



ultimate guide to

matching gifts



Double *the* Donation
matching gifts made easy

<https://doublethedonation.com>



“ “ I want **my**
employer to
match my gift! ” ”

“ “ We want **your**
employer to
match your gift! ” ”



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Matching Gift

basics

Why are matching gifts important?

Matching gifts are free money that nonprofits often overlook. Your organization has already done the heavy lifting of attracting donors and receiving donations, so don't let easy, additional funding slip away.

What are matching gift programs?

Extensions of corporate philanthropy, matching gift programs are designed to be the means by which companies support employee charitable giving. Companies match donations made by employees to a wide range of nonprofits.

Why do organizations overlook matching gifts?

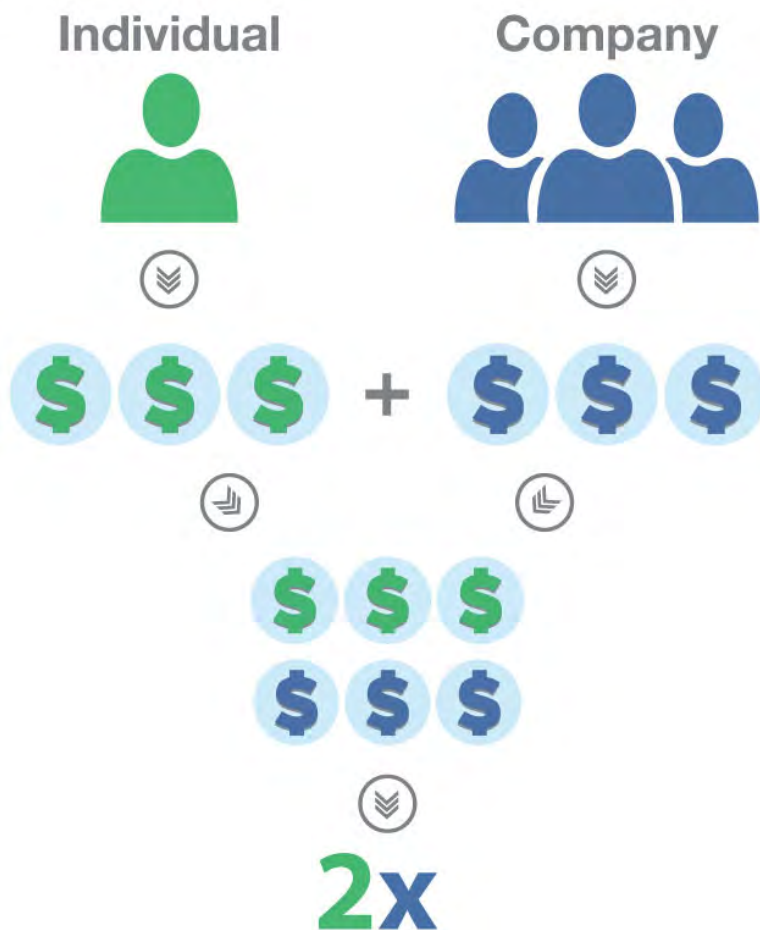
Nonprofits struggle to cultivate potential matching gifts due to limited information on donors' employers, gaps in knowledge of specific corporate giving programs, and difficulties communicating guidelines and instructions.

A matching gift program is a corporate philanthropy program designed to support the nonprofits which a company's employees are passionate about by matching donations made by employees.

Matching Gift Basics

Matching gifts elevate the capability of your donors' contributions. One donation is always welcome. Two donations for the work of acquiring one seems too good to be true. It's not. Matching gifts give nonprofits that exact opportunity.

Companies big, small, and everything in between, match gifts. Most programs are not only generous about giving money, but are willing to donate to a broad spectrum of organization types.



The

details

Nonprofit Eligibility,
Ratios & Amounts

Nonprofit Eligibility



Matching gifts are a goldmine for nonprofits, but there are some limitations on organization eligibility. Since program standards vary company to company, there are *no universal guidelines* — you cannot know your eligibility for all matching gift programs.

Many nonprofits are eligible to receive money from matching gift programs.

Double the Donation analyzed our database and found that about two-thirds of companies match donations to most 501(c)3 organizations and educational institutions while the remainder matched to nonprofits which fall into one or multiple broadly defined categories such as:

- Higher Education
- K-12 Education
- Arts and Cultural Organizations
- Community Based Social Services
- Environmental Organizations
- Healthcare Based Organizations

Common restrictions of types of organizations ineligible to receive employee matching gift funds include:

- Political Organizations
- Sports Teams
- Religious Organizations
- Houses of worship, but many faith-based organizations with major community outreach components are matching gift eligible.

Ratios & Amounts



The amount that a company will match is based on a combination of the matching gift ratios, maximums, and minimums. Combine all three of these factors and you'll be ready to predict what your nonprofit will rake in from those lucrative matching gifts!

A single additional gift matched can provide thousands of dollars for your organization.

1. Match Ratio:

Companies determine how much to match for employee donations based on a preset ratio. The majority of companies match donations at a 1:1 ratio, or dollar for dollar. In the case of a 1:1 ratio, if an employee gives your nonprofit \$100 and her employer agrees to match it, you'll end up with \$100 from the company for a total of \$200. You've doubled your donation! Although you can expect to see a lot of 1:1 ratios, they can range from .5:1 all the way up to 4:1. Ratios are typically standardized across all employee types, but sometimes a company will stipulate that, for example, part-time employees or retirees or executives will have different match ratios.

2. Maximum Match:

Maximum matches have quite the range. You'll see upper limits from \$1,000-\$15,000 on average, but there are plenty of matches that are outside that scope.

3. Minimum Match:

Usually, a company will set a donation minimum, meaning that if a donor's contribution falls below that set amount, the company will not match the gift. Most commonly, that dollar amount is \$25, but it can range from \$1-\$100.

Match Ratio Examples:

- Puget Sound Energy matches donations at a .5:1 rate.
- Apple matches donations at a 1:1 rate.
- Soros Fund Management matches donations from partners at a 2:1 rate and employees at a 3:1 rate.

Maximum Match Examples:

- The Avis Budget Group matches donations up to \$100 annually per employee.
- Merck matches donations up to \$30,000 annually per employee.
- General Electric matches donations up to \$50,000 annually per employee.

Minimum Match Examples:

- Harris Corporation matches employee donations as long as they're greater than \$10.
- LyondellBasell Industries matches employee donations of \$100 or more.

Top Matching Gift

Companies

Top Matching Gift Companies

Double the Donation maintains a database of companies that incorporate matching gifts. **65%** of Fortune 500 companies plus many others offer matching gifts and these are some of the best.

Encouraging donors to submit their matching gifts is the key to raising more in matching gift funds.



BP British Petroleum

BP offers practically every type of employee giving program and allows the general public to track which organizations are receiving donations online in real time. The company provides a standard 1:1 match on all donations made by employees.

The company also offers a 100% match on all money raised by employees for charity runs, walks, etc.



General Electric

In 1954, the GE Foundation created the Corporate Alumni Program, which was the first corporate gift-matching program. Today, the GE Foundation matches over \$42 million annually to most 501(c)(3) organizations and accredited educational institutions (including K-12 schools).

GE created the model for corporate employee matching gift programs.

SOROS

Soros Fund Management

SOROS Fund Management

SOROS Fund Management offers the most generous limits on corporate matching gift programs. The company's 3:1 match for employees and 2:1 match for partners is a strong incentive for employees to give back to their communities.

The company matches up to \$300K in annual donations per employee. This dollar amount is by far the highest limit for any corporation.



Gap Corporation

The Gap Corporation, which includes Banana Republic, Old Navy, Piperlime, Athleta, and Intermix, offers a matching gift program as well as multiple types of volunteer grants. Gap employees can request matches on donations made to almost all types of nonprofits. Match limits range from \$1,000 annually for part-time employees to as much as \$10,000 for Senior VPs and above.

Gap offers one of the most comprehensive and easy to use online systems to submit match requests.

ExxonMobil

Exxon Mobil

Exxon Mobil donates hundreds of millions of dollars to charities each year, which makes it one of the largest corporate donors. Much of Exxon Mobil's corporate philanthropic giving comes from its matching gift programs

A 3:1 match on donations to educational institutions (1:1 match to all arts & cultural organizations) contributed to the company and its employees dedicating over \$269 million to nonprofits in 2014.



STATE STREET

State Street Corporation

State Street also offers nearly every type of employee giving program. The company matches donations from all global employees to most nonprofits.

State Street matches the fundraising efforts of its employees up to \$5,000 annually.



CarMax

CarMax matches donations to nearly every nonprofit. In addition to their 1:1 match on all donations, the company also offers a generous volunteer grant program.

CarMax matches donations made by an employee's dependents until they turn 26.

Boeing

Boeing matches employee and retiree donations to most nonprofits. The company provides a dollar for dollar match on the first \$6,000 donated per employee and a 50% match on donations from retirees.

Boeing provides a \$100 grant to a nonprofit every time an employee participates in a run / walk / bike type of event.



Johnson & Johnson

Johnson and Johnson matches donations to nearly every nonprofit. Each of the company's 120,000 employees, plus retirees, are eligible to request up to \$10,000 in personal contributions to be matched each year.

A 2:1 matching ratio for current employees and a 1:1 rate for all retirees.



Microsoft

Microsoft

Microsoft is widely known to have one of the leading employee giving programs. Last year, the company matched more than \$47 million in employee donations to a wide variety of charities.

More than \$1 billion donated through employee giving programs since instituting a match program.

Marketing

Matching Gifts

marketing matching gifts

Even your most dedicated donors don't always submit their matching gift requests. Outside of the fundraising community, you'd be surprised by how few people know about corporate giving.

Donors are rarely aware of whether or not their employer, or their spouse's employer, offers a matching gift program. If your donors are already passionate enough to open up their wallets, then they should be happy to invest in a simple, short process to double their donations.

The world is not flat, and your bottom line shouldn't be either. Properly market matching gifts through a variety of strategies in order to increase fundraising. Then you can hold a hulking sphere of cash and use it to do some good for the world.



*Your nonprofit wants to both **prompt** donors to submit their matching gift forms and make it as **easy** as possible to do so.*

Suggested places to feature matching gifts include:

- On donation forms
- On a dedicated matching gift page
- Across social media
- In emails
- Across your fundraising communications

In the donation process



Provide easy access to matching gift forms, guidelines, and instructions throughout the donation process.

Across your website



Feature matching gifts throughout your website to help supporters quickly find matching gift forms, guidelines, and instructions.

Across communications



Drive donors and volunteers to your matching gift page by promoting matching gifts across your nonprofit's communications.

Matching Gift

Statistics

Statistics:



DID YOU KNOW



65% of Fortune 500 companies and many other smaller companies match employee donations to a wide range of nonprofits.

- An estimated **\$6-\$10 billion** in matching gift funds goes unclaimed per year.
Source: Double the Donation's Analysis of Matching Gift Participation Rates
- The median employee participation rate for matching gift programs is **9%**.
Source: 2014 CECP Giving in Numbers Report
- Mentioning matching gifts in fundraising appeals results in a **71%** increase in the response rate and a **51%** increase in the average donation amount (and that's prior to receiving matching gift funds).
Source: Tech Soup: Which Fundraising Strategies Work?
- **93%** of companies have a minimum match requirement of less than or equal to **\$50**.
Source: Double the Donation's Analysis of Matching Gift Programs
- **80%** of companies' matching gift maximums fall between **\$500** and **\$10,000** annually per employee.
Source: Double the Donation's Analysis of Matching Gift Programs

Matching Gift

Submission Process

Submission Process:

The entire matching gift process can be completed by a donor in less than five minutes. The key is to ensure donors know if their company will match their gift and provide them with the forms or links needed to submit their matching gifts.

Double the Donation provides nonprofits with an easy way to share matching gift guidelines, forms, and instructions with donors so more of your donors will submit their matching gift requests.

Different companies have different deadlines. Awareness of these dates ensures that you don't miss out on easy money.

Donation Process

Donors make donations to your nonprofit.



Match Eligibility

Donors determine if their employers match their donations.



Forms Submitted

Donors submit matching gift requests electronically or using a paper form.



Funds Dispersed

Nonprofit verifies a donation was made and corporations issue checks.

Standard matching gift submission deadlines include:

Within a set number of months after the date of the donation, most often 3 - 12 months:

- Adobe - 12 months
- DirectTV - 6 months
- Altria - 90 days

End of the calendar year:

- Freeport-McMoRan - until Dec. 31st of the year the donation was made

End of January, February, or March in the year subsequent to when the donation was made:

- Verizon - before March 31st of the year following the date of the donation



Many past donors are still eligible to submit matching gift requests to their employers.

Measuring your

Matching Gift

Performance



Measuring your Matching Gift Performance:

If you don't know how many matching gifts you're receiving or how much money you're making from those donations, then you don't know if you're improving your intake of these generous corporate funds.

Tracking data can be hard, but you need to know where you stand in order to show that you've improved. Also, reporting matching gift data to donors can help encourage future donations.

Some basic numbers you want to track:

- Number of matching donations
- Total money raised from matching gifts
- Percentage of donations that included matching gifts
- Percentage of total revenue raised from matching gift

Double the Donation's

Matching Gift Service



Double *the* Donation

Double the Donation's team maintains an up-to-date database of companies which match donations from their employees to nonprofits and provides an easy way for your nonprofit to share the necessary information with donors.

Donors enter their employers' names and gain access to accurate and useful matching gift and

volunteer grant information.

Everything Double the Donation does is specifically designed to help your nonprofit maximize the amount of money being raised from employee matching gift and volunteer grant programs.

Double the Donation provides:



Matching gift forms (both paper & online links)



Easy-to-understand instructions & guidelines



Minimum & maximum amounts matched



Matching gift ratios



Volunteer grant information for volunteers



Company contact information

Raise Awareness

Double the Donation helps you inform donors about employee matching gifts and the financial rewards to ensure eligible donors are aware of matching gifts.

Make it Easy

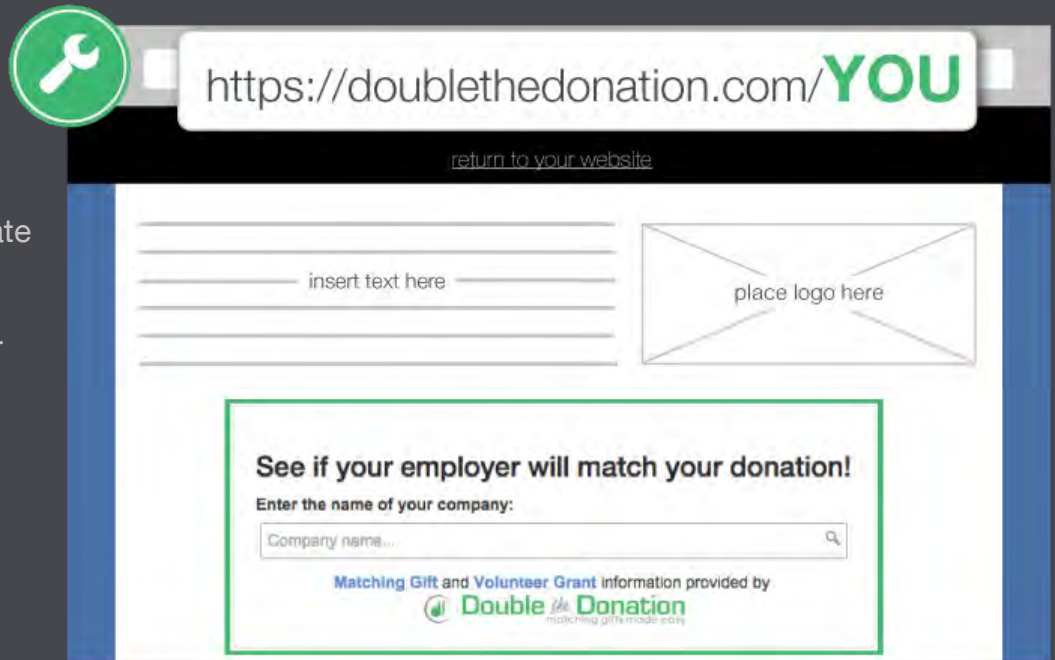
Double the Donation makes the process as simple as possible and gives donors all they need to successfully submit matching gifts.

Increase Revenue

Double the Donation's service helps you increase funding for your nonprofit by maximizing matching gift revenue.

Option 1:

Use a customizable template on Double the Donation's website to create a matching gift page for your organization.



Option 2:

Place Double the Donation's matching gift plugin on your own website and in your donation process



Both options allow your donors to determine if their company offers a matching gift program and to access company specific matching gift forms, guidelines, and instructions

Matching Gift

Best Practices

11 Most Valuable Matching Gift Best Practices

Have you ever been to a movie double feature? They are great. You get in the movie going mood, take the time out of your busy life to make it to the theater, buy your popcorn, sneak in your candy, splurge on a huge soda, and then settle in for two great films. Oh, and most importantly, you're only paying for one.

Matching gifts are fundraising double

features; for the time and cost of acquiring one donation, you get twice the funding. However, just like it takes a bit of extra planning and time management skills to get yourself to a double feature, it will take your team a bit of extra work to secure those matched gifts.

To ensure that your nonprofit maximizes its efforts, we've curated a list of the 11 most valuable matching gift best practices. Follow these tips, lean back in your seat, and watch the credits roll.

#1: Study Up on Matching Gifts

Try to build a strong foundation of knowledge, so that when you implement your program you'll be set to handle obstacles as they arise. Having a keen sense of matching gifts and what goes into obtaining them will be crucial in planning your program and standardizing your processes.

#2: Appoint a Matching Gift Coordinator

Your nonprofit will be better served by appointing one person as the matching gift coordinator than it would be by having your whole staff know just a few facts about matching gifts. The coordinator is the expert, and the rest of your employees should know enough to field the questions that they can and pass along the rest. If you don't have the funds or employee base to designate a matching gifts coordinator, set aside some time and have a team do the research to put together matching gift materials including:

- educational packets
- newsletter copy
- fast facts
- letter templates
- answers to FAQs

#3: Raise Awareness

People need to know about matching gifts before they can request them. With the help of technology, nonprofits have plenty of ways to promote matching gifts. Put matching gifts on your 'ways to give' page, create a dedicated matching gift page, or outline matching gifts in an email newsletter.

11 Most Valuable Matching Gift Best Practices

#4: Collect Donor Employer Details When Appropriate

Part of your educational materials for donors will give them access to determine if their companies have matching gift programs, but if your staff is able to readily see the employer of any given donor in your database, they can then go the extra mile to obtain that donation. Knowing the companies donors work for will help you segment out matching gift prospects.

#5: Strive for Easy Accessibility

Clear and concise language, with easy to understand directions will make your donors much more likely to seek out matching gifts. You can:

- List the typical steps involved in the process on your dedicated page
- Insert a matching gift widget that can help the donor search for his or her company's program
- Send out informational mailed materials
- Highlight key matching gift statistics
- Point out a few of the companies that commonly match gifts for your nonprofit and detail those programs
- Ensure that your nonprofit is a one-stop shop for all things matching gift.

#6: Keep Records of the Matched Gifts through the Entire Process

Essentially, you'll want to know what requests have been made, when they are processed, and when they have been fulfilled. Keeping accurate records will guarantee that no attempted matching gifts slip through the cracks. The more standardized and systematic the process you use is, the better the results will be. So that you can properly grade your program track:

- the matching gift money raised in previous years
- the matching gift money raised in the time following your program's inception
- your top matching gift employer
- the costs and time it takes to acquire the gifts
- the percentage of your total revenue that matching gifts account for

11 Most Valuable Matching Gift Best Practices

#7: Thank Your Donors

Thank once for the initial donation and a second time when the matched gift goes through. You might want to put together a special event to honor matching gift donors. The goal is to show genuine gratitude towards what they've done to help. Find a way to demonstrate your gratitude and ensure that the donors feel appreciated.

#8: Cultivate Relationships with Donors' Companies

You should also consider thanking your donors' companies. Matching gifts can provide a much desired introduction to major corporations with top-notch corporate giving. If you want to foster a new relationship, your nonprofit is going to have to impress the company.

#9: Maintain Your Donor Records

A disorganized and dysfunctional donor database is really going to hold your fundraisers back when it comes to matching gifts. Keeping the information in your system and keeping it up-to-date will help matching gift coordinators to easily access the information.

#10: Perform a Prospect Screening

If you're looking for donors with large capacities to donate and great matching gift programs, prospect screenings are going to be a big help. A major insight prospect research can provide is the list of business affiliations of potential donors, like where they work and where their spouses work. With the knowledge derived from prospect screening you'll be able take a well-prepared approach to finding matching gift donors.

#11: Track and Review Your Progress

No one can get better without locating weaknesses and focusing on changing them. An established system designed with achievement assessment in mind is a valuable asset.



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