know on an informal basis.

General marketing to Rotary clubs and districts -- most of which is not applicable to our membership.

Information included in correspondence with donors.

Postcard sent to donors who have recently given, if their employer matches gifts and gift processing did not receive a matching gift form with gift.

Personal memos and phone calls for the sole purpose of educating donors on how they can increase their giving through matching gifts.

Reminders to donors who we have not received matching gift forms from.

The Matching Gift Fundraising Cycle (Continued)

Postcard sent to donor if MG form did not come with gift. Postcard serves as a reminder that their employer matches gifts and is a soft ask to submit a matching gift form.

Newsletter.

Text included in alumni magazine articles and some solicitation mailing pieces.

Reminders in e-newsletters.

Insert into pledge receipts for donors who work for matching gift company

Communication through our school newsletter.

Individual letters are sent when we know they work for a company that matches, but they did not enclose a form.

Follow-up letters to matching eligible donors without claims.

Magazine ads.

Reminder text on flaps of BREs.

Letters sent to donors who our records showing as working for a MG company.

On-site kiosks.

Direct interaction with participants that will be asking donors for a gift to also ask if their company matches or provide them with a list of matching companies, so they know in advance that the donor's company matches and ask for submission.

Phonathon.

Send follow up post cards and letters with matching gift forms/web sites etc as time allows

We send a lot of letters & emails, and follow up in a timely fashion.

Matching gift search built into online donation form through Convio.

Site defined notification of eligible match through a letter.

Emphasized in our campaign volunteer training.

I call donors that work for matching gift companies.

Personal solicitation via email or hand-written notes.

Articles about matching & matching donors in newsletters & magazines, postcards, site defined text inserted into return envelopes.

Make copy of match info and include it in personal solicitation packets.

Follow-up letters

Newsletter articles.

In house cards and letters are sent to donors.

Separate Letter after gift is made.

Reminder Letter Program

Letters to donors requesting matching forms

Insert with special event thank you informing donors that the donation portion of their event fee may be eligible for a company match.

Annual Giving website; Reminder to file matching gift application through email blast with their company name and allocation the gift went to.

The Matching Gift Fundraising Cycle (Continued)

2. How effective have these methods been?

Results for 2009

	No effect	Some effect	Great effect	Uncertain	N/A	Response Count
Site defined text inserted into solicitation piece	2.0% (4)	41.2% (82)	11.6% (23)	18.1% (36)	27.1% (54)	199
Site defined text inserted into receipt	1.8% (3)	25.5% (42)	7.9% (13)	12.7% (21)	52.1% (86)	165
Leaflet listing matching gift programs inserted into solicitation piece	3.0% (5)	22.0% (37)	6.0% (10)	11.3% (19)	57.7% (97)	168
Leaflet listing matching gift programs inserted into receipt	2.5% (4)	14.0% (22)	3.8% (6)	7.0% (11)	72.6% (114)	157
Direct interaction with donors during phonathons	3.3% (6)	44.3% (81)	17.5% (32)	12.0% (22)	23.0% (42)	183
Information posted on your institution's web site	4.7% (9)	49.7% (96)	7.3% (14)	24.4% (47)	14.0% (27)	193
Focus groups or other networking/communication strategies with constituents in companies that have matching gift programs	3.3% (5)	7.9% (12)	4.6% (7)	6.6% (10)	77.6% (118)	152
Other	1.5% (2)	9.6% (13)	8.9% (12)	5.9% (8)	74.1% (100)	135
					<i>answered question</i>	221
					<i>skipped question</i>	222

The Matching Gift Fundraising Cycle (Continued)

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)?

	2009	2008	2007	2006
Greater than 75%	7.0%	6.4%	6.5%	12.7%
50 - 75%	12.8%	17.8%	17.9%	6.4%
25 - 49%	21.6%	26.7%	26.9%	26.8%
10 - 24%	23.3%	24.3%	23.9%	28.0%
0 - 10%	18.5%	18.3%	18.4%	16.6%
N/A	16.7%	6.4%	6.5%	9.6%

The Matching Gift Fundraising Cycle (Continued)

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

	2009	2008	2007	2006
Admission Applications or Enrollment Forms	34.3%	30.7%	Not Asked	Not Asked
Alumni directory survey	57.1%	65.6%	73.0%	59.2%
Collection of business cards at events	48.6%	47.9%	49.5%	44.0%
Individual surveys (follow up to address changes, etc.)	39.5%	44.8%	41.4%	49.7%
Professional and other specialized directories	11.0%	10.9%	13.5%	12.7%
Phonathon staff asking for employment information	60.5%	68.2%	73.9%	61.8%
Buck slips and information update cards in all publications	18.6%	18.8%	19.8%	22.3%
Advertisements in publications to collect information	12.4%	7.8%	13.5%	12.7%
Information update form or other data harvesting mechanisms on your web site	44.3%	44.3%	47.7%	40.8%
Working with your career center	11.9%	9.4%	9.0%	8.9%
Career networking within your online alumni community	22.4%	10.4%	17.1%	16.6%
Internet searches	38.1%	30.2%	33.3%	30.6%
Running your database through screening services	22.9%	24.0%	29.7%	23.6%
Other	10.0%	8.3%	14.4%	8.9%

Other answers included:

Returned solicitation pieces.

PAC donations.

We have not actively acquired employment information on donors nor have we made it a priority.

Personal visits.

We don't ask for it but our members often volunteer information.

Line on remittance envelope and/or donation card.

Our staff is too small to do any of the above. We serve five campuses!!!

Online social networking sites.

Matching reminder letters that ask for updated employment info.

Reunions.

Cross reference targeted sets of email addresses with known @.com corporate email addresses to ID place of work.

The Matching Gift Fundraising Cycle (Continued)

Luggage Tag program.

On line subscriptions.

Follow-up letters show our existing business information and we ask for updates and changes.

Asking for company name on gift reply device.

Scannable forms used for event registration.

The Matching Gift Fundraising Cycle (Continued)

5. How effective have these strategies been?

Results for 2009

	No effect	Some effect	Great effect	Uncertain	N/A	Response Count
Admission applications or enrollment forms	4.0% (7)	15.4% (27)	22.9% (40)	9.1% (16)	48.6% (85)	175
Alumni directory survey	1.6% (3)	30.1% (55)	27.9% (51)	10.4% (19)	30.1% (55)	183
Collection of business cards at events	1.7% (3)	37.0% (64)	16.2% (28)	11.6% (20)	33.5% (58)	173
Individual surveys (follow up to address changes, etc.)	2.4% (4)	29.4% (50)	17.1% (29)	8.2% (14)	42.9% (73)	170
Professional and other specialized directories	4.7% (7)	10.8% (16)	6.8% (10)	7.4% (11)	70.3% (104)	148
Phonathon staff asking for employment information	2.2% (4)	36.2% (67)	25.9% (48)	10.8% (20)	24.9% (46)	185
Buck slips and information update cards in all publications	4.0% (6)	17.3% (26)	6.7% (10)	6.0% (9)	66.0% (99)	150
Advertisements in publications to collect information	3.4% (5)	12.9% (19)	2.7% (4)	9.5% (14)	71.4% (105)	147
Online community update form or other data harvesting mechanisms on your web site	2.4% (4)	26.2% (44)	17.3% (29)	11.9% (20)	42.3% (71)	168
Working with your career center	4.6% (7)	11.2% (17)	4.6% (7)	8.6% (13)	71.1% (108)	152
Career networking within your online alumni community	5.1% (8)	18.6% (29)	4.5% (7)	10.9% (17)	60.9% (95)	156
Internet searches	3.5% (6)	32.0% (55)	9.3% (16)	9.9% (17)	45.3% (78)	172
Running your database through screening services	3.8% (6)	18.6% (29)	6.4% (10)	10.3% (16)	60.9% (95)	156
					<i>answered question</i>	209
					<i>skipped question</i>	234

The Matching Gift Fundraising Cycle (Continued)

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)

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

	2009	2008	2007	2006
Yes	7.9%	6.0%	10.9%	10.2%
No	80.6%	80.5%	78.2%	14.0%
Planning Within 1 Year	4.0%	0.5%	2.5%	0.0%
Planning 1-2 Years from Now	0.0%	0.5%	1.7%	0.0%
Planning More than 2 Years from Now	0.0%	0.0%	0.0%	0.0%
No answer/uncertain	7.5%	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?

	2009	2008	2007	2006
Yes	20.9%	22.1%	25.2%	30.6%
No	67.0%	61.3%	58.8%	58.0%
Planning Within 1 Year	4.8%	1.5%	4.2%	0.0%
Planning 1-2 Years from Now	0.9%	2.0%	1.7%	0.0%
Planning More than 2 Years from Now	0.4%	0.5%	0.8%	0.0%
No answer/uncertain	6.1%	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?

	2009	2008	2007
Monthly	2.5%	2.9%	1.3%
Quarterly	10.6%	8.1%	9.1%
Semi-Annually	6.3%	6.6%	10.4%
Annually – just before the close of the Fiscal Year	5.0%	8.8%	3.9%
Annually – just before the end of the calendar year	1.3%	2.2%	2.6%
Random – as required	56.3%	58.8%	59.7%
Other	18.1%	12.5%	13.0%

The Matching Gift Fundraising Cycle (Continued)

Other answers included:

Just exploring options.

Whenever we receive a matching gift check we evaluate open claims on the company and follow up with them when we see a discrepancy.

We will start the annually-just before the end of calendar year this June.

We do not send reminders to corporations/foundations.

Continual telephone follow-up.

No reminders sent. We contact them only if a matching gift has not been received at the anticipated time frame.

We do not send reminders to corporations/foundations for matching gifts. We only contact them if a matching gift has not shown up within the anticipated time frame.

We don't send reminders to corporations/foundations.

Working to establish this reminder process.

We do not remind organizations for matching gifts. We record them as we receive them and contact only about requests pending a long time.

We phone or email periodically.

Contact is made according to the program's payout schedule.

Do not send reminders. We record matching gifts as we receive them based on the organizations' schedule.

Doesn't apply this year, this is a learning year

We send reminders according to company's matching gift schedule.

Never needed to.

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?

	2009	2008	2007
Monthly	16.8%	15.2%	12.4%
Quarterly	7.2%	15.9%	13.5%
Semi-Annually	1.2%	2.8%	1.1%
Annually – just before the close of the Fiscal Year	3.0%	3.4%	2.2%
Annually – just before the end of the calendar year	1.2%	1.4%	1.1%
Random – as required	56.3%	46.9%	44.9%
Other	14.4%	14.5%	24.7%

Other answers included:

Just exploring options.

A week after a gift is made.

We send employees at our corporate agent companies letters twice a year. Those who do not work for a corporate agent company receive a letter from the Director of our Matching Gifts Program at the beginning of the following month. We do not strategically follow up with the donor after that letter.

We will start the annually-just before the end of calendar year this June.

With pledge payment reminders, with gift receipt letters and thank you calls.

We have nothing in place for this currently, but should have this up and going within one year.

Working to establish this reminder process.

As time allows - immediate response after receiving their gift; then a follow up letter hopefully within 6 months. Without - it falls to me or a work study student - we do not have a person who is dedicated to matching gifts only.

Same day we get the gift, and then 3 weeks later.

60 days from gift date.

As gift is received.

When donation is received without the form.

Monthly, for the previous month. If no response, then quarterly. If still no response, semi-annually, then annually, depending on program deadline to apply.

We do 2 weeks after the gift and then one reminder quarterly.

Weekly

Stewardship

1. Where matching program parameters allow it, do you offer donors recognition in gift clubs/societies for the matching gifts they direct to your institution?

	2009	2008	2007	2006
Yes	66.7%	72.4%	71.7%	74.5%
No	24.3%	21.6%	18.3%	13.4%
Planning Within 1 Year	2.7%	0.5%	0.0%	0.0%
Planning 1-2 Years from Now	0.0%	0.5%	0.0%	0.0%
Planning More than 2 Years from Now	0.0%	0.0%	0.0%	0.0%
No answer/uncertain	6.3%	5.0%	10.0%	12.1%

Other answers included:

We are evaluating this policy further now as well as gifts solicited by parents among relatives. Our development very decentralized; many areas have area-specific clubs/societies/honor rolls, with no across-the-board standard for treatment of matching gifts.

2. If your response to question 1 was yes, at what point do you incorporate matching gifts when recognizing individual donors in giving societies/honor rolls? (New question for 2009 survey)

	2009
Known matching gift program affiliation but no confirmed current FY match request.	6.5%
Known matching gift program affiliation and confirmed current FY match request.	37.3%
Known matching gift program and confirmed current FY match payment.	52.9%
Other	3.3%

Other answers included:

When the donor requests joining the giving society.
Usually we only included matches paid, although we review matches due for those that we know we will get and sometimes include them.
We recognize the gift and the match together for giving level recognition.

Stewardship (Continued)

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

	2009	2008
Yes	52.3%	51.0%
No	34.1%	38.4%
Planning Within 1 Year	6.8%	4.5%
Planning 1-2 Years from Now	0.9%	1.5%
Planning More than 2 Years from Now	0.0%	0.0%
No answer/uncertain	5.9%	4.5%

Other answers included:

We acknowledge matching gift with donor's original gift.
 A postcard is sent when we receive their matching form thanking them for instituting the match, and once the match money comes in, a hand addressed (salutation, signature and envelope) thank you note is sent
 If requested by the donor; otherwise no.
 We've gone back and forth on this, but have so few matching gifts that generally we do send a letter to the donor.
 If it is over a certain amount, we send a letter.
 Email only to those with known email.

Stewardship (Continued)

3a. Do you include matching gifts when calculating corporate recognition donor honor rolls/recognition for philanthropy? (New question for 2008 survey, not included in the 2009 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%

Stewardship (Continued)

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

Listed donors under the matching gift company as the matchers
Completing the hard copy form for the donor and starting peer to peer asks where we have multiple alums working at one company
Personal follow-up by email, as soon as an eligible gift/pledge payment comes in.
Class agents or current family solicitors reminding specific groups or individuals
Still in beginning stages. The limited experience I have had is sending the leaflet with the tax receipt as donors have already given and have been more likely to take the time to look at the matching gift brochure after the fact.
Notifying faculties when their alumni have made a matching gift; they then follow-up with the appropriate stewardship for those donors.
Logging constituents that we've not received matching gift forms and contacting them
Individual donor contact. Business cards turned into luggage tags.
I like the corporate agent idea and used this practice at other institutions.
Having the application processed over the Internet which saves time and paper
Direct contact by College Development Directors.
Personal ask based on knowledge of employment.
Recognition letters/reminders/impact letters.
We have provided a searchable database to our fundraisers for every state where they have events and it included any matching gift company that we knew or suspected to match our organization along with the city and state in which that company resides. Both local company name and ultimate parent corp name were provided.
The post it notes have been well received.
Teaching the donors and working with some of the corporations.
Direct "thank you" or acknowledgement to the donor. Many donors very much enjoy the recognition they receive on a personal level, rather than in a listing.
The letter produced from the HEP Matching Gift Program
Presenting the constituent with the unknown information of their employer matching and getting a donation based on that new found information.
Sending pre-populated buckslips in all of our mail appeals has prompted many people to fill out their information for us.
Sending e-mails to donors thanking them for the application, letting them know how important they are to my program, and that I will notify them when the corp. match is received.
Testimonials from parents who have had their employer match a gift encouraging other parents to do the same, reminding them how easy it is.
Email is becoming bigger and donors are more responsive especially if we can email a form or if they can email a form.
Logging constituents that we've not received matching gifts forms and contacting them periodically.
God gift.
At the beginning of our Annual Giving Campaign this past Fall, I directly called current/former families to let them know their employers match gifts. I followed up by email with a link to the forms and information. When our matching gift opportunity came through, I was ready and included a reminder and form with the thank you letter, which the donor completed and returned in the SASE.

Stewardship (Continued)

Soft credit for honor rolls.

Donors appreciate being reminded of their matching gift potential and also appreciate receiving notification when the match arrives.

Donor acknowledgements of matching received.

Private Matching Challenges

This was a new section for 2009.

1. Have you attempted to recommend or otherwise initiate a private matching challenge with any of your constituencies?

	2009
Yes	39.5%
No	60.5%

2. In how many private matching challenge programs do you anticipate participating in this fiscal year?

	2009
0	53.0%
1-3	44.3%
4-9	1.1%
10 or More	1.6%
Other	Specify

Other answers included:

Last one was in 2007.

We have done this with Microsoft and Washington Mutual once or twice each, ever.

We may not do it this year, but we may do so in our upcoming capital campaign.

We are a radio station and do on-air challenges from companies but it isn't necessarily for Matching Gifts.

Private Matching Challenges (Continued)

3. What constituent type has most often offered or agreed to sponsor a private matching challenge appeal to other donors?

	2009
Individual	72.3%
Corporation	21.0%
Foundation	28.6%
Other	Specify

Other answers included:

Board of Trustees/

We had a \$500,000 matching challenge grant in 2008 towards our Building Campaign project.

Very effective!

Private Foundations

Organization.

For University Faculty & Staff Campaign only.

At this institution it was individual. At another institution at which I worked, it was a foundation.

PTF Auxiliary Organization at the school

Private Matching Challenges (Continued)

4. What is the most common focus or purpose of the matching program?

	2009
Collections/Exhibitions	5.3%
Community Outreach/Public Programs	10.6%
Endowment	31.9%
Facilities	18.6%
Faculty/Staff Campaign	5.3%
Free Health Clinic Services	1.8%
New Contributions	41.6%
Student Aid - Graduate	8.8%
Student Aid - Undergraduate	34.5%
Other	Specify

Other answers included:

Parent participation.

We do not have a goal for matching gifts because it is the policy of our organization and most companies that the match money follows the original donation.

Increase giving from new and returning donors.

New or increased giving.

We don't have a specific drive in place right now.

Patient Assistance

Unrestricted. (6)

No specific goal or purpose - money raised is usually unrestricted

Not sure if this is the right section for this answer, but we participate in the IBM Matching Grants program, which is coordinated by a past parent. The program allows constituents to pool their donations to provide laptops to our school.

Annual Fund. (9)

Increased contributions

Professorships

Capital Renovations.

It boosts the Annual Fund goal for the school.

New contributions, increased contributions, class % of participation, and recent grad/class giving

General Operating Support

Student Aid – Secondary

Private Matching Challenges (Continued)

At present, it's directed to the same area the donor chose.

All cash contributions

Elementary School Tuition Assistance.

We are a K-6 elementary school, so anything tied to operating would be attractive: financial aid/scholarships, visual & performing arts, science & technology, community service

Student Aid High School

5. What private matching challenge ratios have you been offered?

	2009
3:1	12.8%
2:1	28.2%
1:1	88.9%
.5:1	8.5%
Other	Specify

Other answers included:

A lump sum for achieving a certain level of participation.

1:1 within certain dollar amounts, at least \$1,000 to \$5,000 up to \$50,000.

.25:1

1:5 not to exceed \$1,000,000 (we had \$6,000,000 left to raise to meet our campaign goal and a donor offered the matching challenge).

At another institution at which I worked, we got a 4:1 match for gifts of most recent five graduating classes; and a flat \$5,000 per graduating class with 50% of its members contributing during the year.

If you raise x amount, we will give y amount.

Increased maximums or maximums waived

Private Matching Challenges (Continued)

6. How much of your total funds has come from private matching challenges?

	2009
\$ 1Million or More	11.0%
\$250,000 - \$999,999	8.3%
\$50,000 - \$249,999	10.3%
\$5,000 - \$49,999	17.2%
\$0 - \$4,999	14.5%
Uncertain	38.6%

7. Any additional comments on private matching challenges?

Private matching challenges are overseen by the Annual Fund, but not through Matching Gifts. Our Matching Gifts Program focuses specifically on employee directed matching gifts. Private matching challenges have worked well for us. Am only familiar with one matching challenge. I would love to learn more about the different techniques and success stories here! Also what corporations have done them and for what type of non-profit org. That would be fabulous! Typically these are most helpful to us during an alumni reunion year. More foundations need to be approached to consider this vs. a flat grant.

Government Matching Fund Programs

This was a new section for 2009.

1. Have you attempted to recommend or otherwise initiate a government matching program with any of your constituencies?

	2009
Yes	5.8%
No	94.2%

2. In how many private matching challenge programs do you anticipate participating in this fiscal year?

	2009
0	92.8%
1-3	5.9%
4-9	0.7%
10 or More	0.7%
Other	Specify

Other answers included:

NA or Unknown.

Government Matching Fund Programs (Continued)

3. What type of government entity has most often offered or agreed to sponsor a matching program?

	2009
Local/Regional	41.2%
State/Provincial	35.3%
National/Federal	35.3%
Other	Specify

Other answers included”

Not applicable.

4. What is the most common focus or purpose of the matching program?

	2009
Collections/Exhibitions	11.8%
Community Outreach/Public Programs	20.6%
Endowment	29.4%
Facilities	17.6%
Faculty/Staff Campaign	8.8%
Free Health Clinic Services	5.9%
New Contributions	50.0%
Student Aid - Graduate	8.8%
Student Aid - Undergraduate	32.4%
Other	Specify

Government Matching Fund Programs (Continued)

Other answers included:

Uncertain
Student Aid - Secondary
Upgrades

Government Matching Fund Programs (Continued)

5. What government matching fund ratios have you been offered?

	2009
3:1	18.5%
2:1	25.9%
1:1	77.8%
.5:1	14.8%
Other	Specify

Other answers included:

Not applicable.

6. How much of your total funds has come from government matching fund programs?

	2009
\$ 1Million or More	6.1%
\$250,000 - \$999,999	3.0%
\$50,000 - \$249,999	1.5%
\$5,000 - \$49,999	7.6%
\$0 - \$4,999	34.8%
Uncertain	47.0%

7. Any additional comments on government matching fund programs?

Institution is not allowed to accept government money, except for financial aid

New Strategies for Matching Gifts

This was a new section for the 2009 survey.

1. Based on the current economic conditions, what are you doing differently to help raise more matching gifts?

Tracking donors whose gifts have been matched in the past to make sure they request the match again.

More personalized target contact with alumni and prospective donors.

Trying more peer to peer asks.

Communicating with donors prior to potential donation being given.

We are allocating more personnel to our matching gift efforts.

Developing closer relationships with matching gift companies and acknowledging the donors for their matching gifts.

Nothing - all but one of our officers is brand new to not only the college but to fundraising all

Together - we are teaching them the basics and then will get more into this.

When we have a heads up that a company is going to suspend its program, we send a letter to those employees we have on record to inform them of the deadlines and process they would need to complete in order to take advantage of the program one last time. Our letters reference the economy and how their gifts and matches are needed now more than ever in order to support our students' growing need for financial aid right now.

Collecting employment info and sending forms or directing donors to the matching gift info.

Matching gifts are a current area of focus for increase, as our main matching gift corporations have not curtailed these programs.

Increasing the prominence of the matching gift search website on our main website.

Matching dollars and matching ratios are likely to be fewer next year and as a result, we'll ask more supporters for matching gifts.

Closer follow-up with donors who have matching potentials and better tracking/follow-up on matching gifts that have not been received.

Mention match possibilities in all solicitations and drive to web site where also available.

More personal follow-up! Reviewing each gift that is eligible.

Nothing substantive. Stressing phonathon callers make sure to ask.

We are not focusing on matching gifts. We include matching gift information in our materials, and solicit corporations to become corporate members in addition to other funding opportunities.

Increased focus on promoting matching gift through website, possibly telemarketing as well as direct mail.

Nothing thus far.

Nothing.

Will attempt to clean up database to ensure our alumni - matching company relationships are valid.

The same, we do not pursue them.

Nothing.

Identify more organizations who match gifts and their relationship to our individual donors.

Raise awareness and encourage donors to check with their Human Resources department for matching gift possibilities.

Increasing efforts to identify potential matching gift sources.

Nothing.

New Strategies for Matching Gifts (Continued)

Cultivating Private (Individual Matching Gift Opportunities).

Not at the moment.

Not currently engaged in a proactive strategy to raise more matching gifts. Business as usual.

Added matching gift website & added matching gift parameter to phonathon.

Nothing.

Watching constituents that haven't sent in their forms closer.

More emphasis in our Call Center.

Not in our strategy.

Nothing different.

Nothing.

Trying to offer more to get new donors and to get upgrades.

1. Postcard to donors requesting Matching Gift Form. 2. Thank you card to donors when matching gift form is received and processed (online or paper) 3. Thank you post card to donors when their employer matches their initial gift.

More Follow up.

We actively pursue all individuals who make a gift and who have a matching gift potential.

Just trying to raise more awareness, but finding corporations ending or postponing programs.

Trying to have someone in charge of the program besides the gift processor.

We are aware of the need to pursue matching gifts further; however staff time continues to be the challenge.

Speaking with donors and actively soliciting donations. Following up with matching gift companies on outstanding gifts

Cleaning up our employment records.

Starting a gift program.

Making an increased effort to contact those who have decreased giving over last year and let them know that matching gifts can help maintain the donor at the same donor recognition level.

We are continuing to work with donors that have a history of sending in matching gifts.

Personally reaching out to more donors and prospects.

Postcard sent monthly to donors who have not submitted a matching gift form Postcard sent to donors who submitted a form thanking them for the matching gift form. Postcard sent to donors thanking them when their company matches their gift

More consistent follow up with individual donors and corporations. Providing donors with proper forms if available.

Need to do more mentions in our newsletter.

Just putting out the Matching gift inserts in hopes that the applications will come in.

We are reexamining our program and will begin a matching gift reminder process.

Nothing.

Promote it on our website and in our materials.

Promote through Direct Mail and Phone Program.

Highlighting the opportunity more often in free emailed publications.

Started an audit of outstanding matching gifts to ensure that they are matched.

Our current way of doing things was just "if they have a matching gift company then they send in the paperwork"; there has not been a program in place; that is one of my goals this year; to actually start a program.

More personal contacts.

New Strategies for Matching Gifts (Continued)

More conversations with corporations - because our organization is religious-affiliated it often disqualifies us for matching funds - but we have restricted funds that are used completely for non-religious affiliated ministry.

Push for them early in semester.

In the past we waited for parents or alumni to deliver a matching gift. I am trying to be more proactive, seeking information about known matching companies and reaching out to families through our school newsletter. If the economy were better, I would call parents, but we know some are unsure of whether they will have jobs soon, much less be able to seek a match.

Soft asks.

Nothing.

Nothing yet.

Getting more college development officers in contact with their donors.

signed on with HEP; sending matching gift forms with the receipts instead of relying on constituents to get from their employer.

Reaching out to more donors.

Increasing the number of asks.

Starting a real Development Office.

Focusing more on donor follow up to collect more currently eligible dollars.

More face to face conversations with donors about the importance of Matching gifts.

As field staff is out trying harder for \$ from alumni their focus on the "peripheral" mg \$ has slid.

The person whose focus has been on MG corporate partner program has renewed focus on alumni only.

Promoting option more.

Looking at the cost of instituting a richer matching gift program, eg. inserts

Nothing - my sense is that this is a dying program. We now receive less than \$600K in matching \$ on more than \$50 M of gift revenue. Many companies are cutting these programs.

Make information more available and accessible in solicitations.

Nothing at this time.

Continue to promote with each scheduled ask for our annual giving program.

This is an area currently under discussion - in the very early stages.

Getting more employment information via our alumni directory project.

When our online giving site is used to make a donation, our website send out reminders to people who work for a matching company asking them to participate.

Officers making direct contact to follow up on missing forms and update employment info.

Consistent reinforcement of messaging - 'there are dollars left on the table' when our students need assistance more than ever.

Nothing at present. Results have not been swayed to date.

Concentrating on building relationships with our key partners so that we will be informed if a change is being discussed. Looking for other companies that have a program that we do not have a relationship with and starting to build one now.

Nothing.

Keeping on top of those that we know we have. Pro-actively pursuing what we know we have.

Sending matching forms with receipts.

Increased visibility in website; potentially promoting program through other mediums.

Nothing.

Corporate liaison programs.

New Strategies for Matching Gifts (Continued)

Still continuing to highly encourage donors to give through a matching gift.

Increasing awareness to donors in solicitations.

Nothing at this time.

Better awareness Better tracking.

We are spending our energy searching for money in other areas to make up for what we know we will likely lose in MGs. For those companies that still have MGs we have been encouraging our constituents to get their gifts in to us as soon as possible to avoid losing a match should their company decide to discontinue their program.

In progress.

Using HEPs employment scanning software to do a follow-up mailing.

Nothing.

More peer to peer contact via letters/phone calls. More individual and directed solicits.

Thinking of more ways to promote it.

Calling donors and prospective donors to remind them that they work for companies that match their gifts.

More personalized solicitations.

Working more closely with our student telemarketing program, college fundraisers, and alumni association. Also launching a corp. agent program.

Nothing.

Uncertain; we hear many companies are cancelling matching retirement contributions, so assume they would also cancel matching gifts.

Nothing.

Increasing frequency of mailing matching gift forms.

Watching who's not sent in their forms closer and keeping track of cut off dates.

I'm already doing something different than what was done before as I am the first dedicated professional fundraiser on staff; no one ever promoted the opportunity before. I have been stressing that it is an easy way to maintain one's giving in a down economy.

Verifying more employment information, keeping updated on matching gift companies.

Continuing to communicate matching gift opportunities which include the establishment for new employer matching gift programs.

Reaching out to individual donors for opportunities to match constituency giving.

Not doing anything right now, but planning to include matching list of companies as a buck slip with gift receipts.

Nothing new

Nothing right now.

The corp/fnd. staff are working directly with the companies.

Contacting donors on a more regular basis.

Increase reminders in appeals, both written and phonathon; adding reminders on pledge receipts.

Nothing as of yet.

Promoting the idea that donors can leverage their gift during this difficult period.

If I had time, I would look into where our constituents work and send quarterly reminder letters to all matching gift companies. Most recently we only send to 4 of our biggest employers. At this time 3 of them have dropped their matching gift programs.

Increased promotion to our constituents and increased focus on those companies with lucrative match programs.

New Strategies for Matching Gifts (Continued)

2. Based on what appears to be an increasing number in cancellations of matching gift programs, are you doing anything differently to either compensate for reductions in revenue or to encourage organizations to continue their programs?

Most of the answers to this were no or nothing.

We are contacting our corporate sponsors and encouraging them to keep their matching gift programs.

Asking more organizations and individuals for continued support at lower levels in the past, spreading support out over multiple years.

We are still advertising the program, so that when the economy picks up, we are ready and our constituents are educated.

It is not a significant source of our revenue.

Continuing to remind people of the importance of the program and allowing them to be our advocate in the corporation.

Just remind them that this will pass, and when it does the organization will turn around and match once more.

Staying in touch with our best friends, sharing what has been going on with us regarding achieving our mission - telling the story.

Not doing anything differently because we receive few matches to begin with and so far we have not experienced an impact with those regular matching donor relationships

Because at this institution we have relatively few who work for companies with corporate matches, the cancellations of and reductions in corporate matches will not result in a great revenue reduction for us.

Writing more grant proposals to foundations.

We're discussing how we'll retain donors at our higher level recognition programs where their projected match help them achieve membership and now that match is lost. Offering to keep them for 3 years as long as they increase their own giving in each year such that in 3 years they're making up the lost portion of the match is a possibility that seems to be gaining headway.

We have yet to receive a cancellation of a matching gift.

When cancellations happen, we overbuild in that area to compensate for the lost revenue.

Corporate liaison programs.

Not sure yet - I don't know if it was a big enough source of revenue to warrant compensations.

Making donors aware of the loss of this valuable resource and asking them to consider taking up the slack and or developing matches/challenges of their own.

Reviewing & modifying procedures and policies to make them more effective, and putting more emphasis on marketing matching to on & off campus constituents. Educating & marketing has been an effective approach.

Little to no impact on our revenue (insignificant).

Researching various issues.

Follow up communication by phone or letter.

Your Organization

1. Institution supported is:

	2009	2008	2007	2006
Private	69.5%	61.7%	54.8%	59.0%
Public	29.9%	36.3%	43.5%	34.0%
Uncertain	0.6%	2.1%	1.7%	7.0%

2. Type of organization (Format of question changed in 2009):

Type of Organization	2009	2008	2007	2006
Academic- Elementary/Secondary Education	15.7%	12.6%	7.8%	9.0%
Academic - Post-secondary Education	56.2%	62.9%	69.6%	74.0%
Academic - Other Research	3.2%	3.1%	6.1%	3.0%
Animal Welfare	0.0%	Not a Choice	Not a Choice	Not a Choice
Aquarium/Zoo	.5%	Not a Choice	Not a Choice	Not a Choice
Aquarium/Zoo/Botanical Garden	Not a Choice	1.0%	1.7%	1.0%
Environment	.5%	Not a Choice	Not a Choice	Not a Choice
Fine Arts/Performing Arts Organization	.5%	Not a Choice	Not a Choice	Not a Choice
Global/National/Local Community Service	Not a Choice	1.5%	1.7%	1.0%
Healthcare/Hospital/Medical Center	5.9%	Not a Choice	Not a Choice	Not a Choice
Hospital/Clinic	Not a Choice	1.5%	0.0%	0.0%
Other Healthcare	Not a Choice	1.0%	2.6%	3.0%
Museum - Art/History/Cultural	1.1%	Not a Choice	Not a Choice	Not a Choice
Museum - Art or History	Not a Choice	0.0%	1.7%	1.0%
Museum - Other	0.0%	0.5%	0.9%	0.0%

Type of Organization	2009	2008	2007	2006
Performing Arts Organization	.5%	1.0%	0.0%	1.0%
Public Broadcasting	.5%	Not a Choice	Not a Choice	Not a Choice
Religious	2.2%	Not a Choice	Not a Choice	Not a Choice
Science/Technology Museum	1.1%	1.5%	0.9%	0.0%
Social Service/Relief/Aid	3.8%	Not a Choice	Not a Choice	Not a Choice
Other	8.6%	12.9%	7.0%	7.0%

Other answers included:

State related, private by charter but receive some state funds.
 Mercy corps receives both public and private support.
 National membership association.
 Non-profit. (2)
 Charitable arm of a membership organization
 501 (c)3

3. Number of Advancement/Development staff in your organization:

This was a new question for 2009.

	2009 Total	2009 Head Office	2009 Field Branch
Average	18.76	18.76	5.19
Maximum	79.0	79.0	.75
Minimum	1.0	1.0	1.0

Your Database and Fundraising Software

1. Number of constituent records in your database:

Total

	2009	2008	2007	2006
Average	157,552	132,744	123,433	149,013
Maximum	5,000,000	1,167,000	750,000	3,000,000
Minimum	1	228	100	0
Standard Deviation	638,808	189,484	147,993	288,323
1st Quartile	13,500	23,000	25,750	26,006
2nd Quartile	33,500	52,000	67,500	69,500
3rd Quartile	125,000	153,583	143,250	188,443

Active (Added in 2009)

	2009	2008	2007	2006
Average	100,527			
Maximum	2,000,000			
Minimum	1			
Standard Deviation	291,857			
1st Quartile	9,372			
2nd Quartile	26,961			
3rd Quartile	79,000			

Your Database and Fundraising Software (Continued)

Deceased (Added in 2009)

	2009	2008	2007	2006
Average	50,481			
Maximum	300,000			
Minimum	1			
Standard Deviation	405,598			
1st Quartile	1,500			
2nd Quartile	6,000			
3rd Quartile	23,000			

Your Database and Fundraising Software (Continued)

2. Your fundraising/development/advancement software:

Question was changed in 2009 to allow more granular choices.

	2009	2008	2007	2006
Agilon - Ascend	0.0%			
Agilon - ONE	.5%			
Blackbaud - Enterprise CRM	.5%			
Blackbaud - eTapestru	2.2%			
Blackbaud - Raiser's Edge	32.4%	33.3%	27.5%	25.0%
Blackbaud - Team Approach	1.6%			
Datatel		6.2%	11.0%	8.0%
Datatel - Benefactor	3.8%			
Datatel - Colleague	1.6%			
DonorPerfect	2.7%			
In-House, Custom or Home Grown	3.3%			
Oracle - Contributor Relations	1.1%			
Sage - Fundraising 50	.5%			
Sage - Millennium	6.6%	10.2%	13.8%	8.0%
SunGard Advance C/S	8.2%	12.4%	13.8%	19.0%
SunGard Advance Web	3.3%			
SunGard Banner	15.9%	14.7%	17.4%	15.0%
Other	15.4%	23.2%	16.5%	25.0%

Your Database and Fundraising Software (Continued)

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

TLC, Auctionpay, athon
Jenzebar (8)
Serensoft
Results Plus (3), Blackbaud - WealthPoint
EdTrac
SunGard PowerCAMPUS
Donor2 (3)
GiftMakerPro
Acquiring GiftWorks
Campus Cornerstone
Telosa/Exceed
Viking
Senior Systems
Siebel

Comments on Survey

1. What do you feel will be the most useful information from this survey?

New question for 2009.

Learning of best practices.

Trend Data for Matching Programs.

How much other institution's matching gift revenue has increased/decreased in this economy.

What resources other institutions are utilizing to capture more matching gifts.

% change in programs. how many schools have corporate agent programs. what schools are doing in response to the economy. how often schools follow up with donors to get their gifts matched.

knowing what other colleges are using (materials, vendors) to help promote their matching gift programs.

Trend data and information about plans to compensate for reductions anticipated.

What other software and tools are used.

How to inform constituents of matching gift companies.

What other schools are doing.

The number of organizations that see measurable results utilizing a matching gift vendor; number of organizations that rely on matching gifts to meet yearly revenue goals.

Benchmarking to see what processes others use and their rate of success.

Techniques for soliciting more gifts.

It will be nice to know, but it won't make any difference to how we do business.

Ideas for boosting matching our matching gift program and most effective.

Any new and inventive ways of encouraging constituents to take advantage of matching gift programs. (Sec. 9 #1)

Trends & Ideas.

Value of matching gift program promotional material most used follow up strategies

If you share the results.

How many companies are establishing, sustaining or eliminating their matching gift programs?

What products work best for other institutions.

How to increase our matching gift program.

Unsure.

Ways that others are compensating the reduction in revenue due to companies discontinuing the program.

How to find ways of finding other Organizations that match.

Stats increase or decrease in matching gift revenues.

Since I am trying to start up a program, any and all of this info will be helpful comparative.

Ways to increase Matching Gifts.

New ideas.

Information about the impact the economy is having on matching gifts.

Vendor services

How to increase matching gifts. Whether other independent schools obtain government gifts.

We are just starting our matching gifts program, so seeing what other non-profits utilize and what works for them will be helpful.

What others are using to get matching gifts.

Comments on Survey (Continued)

Learning how to get more employment information.

Find out what type of program is working for others, dollars raised by others, percentage of business information available.

Sorry - but none. It only confirms my belief that MG are a dying piece of what we do..

New ideas to increase matching gifts in the current economy.

Unknown,

I would be interested to see what other schools are doing. I am unable to attend any conferences this year due to budgetary restraints - so I would appreciate seeing the results to share with our team.

Stats and personal statements, please keep me posted.

Seeing how we compare to other schools and learning what they are doing that's working.

What other institutions are doing?

Trends on matching gift dollars received. What means are institutions using to create matching gifts.

What others are doing to increase MG revenue.

Idea sharing of effective approaches and new initiatives to address economic downturn and impact.

How people are increasing gifts and if challenges work.

How other schools/organizations leverage matching gifts.

How institutions have changed doing business in this economic climate.

New ideas presented in questions.

Other people's process to increase matching dollars.

New ideas.

The opportunity to benchmark our status with other similar organizations; and strategies for increasing matching gifts.

Learning what other institutions are doing.

How nonprofits are coping with reductions and suspensions of matching gift programs. How small organizations with little or no budgets and staff promote matching gifts.

Finding out how many schools match athletic gifts.

To learn if there are any trends of which we should be concerned.

Ideas for how to raise more matching funds in this economy.

Ideas or inexpensive vendor services to help small non-profits.

Comments on Survey (Continued)

2. What do you feel will be the least useful information from this survey?

New question for 2009.

Type of software used

Private match programs.

What divisions get credit for the matching money raised.

Ways others are recognizing their donors.

Nothing, because anything you provide will be helpful to me as a new person to Matching gifts.

Government Matching Programs (8)

(Note that when we put the survey together, we also felt that this would be the least useful question for the majority of respondents but for some areas such as the UK and Canada, there are a number of these programs.)

Redundant statistics

This survey required too many facts to be quick -- too many reports to run to give accurate information.

I am only on this job for less than two years - I am still learning... therefore right now - it's all fairly useful!

New product information, as we need to cut our expenses.

Not sure. Everything may be helpful information for benchmarking our success with matching gifts.

A lot of stats from organizations much larger than ours.

These surveys seem to have more benefit for larger, more established institutions. Ours is 60 years old, only 30,000 alumni

Constituent record information

Comments on Survey (Continued)

3. 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?

I think your results will be biased. Those organizations that don't participate in Matching Gifts won't participate in the survey. For example, since my organization doesn't do Matching Gifts I hadn't planned on participating in the survey. However, Matching Gifts came up in conversation yesterday and I thought I'd be a voice for those who have no Matching Gifts program.

This survey is rather long and focused on education rather than the whole not for profit sector. There is a glitch in your survey when you ask for number of employees, as it would not let me continue until I erased all numbers regarding number of employees.

Questions on actual programs/campaigns people are running currently and how often. For instance the question on phonathon, but how? when? frequency? etc.

Make the headers clearer so you don't have to read the entire page if the first question doesn't apply. The survey took too long to complete.

What's the benefit? Why not get MG info from CAE?

Before agreeing to take the survey, announce what numbers you will need.

Total number of matches. I find it as important to know how many matches I am getting as well as the total dollar.

Budget info, and ROI.

Can we buy post-it notes in smaller quantities or for less?

4. Are there any other surveys you would like us to do?

Gift Processing Survey Reporting survey

Annual Giving

Parent letters at graduation time, graduating seniors gift fund info

Continuous Giving

Survey on running capital, endowment, and annual giving campaigns simultaneously.

I'd rather participate in a survey on pledges. Size, duration, types, fulfillment rates, more useful data!

Best practices white sheets for email newsletters

Yes, strategies for engaging young alumni from private secondary education to support the annual fund.

Structures of Institutional Advancement Department, specifically how Advancement Services areas are structured/organized to support the department.

Compensation; our university tends to focus on CUPA stats, and there is no comparable category for advancement services.