



Double *the* Donation
matching gifts made easy

Matching Gift Buy-In:

How to Spark Team-Wide Engagement

A guide for securing support for matching
gifts across your organization

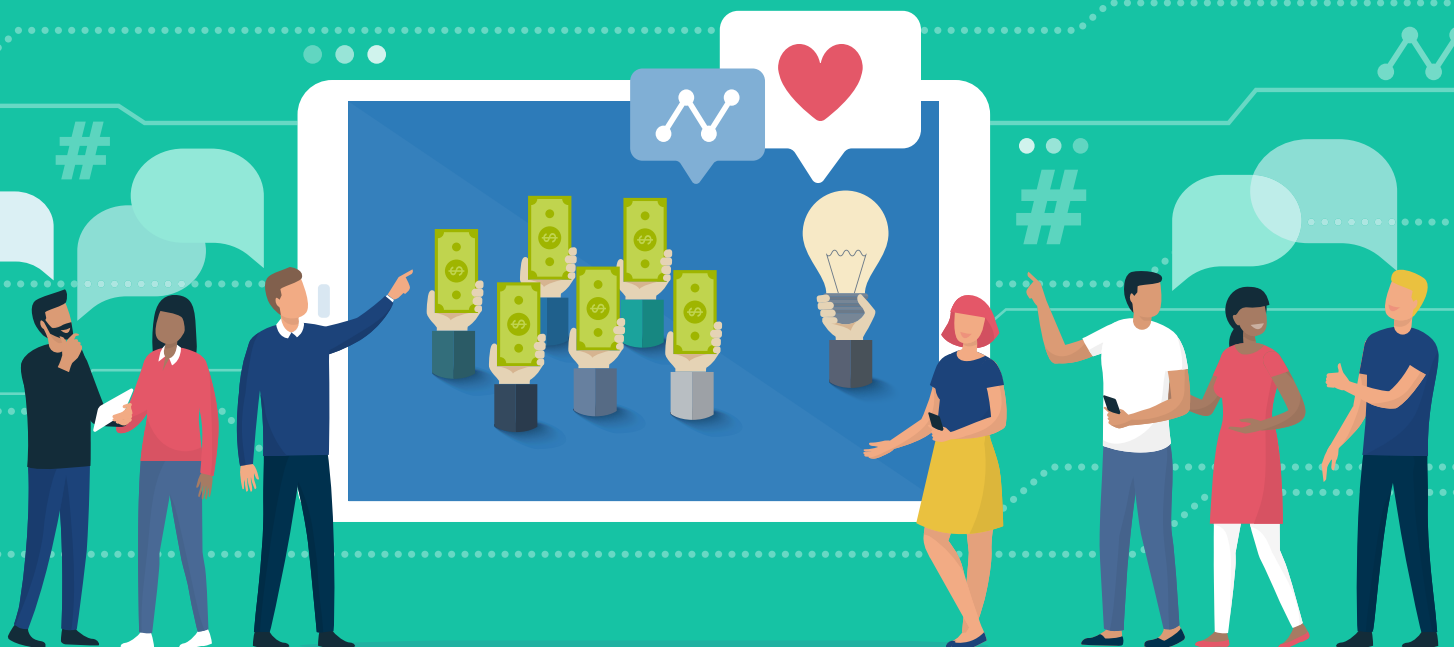




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A photograph of a business meeting in a modern office, overlaid with a teal color. A man in a white shirt stands at the front, holding a tablet and pointing towards a whiteboard. Four other people (two men and two women) are seated around a wooden conference table, looking at documents and the whiteboard. The whiteboard displays a line graph and a pie chart. The office has a white shelving unit with binders and books in the background.

The Ever-Growing Importance of Buy-In

The Ever-Growing Importance of Buy-In

As more companies develop philanthropic giving initiatives, the buzz around matching gifts continues to grow *and for good reason*. For nonprofit organizations, every dollar counts, and matching gifts are a straightforward, easy way to skyrocket funds.

Once they get past the initial lack of knowledge, most nonprofit fundraisers have no issues getting donors motivated and submitting their matching gift requests. The real issue lies with getting your organization's leadership and staff on board from the get-go.



Team members may not initially see the value of matching gifts. They may think their efforts are better spent elsewhere. But as you probably know, matching gifts are a goldmine and can truly add up with a proactive team (hence why you're reading this). If *you* want to secure every last matching gift dollar possible, you need everyone on board and promoting matching gifts to donors. It's up to you to clear the gap and build the momentum needed to generate team-wide engagement.

From leadership to staff, rallying up organization-wide support is crucial to fulfilling your matching gift potential. In this article, we'll cover exactly what you need to accomplish this, from easy ways to educate your team on the process to data you can use to convey the importance of matching gifts. Together, we'll create an end-to-end plan for securing your portion of the **\$4-7 billion in matching gift funds** that goes unclaimed each year.

Let's get started!



**Getting Your
Organization
On Board with
Matching Gifts**

Getting Your Organization On Board with Matching Gifts

Securing Leadership Support

Securing support is easier said than done, but without doing so, any outreach efforts will fall flat. You'll see a small percentage of matches fulfilled at best. If you fall under this category, take a top-down approach by shifting your focus to leadership.

In almost all cases, leadership buy-in is difficult to acquire. **However, you need to get those who are in control to see the value of matching gifts.** Attaining support from these powerful individuals gives you the momentum you need to get the entire organization motivated for matching gifts. This is because these individuals can advocate for matching gifts and quickly spread the word to their subordinates.

So this begs the question:
how exactly do you secure leadership support?

Considering that many nonprofits are stuck at the mixed buy-in stage and often struggle to get full support, building momentum takes a targeted, proactive approach. Here are great starting points for honing in on high-powered individuals within your organization:

Leverage internal data.



Instead of simply talking about the difference matching gifts can make, *show* them. Humans are visual learners; they prefer to see the potential instead of relying on verbal promises.

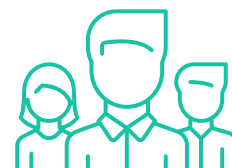
In an eye-catching format, display the following organization-specific data:



Amount of Match-Eligible Donations vs. Actual Submitted Matches

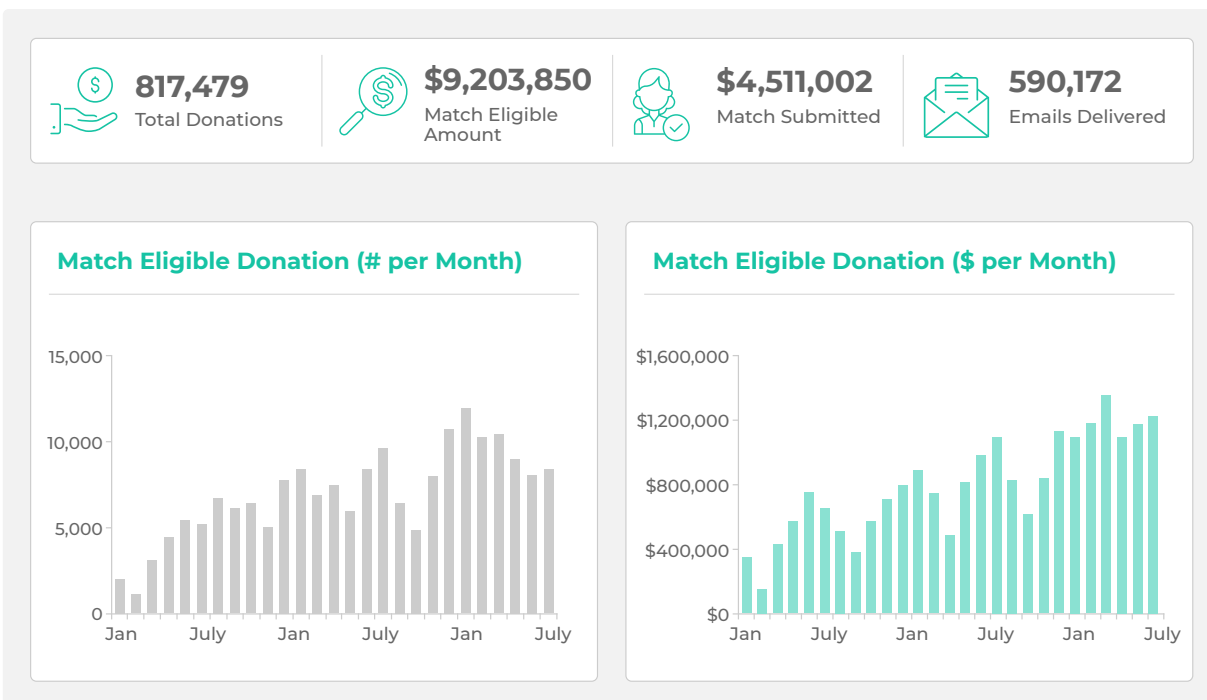


Total Revenue Raised from Matched Donations



Number of Donors who Work for Companies that Offer Matching Gifts

A visual format is *much* more engaging than straight statistics—no matter how impressive those numbers may be. **Double the Donation** offers a great format for displaying key data points in a visually-engaging way. Below, you'll see an example of what a customer would see when logging into the Double the Donation platform. Notice how it presents the data in an easy-to-understand and concise way with visuals that physically show matching gift growth over time:



This is just a fraction of the data you should be sharing with your leadership. **Jump ahead** to see additional types of key data points that can help you illustrate your matching gift potential.

Spend time thinking about matching gifts.



If you're concerned with the amount of time needed to develop a matching gift strategy, start small.



The amount of time necessary for optimizing your strategy is minuscule compared to the amount of matching gifts you could be receiving.



All it takes is 3 hours a month.

Matching gifts are not a one-and-done sort of deal. Rather, you need to constantly develop your strategy. Each month, return to these core components, and add on as you see fit:

- Which donors are eligible but haven't submitted their matches yet? Reach out and drive these matches to completion.
- What are the top companies where your donors work that don't have matching gift programs? Initiate a conversation with them.
- How can you foster deeper relationships with companies that have several donors who have submitted matching gifts to your organization?

Once you've fallen into a routine of consistently evaluating and improving your strategy, urge your leadership to do the same. The more time you spend thinking about matching gifts, the more refined and effective your strategies will be.

Have meetings with leadership.

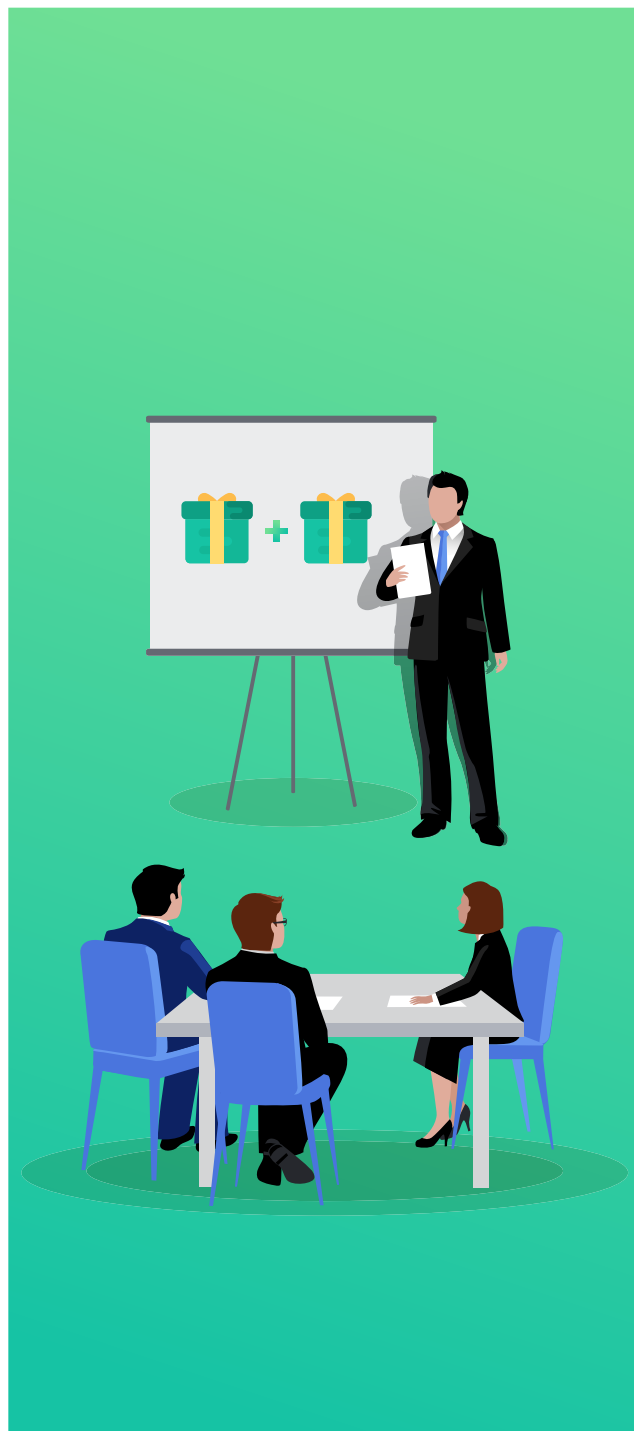


15 MINUTE-LONG MEETINGS

are all you need to get your message across. By respecting leadership’s time, they’ll be much more likely to line up a meeting in the first place, even if they’re uncertain or misinformed about your organization’s matching gift potential.

However, you have to make sure you effectively convey your message and generate a sense of urgency in that limited time period. After all, they’re taking time out of their busy days to meet with you, so make it count.

When planning for these meetings, take an education-based approach, because chances are, your leadership has minimal (if any) **knowledge of matching gifts**. Develop a presentation that spells out the basics and then looks at the long-term influence and expectations for your own organization. You’ll want to



prepare actionable talking points to facilitate effective conversations.

For example, what's your organization's existing matching gift revenue compared to its true matching gift potential? Leverage the idea that between 5-10% of individual contributions are matching gift eligible, meaning you can substantially stretch donors' dollars and improve retention. You can also use what other organizations are doing as a benchmark. This can help you make the case for matching gifts, from a best practice standpoint. **Ultimately, you should harp on the benefits of matching gifts, so you can rally up support sooner rather than later.**

After completing the initial one-on-one meetings, join quarterly meetings to keep the conversation going. You can provide updates on impact and matching gift growth within your nonprofit. Then, lead into ways your leadership (and organization as a whole) can improve its efforts. This could be anything from [developing your marketing strategy](#) to improving data collection.

For instance, a great way to convey growth is by identifying top matching gift opportunities in addition to incomplete matches, and then tallying up the total amount of revenue. **Numbers speak volumes and can serve as an effective incentive for pursuing these opportunities.**



Securing Staff Support

Once you have leadership on board, you can transition your efforts to target the entire staff. Fostering a culture and mindset of matching gifts throughout your organization requires time and effort, but the results are undoubtedly worth it.

Leadership will need to take a proactive approach when spreading the word to team members. Otherwise, you won't build enough momentum to fulfill your potential.

Start by determining which specific staff roles to target in order to build momentum around matching gifts. Then, you can build your efforts out from there. Depending on your approach, tailor your efforts to target:

- **Individuals Heading Campaigns and Events.**

Present the potential matching gift revenue you're facing with specific fundraisers. This way, they'll be sure to advertise matching gifts across their communications with attendees.

- **The Finance Team.**

To maintain accurate data, your finance team will need to track and report on matching gifts. From the total matching gift revenue to match-eligible companies within your system, you can pinpoint areas where you're falling short with your finance team's assistance. Read on to learn about KPIs they should track.

- **The Marketing Team.**

Marketing matching gifts across all communications maximizes visibility. Your marketing team is consistently conducting outreach, so ensure that those individuals are aware of the benefits that come with matching gifts. From direct mail to emails to social media, they'll be much more likely to incorporate effective appeals in their outreach to donors when they understand the potential benefits.

As with any strategy, tailor your approach to your own organization's structure and

needs. For instance, higher education institutions will need their advancement team on board while some nonprofits may need support from their IT team.

By getting these individuals motivated for corporate giving, you'll at least begin to generate some buzz around matching gifts. Let's take a look at specific strategies for doing so:

Educate them via resources.



Creating resources on matching gifts can generate long-term value for your organization. Better yet, save some time by using **these resources** developed by the experts at Double the Donation.

You can disperse these throughout your organization to quickly spread the word. When you put the information right in front of staff, they'll be more likely to engage than if you urged them to conduct their own research. Plus, when they're well-versed on the ins-and-outs of matching gifts, they'll be able to answer any questions donors may have.

Incorporate matching gifts into onboarding.



As you refine your strategies, begin training new employees on **the matching gift process**. This way, they'll be educated from the get-go. Refresh your memory and feel free to the following steps with your team as an introduction to the process:

Matching Gift Process

STEP: 1



Individual donates to a nonprofit

STEP: 2



Individual checks eligibility for a company gift match

STEP: 3



Individual submits a request for a gift match

STEP: 4



Company reviews the match request

STEP: 5



Company matches the donation

Depending on your own organization, here are just a few options for getting staff members up-to-speed on matching gifts:



One-Pagers

Explain the process of matching gifts and display some key data to drive your points home. This gives new employees (as well as current ones) a document to reference throughout their time at your organization.



Calls or Meetings

Speaking one-on-one allows staff members to ask any questions they may have. Make sure you (or whoever is conducting the training) is well-versed on matching gifts prior to the call or meeting.



Webinars

Some individuals learn better with a hybrid approach. That is, they prefer presentations that are accompanied by visuals. A webinar is a great way to reach these team members and ensure they're confident in their matching gift knowledge.

The above are only a few suggestions for adding matching gifts to your training. Adjust your approach depending on the team members to produce the greatest results.

Remember, educating staff is only half the battle. The other half is ensuring they **implement the best practices**. By developing specific matching gift training, you can accomplish both of these crucial tasks as quickly as possible.

Improving the Process

As you've learned, developing an effective strategy is not a one-and-done deal. Rather, it's an ongoing process. As time passes, you'll need to refine your efforts in order to acquire optimal results and maintain support. To aid you in the process, consider the following key ideas:

Create a matching gift team.

One of the best ways to generate support is to give individuals personal responsibility in growing your strategies. Instead of relying on every individual to develop their own approach, assign specific individuals to a matching gift team. The more individuals you get involved, the greater the opportunities. You'll gain a range of perspectives and can optimize your approach to the fullest extent.

However, don't overload the team with too many members. Rather, take representatives from across the entire organization and consolidate them into one group. Then, task them with the following responsibilities:

- Develop a matching gift plan.
- Determine a budget for matching gift outreach.
- Evaluate marketing opportunities.
- Determine information to provide to donors.
- Evaluate reported metrics.

These are just a handful of the responsibilities you should assign to your matching gift team and should serve as a great starting point. As your experience grows, allow the team to adapt its approach. Encouraging select team members to become experts in matching gifts helps you extend your reach in as little time as possible.

Standardize the process organization-wide.



Your organization's structure plays a crucial role when creating buy-in. The larger your organization, the more difficult it becomes to get and keep everyone engaged—especially when you're dealing with multiple chapters.

To start, decide on the process you wish to use. Then, reach out to staff to implement the plan across the board. This ensures there are no gaps in your strategies. To advance your efforts, present matching gifts as an untapped revenue source from donations you're already receiving.





**Data to Share
With Your Team**

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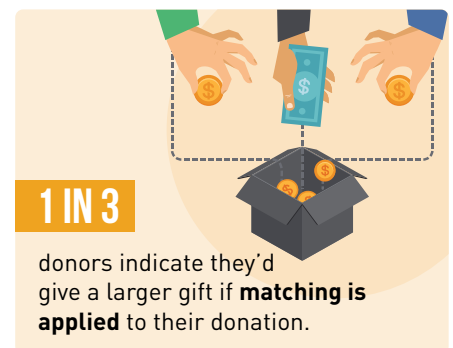
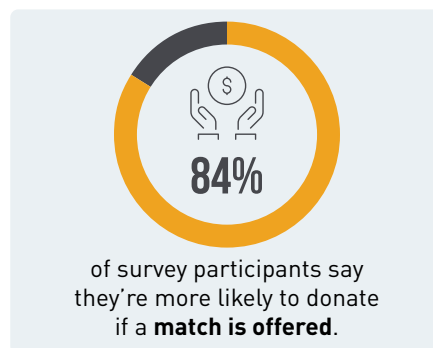
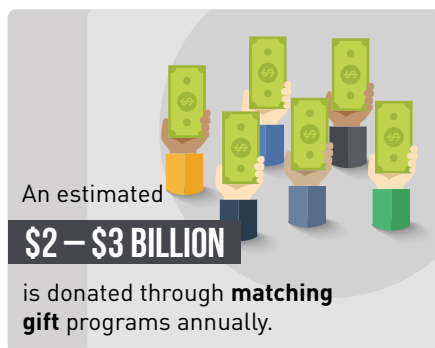
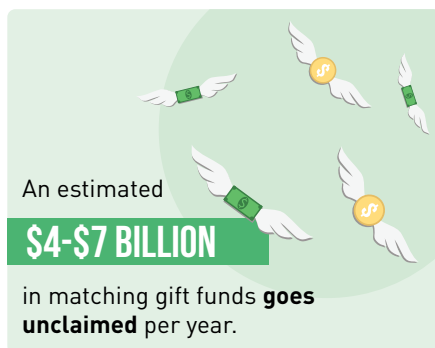
Nothing speaks louder than numbers. Presenting the benefits of matching gifts may not be enough to get staff and leadership on board *unless* you have data to back up your claims. Let's take a look at some of the data you can share with your team in order to get them on board with matching gifts.

General Matching Gift Data

As you get started developing your strategy, you may not be tracking organization-specific data. While specific KPIs will make the largest impact, you can illustrate the bigger picture with general data.

Put the following statistics in front of team members to shed light on the untapped potential that matching gifts present:

Key Matching Gift Statistics:



Promoting Matching Gifts



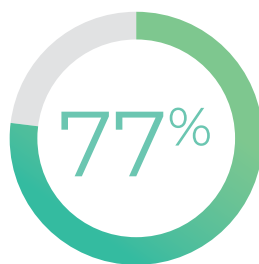
Sending matching gift reminder emails within 24 hours of a donation results in a



open rate, which is **2-3 times higher** than the average nonprofit email open rate.

Double the Donation Database Analysis and Projections, 2019

Employing multiple approaches to identifying match-eligible donors results in



more identified match-eligible donations.

Source: Double the Donation Database Analysis and Projections, 2018

Data Nonprofits Should Consider

Sure, the above statistics are great for conveying the bigger picture of matching gifts, *but what about your own organization?* What do you stand to gain? How can you pinpoint exact numbers when you're unsure of where to start?

When refining your strategies, there is a variety of data you should track. Track these 8 key metrics and put them in front of your team to create buy-in:

1. The number of matching donations
2. Total revenue raised from matched donations
3. The number of match-eligible donors from this year who did not submit
4. The value of the matching gifts for this year's donors who did not submit
5. The number of match-eligible donors from last year who did not submit
6. The value of the matching gifts for last year's donors who did not submit
7. Percentage of donations that included matched donations
8. Percentage of total revenue raised from matched donations

No matter where you are in building your processes, data can help you build a case for increasing your organization's focus on matching gifts. With overviews of your data, your organization will quickly be able to see where you're succeeding and where you have room for improvement.

Conveying the significance of matching gifts can be difficult, but displaying specific data (especially in a visual format) may be just what you need to get leadership on board.

Pro Tip: Tracking data can be difficult, but you need to know where you currently stand in order to optimize your strategies. Use software like **360MatchPro** to automate the process.



Concluding Thoughts

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We hope that you've found the information within this guide insightful and helpful in creating buy-in for matching gifts. Corporate giving—matching gifts especially—represents a major revenue opportunity for organizations. **The point that defines success is whether or not you ignite organization-wide motivation.**

Sparking team-wide engagement is no easy feat, though. Many nonprofit professionals don't quite see its value and may even consider it a waste of time due to wide-spread misinformation. Because of this, advocating for a cultural shift in mindset to matching gifts requires a hands-on plan of attack.

Whether you take a top-down approach or a bottom-up approach, make sure you're emphasizing the benefits of matching gifts, made easier with data. By expressing enthusiasm and leveraging the tips presented in this guide, you'll start to gain traction and boost awareness across your organization. With a bit of persistence, you'll generate the support you need to maximize your revenue potential in no time!





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matching gifts made easy

About Double the Donation

About Double the Donation

At **Double the Donation**, our mission is to help nonprofits increase fundraising from corporate giving programs. Our services make receiving matching gifts and volunteer grants quick and easy. By partnering with our expert team, nonprofit organizations can focus on what's truly important: serving their core missions—whether that's education, community enrichment, scientific research, or charitable giving.

Author: Adam Weinger



Adam Weinger is one of the leading experts on corporate giving programs.

He's the president of Double the Donation, a company that helps organizations raise more money from employee matching gift and volunteer grant programs. The company partners with nonprofits of all shapes and sizes, including arts and cultural organizations, hospitals, educational institutions, and community-based organizations.

See how **Double the Donation** can help your organization simplify the matching gift process.

Try Us Risk-Free!

