

Matching Gifts Best Practices

1. Do you accept matching gifts?

Welcome to the third annual survey on Matching Gifts Practices. The feedback from previous surveys has been very good and now we're once more asking for your input.

We've revised and upgraded the survey to allow a greater depth and breadth of details for analysis. We'll be comparing and contrasting the information to previous surveys with the intent of providing ideas on how we can all make our matching gifts practices more effective. It should take less than 10 minutes of your time, so please consider sharing your information.

The results will be presented in various forums and also published on SupportingAdvancement.com.

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

Please choose only one of the following:

Yes

No

Uncertain

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2. Your Matching Gifts Program

* 1. Do you have a defined “matching gifts program” through which you actively solicit your donors to request matching gifts? Please choose only one of the following:

- Yes
- No
- Planning within 1 year
- Planning 1-2 years from now
- Planning more than 2 years from now
- Uncertain

* 2. Which of your advancement divisions is responsible for enhancing and improving the matching gift revenue stream? Please choose all that apply:

- Advancement Services
- Annual Giving
- Corporate Foundation Relations
- Membership
- Other (please specify)

* 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.) Please choose all that apply:

- Advancement Services
- Annual Giving
- Corporate Foundation Relations
- Membership
- Other (please specify)

4. How many total equivalent FTE positions do you have dedicated to your matching gift efforts? Please use decimal number (ex. .25, .50, 1.75):

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3. Your Matching Gift Revenues

★ 1. How much matching gift income did you record last year (estimate)? Please choose only one of the following:

- \$10,000,000 or more
- \$2,500,000 - \$9,999,999
- \$1,000,000 - \$2,499,999
- \$250,000 - \$999,999
- \$50,000 - \$249,999
- \$20,000 - \$49,999
- \$19,999 or less
- N/A

★ 2. How much potential matching gift income did you write off last year (estimate)? Please choose only one of the following:

- \$1 Million or more
- \$250,000 - \$999,999
- \$50,000 - \$249,999
- \$5,000 - \$49,999
- \$0 - \$4,999
- N/A

★ 3. What was your total gift revenue for last year (estimate)? Please choose only one of the following:

- \$50 Million or more
- \$10,000,000 - \$49,999,999
- \$2,500,000 - \$9,999,999
- \$1,000,000 - \$2,499,999
- \$250,000 - \$999,999
- \$50,000 - \$249,999
- \$49,999 or less
- N/A

★ 4. What percent of your total gift revenue came from matching gifts? Please choose only one of the following:

- N/A
- less than 10%
- 10-20%
- 21-25%
- 26-30%
- 30-39%
- 40% or more

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

- Increase 100% or more
- Increase 50 – 99%
- Increase 26-50%
- Increase 0-25%
- No Change
- Decrease 0-25%
- Decrease 26-50%
- Decrease 50 – 99%
- Decrease 100% or more
- Uncertain

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4. Our Vendors and Partners

Note that a number of these questions will be optional depending on whether or not you are utilizing a vendor for matching gift services and products.

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

- Yes
- No
- Planning within 1 year
- Planning 1-2 years from now
- Planning more than 2 years from now
- Uncertain

2. Which vendors have you used for matching gift products or services? Please choose all that apply:

- Blackbaud Matchfinder
- SAGE Millennium GM
- CASE Matching Gift Clearinghouse
- HEP Giftplus
- HEP/CASE Matching Gift Network
- Other Vendor

3. What vendor matching gift products or services have you used? Please choose all that apply:

- Inserts - standard or customized to your organization
- Online search linked through your organization's web site
- Hard copy directory
- Post-its
- Employment data screening
- Other matching gift products (please specify)

If you have used vendor matching gift products or services, how much have your matching gift revenues changed for each one of the products used?

4. Inserts – standard or customized to your organization

- Increase 100% or more
- Increase 50 – 99%
- Increase 26-50%
- Increase 10-25%
- Increase Less than 10%
- No Change
- Decrease Less than 10%
- Decrease 10-25%
- Decrease 26-50%
- Decrease 50 – 99%
- Decrease 100% or more
- Uncertain

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5. Online search linked through your organization's website

- jn Increase 100% or more
- jn Increase 50 – 99%
- jn Increase 26-50%
- jn Increase 10-25%
- jn Increase Less than 10%
- jn No Change
- jn Decrease Less than 10%
- jn Decrease 10-25%
- jn Decrease 26-50%
- jn Decrease 50 – 99%
- jn Decrease 100% or more
- jn Uncertain

6. Hard copy directory

- jn Increase 100% or more
- jn Increase 50 – 99%
- jn Increase 26-50%
- jn Increase 10-25%
- jn Increase Less than 10%
- jn No Change
- jn Decrease Less than 10%
- jn Decrease 10-25%
- jn Decrease 26-50%
- jn Decrease 50 – 99%
- jn Decrease 100% or more
- jn Uncertain

7. Post-its

- jn Increase 100% or more
- jn Increase 50 – 99%
- jn Increase 26-50%
- jn Increase 10-25%
- jn Increase Less than 10%
- jn No Change
- jn Decrease Less than 10%
- jn Decrease 10-25%
- jn Decrease 26-50%
- jn Decrease 50 – 99%
- jn Decrease 100% or more
- jn Uncertain

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8. Employment data screening

- Increase 100% or more
- Increase 50 – 99%
- Increase 26-50%
- Increase 10-25%
- Increase Less than 10%
- No Change
- Decrease Less than 10%
- Decrease 10-25%
- Decrease 26-50%
- Decrease 50 – 99%
- Decrease 100% or more
- Uncertain

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

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

- Yes No Uncertain

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

12. If you do not use, or have discontinued the use of vendor supplied matching gift products or services, what is the reason? Please choose all that apply:

- Too expensive
- Ineffective
- No real return on investment
- Donors asked not to receive inserts or other materials
- Can do in house more effectively
- Unsure of potential benefits
- Other reasons you do not use, or have discontinued use

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

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5. The Matching Gift Fundraising Cycle

1. What methods do you use for informing donors about the potential for matching gifts? Please choose all that apply:

- Site defined text inserted into solicitation piece
- Site defined text inserted into receipt
- Leaflet listing matching gift programs inserted into solicitation piece
- Leaflet listing matching gift programs inserted into receipt
- Direct interaction with donors during phonathons
- Information posted on your institution's web site
- Focus groups or other networking/communication strategies with constituents in companies that have matching gift programs
- Other (please specify)

2. How effective have these methods been?

	No effect	Some effect	Great effect	Uncertain	N/A
Site defined text inserted into solicitation piece	jn	jn	jn	jn	jn
Site defined text inserted into receipt	jn	jn	jn	jn	jn
Leaflet listing matching gift programs inserted into solicitation piece	jn	jn	jn	jn	jn
Leaflet listing matching gift programs inserted into receipt	jn	jn	jn	jn	jn
Direct interaction with donors during phonathons	jn	jn	jn	jn	jn
Information posted on your institution's web site	jn	jn	jn	jn	jn
Focus groups or other networking/communication strategies with constituents in companies that have matching gift programs	jn	jn	jn	jn	jn
Other	jn	jn	jn	jn	jn

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

jn Greater than 75%	jn 50 - 75%	jn 25 - 49%	jn 10 - 24%	jn 0 -10 %	jn N/A
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4. What strategies have been effective for acquiring employment information? Please choose all that apply:

- Admission applications or enrollment forms
- Alumni directory survey
- Collection of business cards at events
- Individual surveys (follow up to address changes, etc.)
- Professional and other specialized directories
- Phonathon staff asking for employment information
- Buck slips and information update cards in all publications
- Advertisements in publications to collect information
- Online community update form or other data harvesting mechanisms on your web site
- Working with your career center
- Career networking within your online alumni community
- Internet searches
- Running your database through screening services
- Other (please specify)

5. How effective have these strategies been?

	No effect	Some effect	Great effect	Uncertain	N/A
Admission applications or enrollment forms	jñ	jñ	jñ	jñ	jñ
Alumni directory survey	jñ	jñ	jñ	jñ	jñ
Collection of business cards at events	jñ	jñ	jñ	jñ	jñ
Individual surveys (follow up to address changes, etc.)	jñ	jñ	jñ	jñ	jñ
Professional and other specialized directories	jñ	jñ	jñ	jñ	jñ
Phonathon staff asking for employment information	jñ	jñ	jñ	jñ	jñ
Buck slips and information update cards in all publications	jñ	jñ	jñ	jñ	jñ
Advertisements in publications to collect information	jñ	jñ	jñ	jñ	jñ
Online community update form or other data harvesting mechanisms on your web site	jñ	jñ	jñ	jñ	jñ
Working with your career center	jñ	jñ	jñ	jñ	jñ

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Career networking within your online alumni community	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Internet searches	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Running your database through screening services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

- Yes
- No
- Planning within 1 year
- Planning 1-2 years from now
- Planning more than 2 years from now
- Uncertain

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

- Yes
- No
- Planning within 1 year
- Planning 1-2 years from now
- Planning more than 2 years from now
- Uncertain

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

- Monthly
- Quarterly
- Semi-Annually
- Annually - just before the close of FY
- Annually - just before the end of calendar year
- Random - as required
- Other (please specify)

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

- Monthly
- Quarterly
- Semi-Annually
- Annually - just before the close of FY
- Annually - just before the end of calendar year
- Random - as required
- Other (please specify)

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6. 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?

- Yes
- No
- Planning within 1 year
- Planning 1-2 years from now
- Planning more than 2 years from now
- Uncertain

Other (please specify)

2. Do you send a postcard, letter or email to individual donors/employees when their gift is matched?

- Yes
- No
- Planning within 1 year
- Planning 1-2 years from now
- Planning more than 2 years from now
- Uncertain

Other (please specify)

3. Do you include matching gifts when calculating corporate recognition donor honor rolls/recognition for philanthropy directed to your institution?

- Yes
- No
- Planning within 1 year
- Planning 1-2 years from now
- Planning more than 2 years from now
- Uncertain

Other (please specify)

4. What matching gift stewardship ideas have you found to be the most effective or felt were the most interesting?

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7. Your Information

We do not share or release any of your information. We will only use it to contact you for clarification or if we have additional surveys you may be interested in.

1. Your name:

2. Your title:

3. Your email address:

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8. Your Organization

1. Organization name:

2. Institution supported is

Private

Public

Uncertain

3. Type of organization:

Elementary/Secondary Education

Post-secondary Education

Other Academic/Research

Hospital/Clinic

Other Healthcare

Aquarium/Zoo/Botanical Garden

Science/Technology Museum

Art or History Museum

Other Museum

Performing Arts Organization

Global/National/Local Community Service

Other (please specify)

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9. Your Database and Fundraising Software

1. Number of constituent records in your database:

2. Your fundraising/development/advancement software:

Banner

Datatel

Millennium

Raiser's Edge

Sungard Advance

Other (please specify)

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?