

Matching Gifts Best Practices

1. Do you accept matching gifts?

The time has come for us to invite your participation in the 4th annual survey on matching gifts.

The bulk of the survey is as it was last year and we'll be comparing and contrasting to prior surveys with the continued intent of providing ideas on how we can all make our matching gifts practices more effective.

We've revised and upgraded the survey further this year to incorporate questions about any new ideas and strategies institutions might be exploring given recent economic challenges. Some new additions also are questions related to matching challenge grants - both from private and government sources - to assess what impact those programs have as additions or tandems to corporate matching fund revenue.

Many of you have previously participated in the matching gift surveys and we are hopeful that participation will expand once more this year. As with past surveys, results will again be shared first with participants, then posted on FundSvcs and SupportingAdvancement.com. Results have been presented at various conferences over the past 3 years and will also be presented at future conferences - as opportunities arise - including the 2009 CASE Summer Institute for Advancement Services [assembling again in Burlington this July at the University of Vermont].

Everyone's budgets are tightening and matching gift revenue isn't something we can take for granted or just hope will come to us through ad hoc measures; even organizations with the most historically successful matching gift programs are undoubtedly taking steps to minimize economic impact on that revenue stream. Nor can we afford shots in the dark at what might bring in more matching gifts - we need to focus on the tactics that have proven most successful throughout the nonprofit world. Please do take part in the survey; it's a very good investment of 20-30 minutes of your time.

We thank you in advance for your participation.

Amy Phillips and Brian Dowling

If you wish to fill out a print version of the survey and send a PDF to us instead of submitting online, the print version can be found here:

http://www.supportingadvancement.com/potpourri/surveys/matching_gifts_practices/mg_best_practices_2009_print.htm

TinyURL: <http://tinyurl.com/cmpuah>

* 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

Uncertain

★ 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

Uncertain

★ 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

Uncertain

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

Uncertain

Less than
10%

10-20%

21-25%

26-30%

30-39%

40% or
more

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* 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
- 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?

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4. Inserts – standard or customized to your organization

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

5. Online search linked through your organization's website

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

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6. Hard copy directory

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

7. Post-its

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

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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

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

Greater than 75% 50 - 75% 25 - 49% 10 - 24% 0 -10 % Uncertain

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)

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5. How effective have these strategies been?

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

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

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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)

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. If your response to question 1 is "Yes", at what point do you incorporate matching gifts when recognizing individual donors in giving societies/honor rolls?

Known matching gift program affiliation but no confirmed current FY match request

Known matching gift program affiliation and confirmed current FY match request

Known matching gift program affiliation and confirmed current FY match payment

Other (please specify)

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3. 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)

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. Private Challenge Grants

Other types of private challenge grants are also used to help leverage donor giving.

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

Yes

No

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

0

1 to 3

4-9

10 or more

Other (please specify)

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

Individual

Corporation

Foundation

Other (please specify)

Matching Gifts Best Practices

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

- Collections/Exhibitions
- Community Outreach/Public Programs
- Endowment
- Facilities
- Faculty/Staff Campaign
- Free Health Clinic Services
- New Contributions
- Student Aid - Graduate
- Student Aid - Undergraduate

Other (please specify)

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

- 3:1
- 2:1
- 1:1
- .5:1

Other (please specify)

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

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

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7. Have you any additional comments on private matching challenges?

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8. Government Matching Programs

In addition to corporate matching programs, some government agencies have matching programs.

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

Yes

No

2. In how many government matching fund programs do you anticipate participating this fiscal year?

0

1 to 3

4-9

10 or more

Other (please specify)

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

Local/Regional

State/Provincial

National/Federal

Other (please specify)

Matching Gifts Best Practices

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

- Collections/Exhibitions
- Community Outreach/Public Programs
- Endowment
- Facilities
- Faculty/Staff Campaign
- Free Health Clinic Services
- New Contributions
- Student Aid - Graduate
- Student Aid - Undergraduate

Other (please specify)

5. What matching program ratios have you been offered?

- 3:1
- 2:1
- 1:1
- .5:1

Other (please specify)

6. How much of your total funds raised has come from a government matching program?

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

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7. Have you any additional comments on government matching programs?

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9. Matching Gifts and the Current Economy

The current economy is not only creating challenges for all fundraising but also for matching gifts.

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

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?

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10. 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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11. Your Organization

1. Organization name:

2. Address and location:

Address 1:

Address 2:

City/Town:

State/Province:

ZIP/Postal Code:

Country:

3. Your organization's web site address:

4. Institution supported is

Private

Public

Uncertain

Other (please specify)

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5. Type of organization:

- Academic - Elementary/Secondary Education
- Academic - Post-secondary Education
- Academic - Other/Research
- Animal Welfare
- Aquarium/Zoo
- Environment
- Fine Arts/Performing Arts Organization
- Healthcare/Hospital/Medical Center
- Museum - Art/History/Cultural
- Museum - Science/Technology
- Museum - Other Museum
- Organizationally Related Foundation
- Public Broadcasting
- Religious
- Social Service/Relief/Aid
- Other (please specify)

6. What is the total number of Advancement/Development staff in your organization?

Total Staff

Staff in a Central or Head Office Location

Staff in Field/Branches/Program/Units Based

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12. Your Database and Fundraising Software

1. Number of constituent records in your database:

Total	<input type="text"/>
Active	<input type="text"/>
Deceased/Inactive	<input type="text"/>

2. Your fundraising/development/advancement software:

- Agilon - Ascend
- Agilon - ONE
- Blackbaud - Enterprise CRM
- Blackbaud - eTapestry
- Blackbaud - Raiser's Edge
- Blackbaud - Team Approach
- Datatel - Benefactor
- Datatel - Colleague
- DonorPerfect
- In House, Custom or Home Grown
- Oracle - Contributor Relations
- SAGE - Fundraising 50
- SAGE - Millennium
- SunGard - Advance C/S
- SunGard - Advance Web
- SunGard - Banner
- Other (please specify)

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13. Your Comments on this and Future Surveys

We continually try to make improvements to SupportingAdvancement.Com. Your comments on this and future surveys are valued and we appreciate any feedback you are willing to share.

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

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

3. Any other comments, additions, deletions or changes that should be made in future surveys?

4. Are there any other surveys that you'd like SupportingAdvancement.Com to do?

SupportingAdvancement.com is happy to co-host any professional surveys you might want to develop; if you are interested, please submit a draft outline of questions to services@supportingadvancement.com and you will be contacted for finalization and scheduling of survey posting, distribution and analysis.