

# Matching Gifts Best Practices 2012

## 1. Do you accept matching gifts?

We have passed the mid-decade mark now and the time has come again for us to invite your participation in the 7th annual survey on matching gifts.

The content of much of the survey is basically unchanged from the previous few years to facilitate comparing and contrasting with prior surveys. There are some minor tweaks and a number of the questions within some of the sections now require answers in order to help improve the validity of the information collected.

Ethical considerations related to matching gifts might not seem like a real issue or have a need for consideration, but questions seem to come up for discussion on a fairly regular basis about how – or even if – some matching gift requests should be processed. This year, a section has been added to the survey with commonly asked questions and it is also, as with the rest of the survey, completely optional and completely confidential. The incorporation of these ethical FAQs is only to assist in establishing and understanding industry standards and best practices as we do our best to properly steward corporate matching funds.

There is, of course, continued intent to provide real data from which we all might develop tactics that help make our institutional matching gifts practices more effective.

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 be shared first with participants, then posted on the SupportingAdvancement.com site as well as through the FundSvcS listserv. Results have been presented at various conferences over the past 6 years and will also be presented at future conferences and webinars - as opportunities arise.

The economy is still uncertain and has not yet improved to the point where matching funds might be shrugged off as nice bonus dollars - they continue to be critical revenue streams that we cannot afford to take for granted or just hope will come to us through ad hoc measures. There is a continued need for focus on the tactics that have proven most successful throughout the nonprofit world. Please take part in the survey; it's a very good investment of 20-30 minutes of your time.

Help increase participation by forwarding this survey to some of your colleagues and ask them to participate so results can be more valuable for all.

Our thanks - 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/surveys.htm>

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**\*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/development departments is primarily responsible for enhancing and improving the matching gift revenue stream?**

- Advancement Services
- Annual Giving
- Corporate Foundation Relations
- Membership
- Cross-divisional responsibilities (no single department)
- Other (please detail)

**\*3. Which of your advancement/development departments gets fiscal recognition for raising matching gifts? (This is sometimes different from which division(s) may be responsible for soliciting or processing the gifts; this is not referring to the allocation where funds are deposited.)**

- Advancement Services/Development Operations
- Annual Giving
- Corporate Foundation Relations
- Membership
- Cross-divisional credit (no single department)
- Other (please detail)

## Matching Gifts Best Practices 2012

**\*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):**

# Matching Gifts Best Practices 2012

## 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

## Matching Gifts Best Practices 2012

**\*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

**\*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

### 4. Our Vendors and Partners

The questions in this section focus 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
- No - Planning 1-2 years from now
- No - Planning more than 2 years from now
- No - No plans to use vendor products
- Uncertain

# Matching Gifts Best Practices 2012

## 5. Our Vendors and Partners

**\*1. Which vendors have you used for matching gift products or services? Please choose all that apply:**

- Blackbaud Matchfinder
- SAGE Millennium GM [based on HEP data]
- HEP Giftplus
- HEP/CASE Matching Gift Network
- Other (please specify)

**\*2. 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?

## Matching Gifts Best Practices 2012

### **\*3. 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
- We Don't Use

### **\*4. Online search linked through your organization's website**

- 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
- We Don't Use

## Matching Gifts Best Practices 2012

### \*5. Hard copy directory

- 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
- We Don't Use

### \*6. Post-its

- 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
- We Don't Use

### \*7. 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
- We Don't Use

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

### \*9. Do you use one of the matching gift databases to automatically populate corporate matching program parameters for ease of processing when gifts and pledges are entered into the system?

- Yes
- No
- Uncertain

### 10. 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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**\*11. 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

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

## 6. 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
- Separate solicitation/stand alone notification to individuals with employment record reflecting matching gift potential
- 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
- We don't inform or market matching gifts to our donors
- Other (please specify)

# Matching Gifts Best Practices 2012

## 2. How effective have these methods been?

	No effect	Some effect	Great effect	Uncertain	N/A
Site defined text inserted into solicitation piece	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Site defined text inserted into receipt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Leaflet listing matching gift programs inserted into solicitation piece	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Leaflet listing matching gift programs inserted into receipt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Separate solicitation/stand alone notification to individuals with employment record reflecting matching gift potential	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Direct interaction with donors during phonathons	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Information posted on your institution's web site	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Focus groups or other networking/communication strategies with constituents in companies that have matching gift programs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## \*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

## Matching Gifts Best Practices 2012

### 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)

# Matching Gifts Best Practices 2012

## 5. How effective have these strategies been?

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

## Matching Gifts Best Practices 2012

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

- Yes
- No - Planning within 1 year
- No - Planning 1-2 years from now
- No - Planning more than 2 years from now
- No - No plans to do so
- 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
- No - Planning 1-2 years from now
- No - Planning more than 2 years from now
- No - No plans to do so
- 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
- We do not send reminders
- Other (please specify)

## Matching Gifts Best Practices 2012

**\*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
- We do not send reminders
- Other (please specify)

## 7. 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
- No - Planning 1-2 years from now
- No - Planning more than 2 years from now
- No - No plans to do so
- 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)

## Matching Gifts Best Practices 2012

### \*3. Do you send a postcard, letter or email to individual donors/employees when their gift is matched?

- Yes
- No - Planning within 1 year
- No - Planning 1-2 years from now
- No - Planning more than 2 years from now
- No - No plans to do so
- Uncertain

Other (please specify)

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

### 8. 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
- Uncertain

## 9. Private Challenge Grants

**\*1. 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)

**\*2. 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 2012

### 3. 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/Subsidized Health Clinic Services
- New Contributions
- Student Aid - Graduate
- Student Aid - Undergraduate
- Student Aid - Other

Other (please specify)

### 4. What private matching challenge ratios have you been offered?

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

Other (please specify)

### \*5. 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

**6. Have you any additional comments on private matching challenges?**

### 10. 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
- Uncertain

## 11. Government Matching Programs

**\*1. 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)

**\*2. 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 2012

### 3. 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/Subsidized Health Clinic Services
- New Contributions
- Student Aid - Graduate
- Student Aid - Undergraduate
- Student Aid - Other

Other (please specify)

### 4. What matching program ratios have you been offered?

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

Other (please specify)

**\*5. 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

**6. Have you any additional comments on government matching programs?**

### 12. 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?**

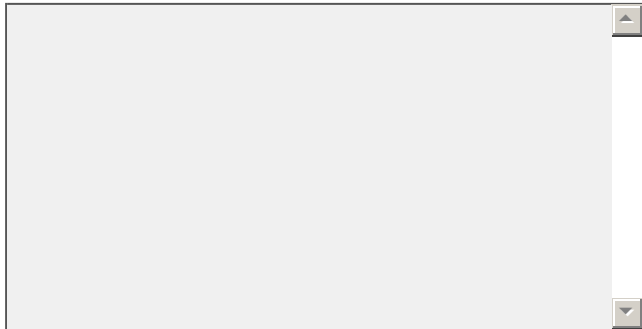
**2. Based on what appears to be an increasing number in cancellations of matching gift programs, are you doing anything differently to either compensate for reductions in revenue or to encourage organizations to continue their programs?**

## 13. Matching Gifts and Ethical Considerations

Ethical considerations related to matching gifts might not seem like a real issue or have a need for consideration, but questions seem to come up for discussion on a fairly regular basis about how – or even if – some matching gift requests should be processed. The incorporation of these ethical FAQs is only to assist in establishing and understanding industry standards and best practices as we do our best to properly steward corporate matching funds.

**1. When a matching gift request is submitted where the donor has a spouse that works for a matching gift company, and the company’s matching gift program does not allow for spouse matches, our organization’s policy is to:**

- Process the matching request anyway as if it came only – or primarily in the case of joint gifts – from the employee and hope/assume the company’s matching program will never find out.
- Contact the donor to provide them with the details of why your organization cannot submit a spousal matching claim and offer an opportunity for their spouse to make the gift instead.
- Other (please specify)



## Matching Gifts Best Practices 2012

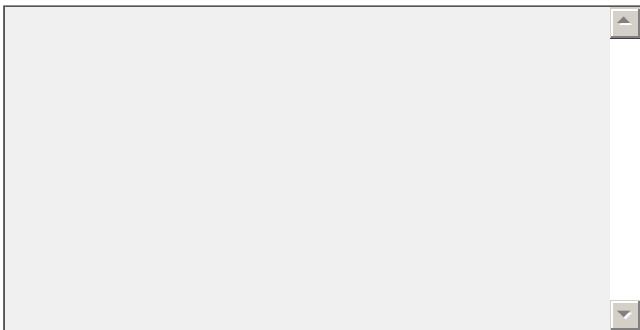
### **2. When spouses make a joint gift and each are otherwise eligible for employer matching funds – except for “double matching” of the same gift – our organization’s policy is to:**

- Process the full matching gift request to each spouse’s company’s program anyway and hope/assume the companies' respective matching programs will never find out.
- Contact the donor to provide them with the details of why your organization might need to either submit one request to either company for the full amount or possibly half of their total gift to each matching gifts program.
- Other (please specify)



### **3. When a matching gift request is submitted where the donor’s gift is in support of a restricted fund type that the company’s matching gift program does not match, our organization’s policy is to:**

- Process the matching request anyway and hope/assume the company’s matching program will never find out.
- Contact the donor to provide them with the details of why your organization cannot submit a matching claim for that purpose and ask if they wish to reallocate the gift to a fund that can be matched.
- Other (please specify)



## Matching Gifts Best Practices 2012

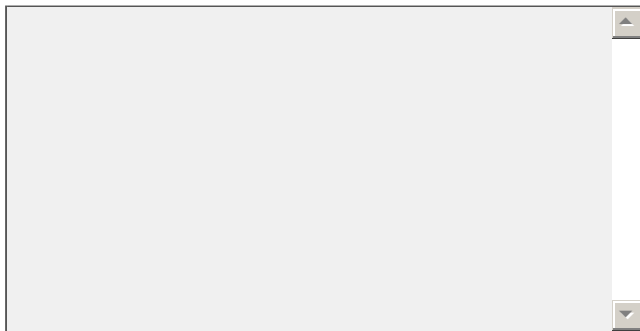
### **4. When a matching gift request is submitted where the donor's gift was actually made through a donor advised fund or family foundation and the company's matching program does not match such gifts, our organization's policy is to:**

- Process the matching request anyway as though the funds came directly from the employee and hope/assume the company's matching program will never find out.
- Contact the donor to provide them with the details of why your organization cannot submit a matching claim and offer an opportunity for them to make a gift directly to the organization instead of the DAF or foundation.
- Other (please specify)



### **5. When a matching gift request is submitted where the employee/donor gift enables him/her to receive benefits and the company's matching gift program prohibits the employee/donor from obtaining benefits derived from the matching funds, our organization's policy is to:**


- Process the full matching gift request anyway and hope/assume the company's matching program will never find out.
- Contact the donor to provide them with the details of why your organization can only submit a matching claim for the deductible portion of the gift (provided the gift is otherwise eligible).
- Other (please specify)



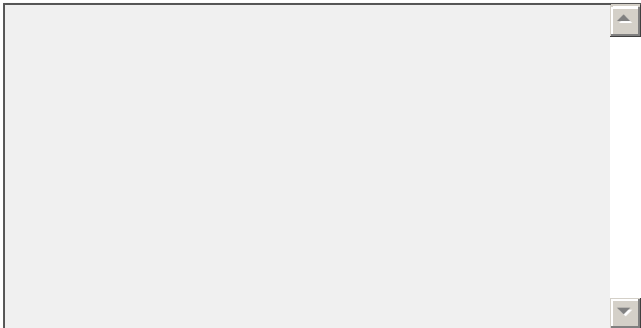
## Matching Gifts Best Practices 2012

### **6. When it is unclear whether or not a donor's gift is eligible to be matched through their employer's matching gift program, our organization's policy is to:**

- Ignore any potential issue, process the matching request anyway and hope/assume the company's matching program will never find out.
- Contact the company's matching program to clarify any concerns and get their official response before determining next steps for handling the matching gift request.
- Other (please specify)

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### **7. What other scenario(s) have you faced where the question of ethical practices related to matching gift processing had to be addressed?**

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## Matching Gifts Best Practices 2012

### 14. 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:**

## 15. Your Organization

### \*1. Organization name:

### 2. Address and location:

Address 1:

Address 2:

City/Town:

State/Province:

ZIP/Postal Code:

Country:

Phone Number:

### 3. Your organization's web site address:

### \*4. Institution supported is

- Private
- Public
- Uncertain

Other (please specify)

## Matching Gifts Best Practices 2012

### \*5. Type of organization/related foundation:

- 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
- 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	<input type="text"/>
Staff in a Central or Head Office Location	<input type="text"/>
Staff in Field/Branches/Program/Units Based	<input type="text"/>

## 16. 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
- Convio - Common Ground
- 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)

### 17. 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](mailto:services@supportingadvancement.com) and you will be contacted for finalization and scheduling of survey posting, distribution and analysis.