



Double *the* Donation
matching gifts made easy



Improving The Donor Journey with Matching Gifts

A strategic guide for creating a positive experience for matching gift donors



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Introduction

Introduction

Matching gifts have the power to transform your nonprofit's fundraising strategy, whether you're just getting started with fundraising or you're already well-established in the space. They're a great way to boost funds and spark donor engagement. After all, why wouldn't donors want to double or even triple their philanthropic impact without reaching back into their own pockets?

Well, to start, donors face seemingly insurmountable barriers, which can substantially demotivate them. Commonly, donors encounter a general lack of knowledge. This often includes figuring out where they can find their employers' guidelines and how they can determine their eligibility from there. These obstacles become considerably more challenging if your staff doesn't have the necessary **matching gift knowledge** to fill in the gaps for donors (or simply doesn't make a conscious effort in **promoting the opportunity**).

Overall, the answer is simple: nonprofits don't optimize the *entire* donor experience.

Often, nonprofits focus only on the processing side of the donor experience, not the donor journey itself. However, the journey plays a major role in whether or not you secure the match. Even if it does expand their impact, why would a donor go through the hassle of completing a match if they have to blindly navigate the process with little-to-no guidance?



In order to ignite motivation in match-eligible donors, you need to get rid of the outside perspective and focus on their point of view.



That is, what does their journey look like? Do they understand the matching gift process? Is your nonprofit giving them all the resources they need to complete their matches, or are they unsure of what all they need to do?

These are the questions your nonprofit should already be thinking about, and if you're not, it's about time you do.

In this guide, we'll take a look at how exactly you can improve the donor journey with matching gifts. Prioritizing their experience is the *only* surefire way to secure the maximum amount of matches possible, after all. By making sure your donors feel valued, they'll be much more motivated to complete the match process.

From the initial donation to follow-up, your team needs to streamline the donor journey with matching gifts. Doing so is crucial to fulfilling your matching gift potential. In this document, we'll cover the exact steps for accomplishing this. Together, we'll create a bulletproof plan for securing your portion of the **\$4-7 billion in matching gift funds** that goes unclaimed each year.

Let's get started!

The Matching Gift Lifecycle



A hand is shown dropping a one-dollar bill into a glass jar. The jar is filled with several other one-dollar bills, and the entire scene is overlaid with a semi-transparent teal filter. The background is a plain, light-colored surface.

**Step 1:
A Donor Makes
a Gift.**

Step 1: A Donor Makes a Gift.

The moment a prospect decides to make a philanthropic impact on your cause is the moment the donor journey begins. Neglecting to take charge of matching gifts from the start creates poor motivation for the rest of the process for everyone involved.

To learn how to effectively build up (and maintain) donors' momentum, let's dive into the immediate next steps for your team to take after a gift is made.

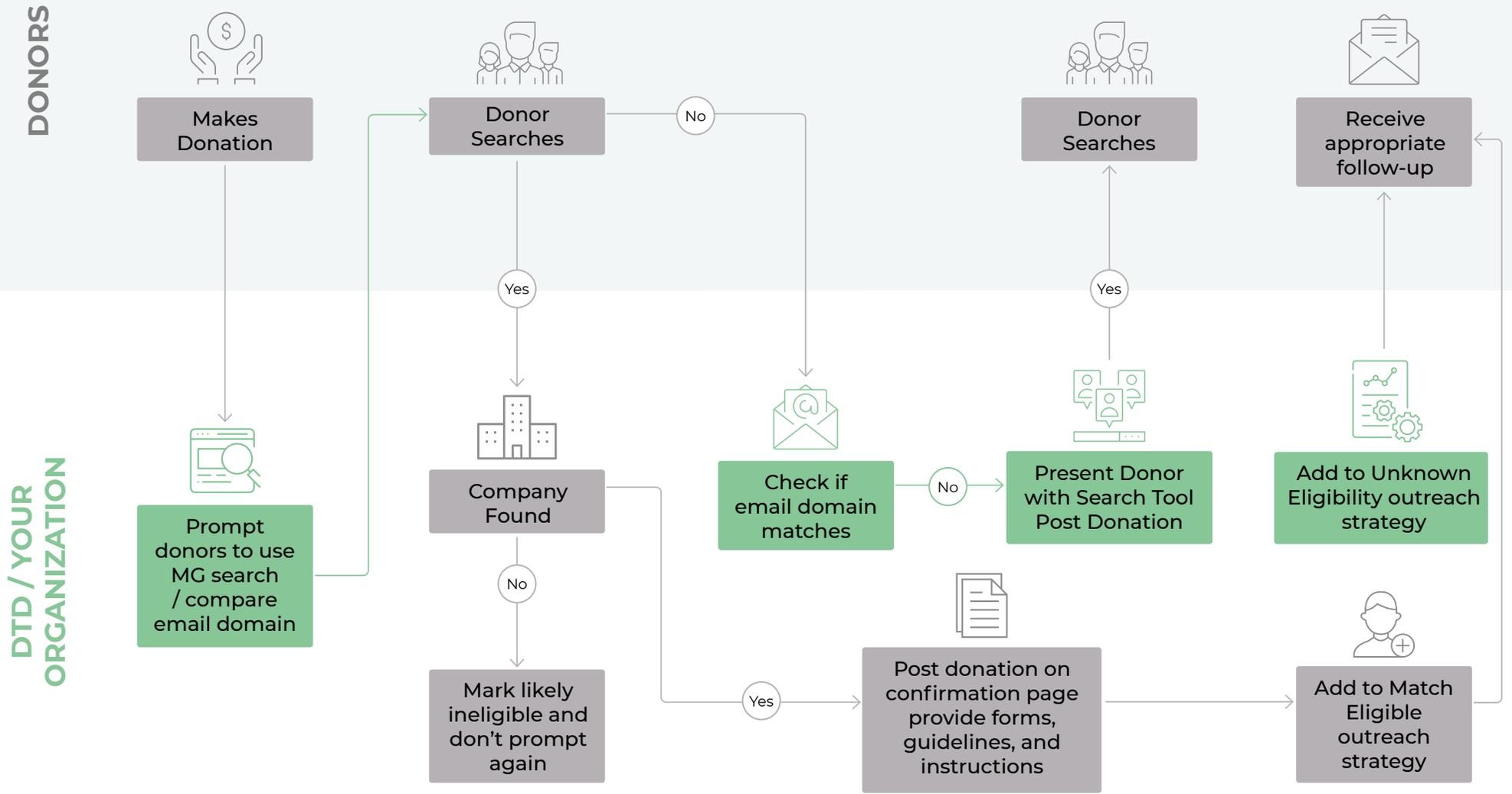
Consider the Online and Offline Donation Processes

Organizations of all sizes have multiple revenue streams. Each comes with a unique experience, but overall, each donation method can be divided into two main categories: online and offline.

For your team to be well-equipped in guiding donors through the matching gift process, you'll need to understand each perspective in full. Let's take a look at the process flow for an online match-eligible donor compared to that of an offline match-eligible donor. We'll provide some key takeaways below.

PROCESS FLOW: ONLINE DONOR EXPERIENCE

(Offline Experience is Similar)



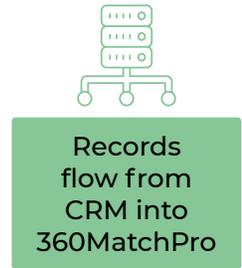
● Multiple opportunities to use Double the Donation's tools to identify and log match eligibility

PROCESS FLOW: OFFLINE DONOR EXPERIENCE

DONORS



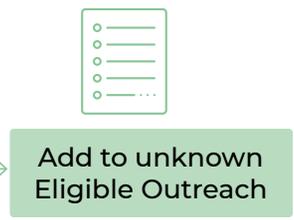
DTD / YOUR ORGANIZATION



Yes



No



These processes are somewhat complex, so let's take a look at a few crucial takeaways:

- During the online experience, the donor is prompted to research their eligibility at the time of making a donation.
- The offline experience requires manual data entry in your CRM, while employer data flows automatically into Double the Donation's tools.
- In both processes, Double the Donation's tools streamline the research process and provide you with unique outreach strategies.

While most online donations occur through your digital donation form, there are several avenues which offline donors use to contribute. Because of this, you should be prepared with an actionable plan for efficiently incorporating matching gifts in your existing offline processes. For instance, your team may want to:

- Create inserts for your direct mail campaigns.
- Highlight matching gifts in major and planned giving conversations.

While the bulk of your donations may come from online avenues, offline support is just as crucial to your organization's success. By doing everything you can to increase awareness among *all* donors, you'll be much more likely to secure the support you need.

Determine Eligibility

Considering that **84% of donors say they're more likely to donate if a match is offered**, donors should be able to research their eligibility *prior* to hitting submit. If you've invested in an employer search tool like **Double the Donation**, your donation

process is an opportune momentum to make use of it. After all, making a gift is when donor engagement is at its peak, so you'll want to do everything you can to **proactively market matching gifts** at this time.

As soon as your donor submits a donation, they should be greeted with more helpful resources to determine their eligibility. This could be anything from a helpful overview of matching gift programs to step-by-step instructions. Simply updating the confirmation screen to reference matching gifts can drive results for your team. Take a look at this example from the Cat Rescue Club:

About 360MatchPro | Dedicated Matching Gift Page



CAT RESCUE CLUB

DONATE TODAY

THANK YOU FOR DONATING!

(You may be able to make your donation go twice as far with matching gift)

Thank you for your donation

See if your employer will match your donation!

LET'S CHECK

All information provided by

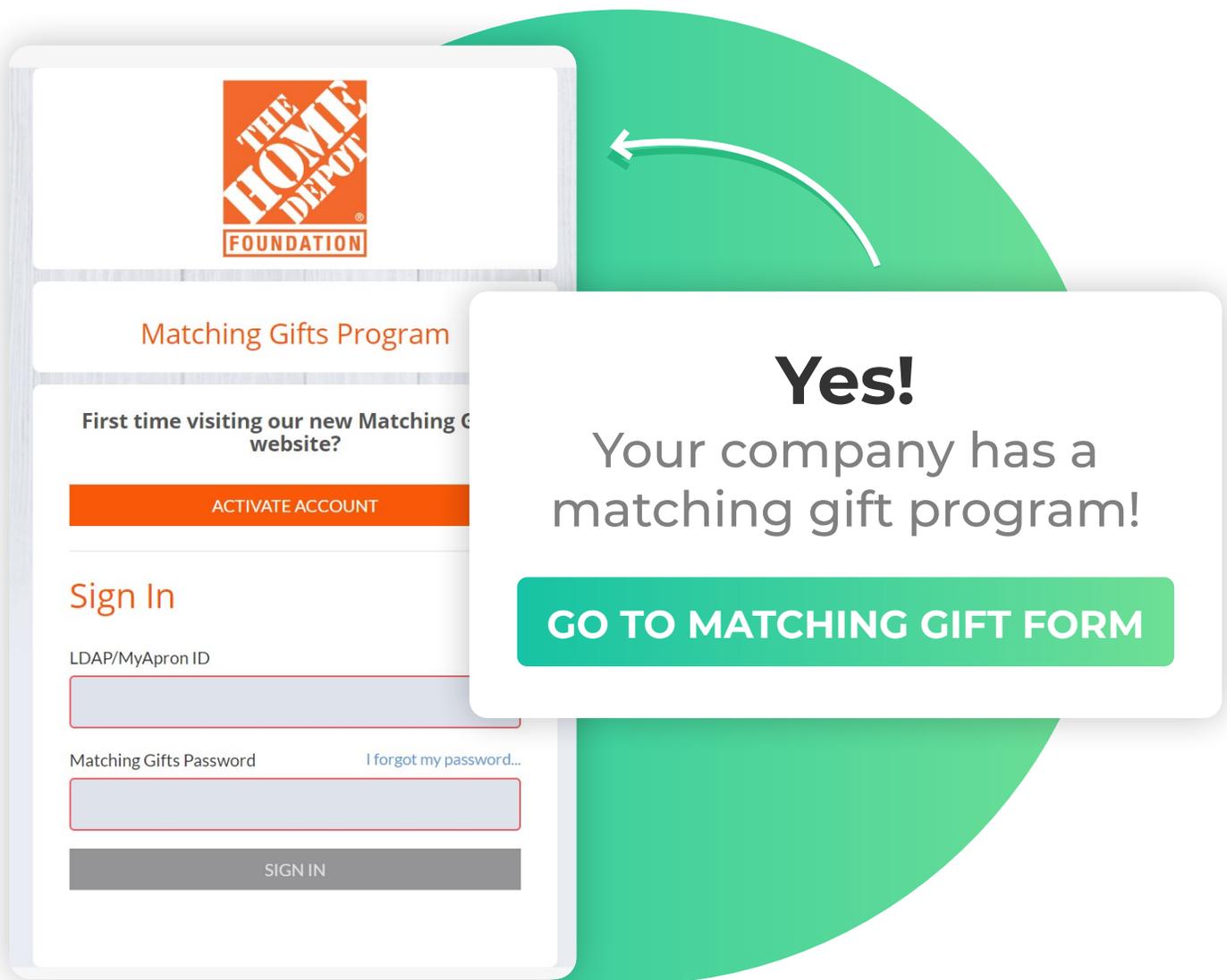


Double the Donation
matching gifts made easy

i Payment Complete: Thank you for your donation.

Without a dedicated tool directly embedded in your website, donors will be forced to research their employers' match programs on their own. Ultimately, this will only send them away from your site which interrupts the donation process. This can be detrimental, because prospects are much more likely to get distracted and forget about completing their donation. Plus, locating guidelines can be a hassle for donors, leaving them frustrated if they're not given some sort of guidance.

To help, add a streamlined search tool on the donation form and then also present all the forms, guidelines, and instructions post-donation. By giving them exactly what they need to research their eligibility, they'll be much more likely to do so.



Donors who are unsure of the matching gift process altogether may need a bit more guidance. That is, your team may need to determine their eligibility for them. Smaller organizations may benefit from researching with a dedicated search tool, but researching every donor's eligibility may be out of reach for many nonprofits. This is where email domain screening comes in handy.

With the assistance of a **robust matching gift platform**, your data will flow seamlessly into your match identification system the moment a donor submits their gift. Take this data and use it to evolve your follow-up messaging. For instance, you can screen donors based on email domains to identify more match-eligible donors. This can result in a **1% increase in total revenue!**

Then, streamline the process even further with automation, so no matching gift prospects go unnoticed. Offline donations will still need to be put in manually, but the less manual labor, the better!

Especially for larger organizations, automated identification can substantially boost your efforts and ensure that you're cultivating relationships with all match-eligible donors, regardless of how they donated.

Take the Leukemia & Lymphoma Society for example. With **360MatchPro by Double the Donation**, they've grown their matching gift revenue by over \$3.4 million!



Step 2: The Nonprofit Conducts Outreach.

Step 2: The Nonprofit Conducts Outreach.

In the nonprofit sector, time means everything. To maximize the use of your team's time, create guidelines surrounding *which* donors receive *what* outreach at *what* time. Here's what we suggest for each (and remember to adjust based on your organization's needs).

Follow-Up Emails

Thanks to robust matching gift tools, email outreach is automated. In other words, *every single one of your donors should be receiving follow up emails encouraging them to research their eligibility.*



Set up a consistent follow-up schedule to let donors know you truly care about them completing the process. So you can understand the type of schedule your team should implement, let's take a look at **360MatchPro's** automated follow-up procedures:

- a. Donors whose eligibility cannot be determined** are sent an email prompting them to search their employer using the search tool. Our automated emails have a tracking code that captures the search results and updates your database. Donors in this category receive *one follow-up email*.
- b. Donors who are identified via the search tool or via email screening** receive *three reminder emails*. By default, these emails are sent out:
 - i. Immediately after the donation is made
 - ii. 3 days after the donation is made
 - iii One month after the donation is made

By implementing some sort of follow-up schedule like the one indicated above, your team will effectively show your match-eligible donors how much you appreciate their additional support. If you don't have software that tracks this information, determine which segment of your donor base would best benefit from follow-up messaging based on existing data and available team time.

For the best results, send a dedicated email that clearly highlights that a donor's gift may be eligible to be doubled. Keep in mind that a simple reminder can go a long way when it comes to cultivation. Take a look at this eye-catching email from the Cat Rescue Club:



CAT RESCUE CLUB



**YOUR DONATION

COULD BE DOUBLED**

XENA AND GABRIELLE, Cat Rescue Club's First Adoptions

Dear Erin,

We are excited to let you know that your donation of \$100 is eligible for a matching gift from The Home Depot!

It's easy to submit a matching gift request. For your convenience, please see the below instructions and documentation to submit a matching gift request.

Step 1: Click here to start the matching gift submission process! [Click here](#)

Once you've submitted your matching gift request, please click the following link to let us know.

Step 2: I've submitted my matching gift request! [Click here](#)

If your company doesn't offer a matching gift program or won't match you donation we'd appreciate knowing that too, just click the following link:

[My donation is not eligible for the matching gift.](#)

Thank you again for your support.

Regards,
Matching Gift Team

Phone Calls



Human-to-human interaction is more meaningful than an email. With this type of outreach, you should be more selective. It takes only a few minutes to type up an email (and no time at all with an automated reminder system), but a phone call will take up several minutes of your team's time—several minutes that could be better spent cultivating relationships with high-value matching gift donors.

To narrow down your list, only call those who are strong prospects. Doing this enables your team to:

- Communicate on a deeper level and develop relationships with high-value donors.
- Provide assistance to those who may be confused about the matching gift process.
- Conduct quick follow-up with donors who are much more likely to submit matches.

As you get started, you may wonder how exactly to determine which donors your team should reach out to and which should only receive automated communications. To aid in the selection process, create criteria such as the following:

- **Minimum donation amount**

What do you consider to be the minimum valuable donation amount to follow up on? Many organizations set a minimum donation of \$50 before they reach out, but this varies widely from organization to organization. Either choose to set this minimum based on the donation amount or the match amount since different employers offer different match ratios.

- **Donor Eligibility**

Are you able to determine if their employer offers a matching gift program? Further, are they eligible for their employer's program? If not, it may not be worth your organization's time to chase the match.

- **Nonprofit Eligibility**

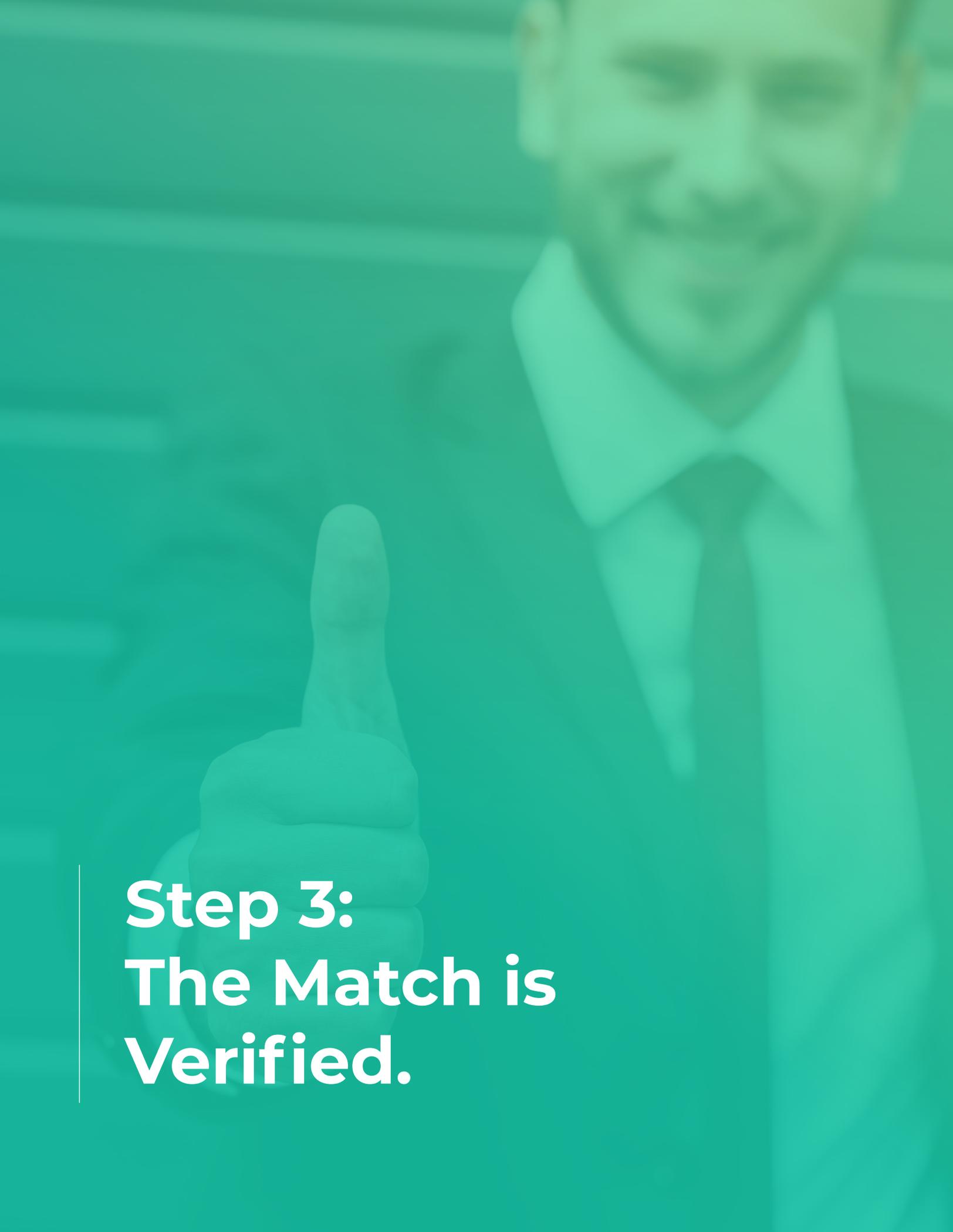
Is your nonprofit eligible for the employer's program? If not, take note for future reference and spend time cultivating other strong match-eligible prospects. This way, you don't waste time reaching out to donors whose employers won't match donations made to your organization.

So that you have an actionable example to follow, let's look into some sample data from the Leukemia & Lymphoma Society. They set specific requirements for reaching out via phone call, which included a minimum donation amount and the organization's eligibility for employers' matching gift programs.

After applying a \$250 minimum threshold to all donations, their list of 2,300 donors was brought down to 240. After applying some additional criteria concerning their organization's eligibility, the number of potential match-eligible donations was brought down to 217. In other words, they reached out to a *fraction* of the original donors by locating their top available matches and ensuring they didn't spend time chasing nonexistent opportunities.

Once you've put criteria like that in place, your team will need to prepare for the outbound calls. A script is a fantastic way to accomplish this! If you're already doing follow-up outreach to select donors, it could be as easy as asking them if they have any questions about the matching gift process. A simple question may be all you need to initiate a conversation with some donors!

While all matching gift donors are important, it can be worthwhile going the extra mile to express appreciation to those who contribute substantially more than others.

A man in a suit and tie is shown from the chest up, smiling slightly. He is pointing his right index finger upwards. The entire image has a teal overlay.

**Step 3:
The Match is
Verified.**

Step 3: The Match is Verified.

While the most challenging part of securing matching gift funds is encouraging donors to complete the process, don't forget about your nonprofit's role. After a donor completes a matching gift request, a substantial portion of the responsibility is shifted over to your team.

It's up to you to drive the verification process to completion, so your donors' hard work to submit their matches doesn't go to waste.

This may seem like a simple step. After all, all your team needs to do is tell the company, "Yes, your employee did in fact make a donation to our organization, and we meet your company's eligibility requirements." However, *verification is easier said than done*.

Whether it's managing thousands of portal logins or allocating matches back to donors, the verification process can be tricky. However, it's a *vital* step in the match process, and if your team doesn't understand it in full, it can disrupt the process for donors. Ultimately, this may mean the difference in whether or not you actually secure the funds.

If you don't have set processes in place around matching gift verification, it might be time to consider creating some. Streamlining your verification process means you'll be able to verify gifts more quickly, which creates a better overall donor experience.

A great place to start is by familiarizing yourself with the corporate giving platforms you may encounter during verification. Many companies outsource their matching gift programs to these third-party software providers. There are about 10 major corporate giving platforms that work with corporations, and organizations must use these portals to verify the donations and disbursement of funds.

Since you'll be dealing directly with these vendors, it's important to understand the requirements for each. Let's take a closer look at 3 of the most widely-used platforms:

	Benevity	YourCause	CyberGrants
Verification Required?	Rarely	Typically	Typically
Verification Deadline	N/A	N/A	Typically 30-60 Days
Payment Options	ACH or Check	ACH or Check	ACH or Check
Volunteer Grants & Employee Giving	Centralized	Program-Specific	Program-Specific

While this part of the process depends substantially on your team, there is a way you can improve the donor’s perspective. You should give them every piece of information and form they need, whether that’s through helpful resources or through one-on-one conversations.

Make sure your team is up-to-speed on the guidelines for each major vendor. Your dedicated matching gift page can be as much of a resource for staff as it is for donors—especially if you have a search tool at your disposal. For one, this ensures you won’t overlook a single matching gift dollar. It also enables you to quickly answer donors’ questions about these systems as they arise. When your team can help them navigate any obstacles they’ve encountered, they won’t feel as though they’ve been left to fend for themselves.

Whatever you do, do not forget to verify the gift. This is the final step before receiving a check, and the last thing you want to do is slip up and miss out on the match! Fortunately, more and more companies are moving to matching gift processes that don’t require nonprofit verification!

Best Practice: Present matching gift information immediately after a donation is made on the donation confirmation screen and via separate matching gift email.



**Step 4:
Define the Post
Matching Gift
Process.**

Step 4: Define the Post Matching Gift Process.

So you've secured the match and received the check. Great! The process doesn't end here though. Remember, it's a *lifecycle*, so it's an ongoing process.

You've done all you can to streamline the process for matching gift donors, and they'll appreciate it. However, you need to stay front of mind if you plan on continuing to secure these funds. Cultivation is the final piece to the puzzle, so don't leave it up to chance. Instead, define the post matching gift process for your organization.

While the key is revenue growth, defining your post matching gift process can take your strategies to the next level. It's important to note that this is entirely optional but can prove beneficial over time.

Whether post-matching-gift outreach is done upon verification or after the check is received differs between organizations and depends on your unique needs. Define the optimal time for your organization, so you'll be consistent and not let anything fall through the cracks. Let's take a look at a few common elements of any effective post matching gift strategy.

Thank Your Donors.

This should go without saying, but it bears repeating: *always thank your donors—especially your matching gift donors!*

Today's technology enables automated communication, meaning your team doesn't have to do anything more than customize a template to express gratitude for a match. For your high-value matching gift donors, you'll want to manually reach out to say thank you though. **After all, nothing replaces the authenticity of personalized outreach.**

Every dollar counts, but manual outreach for all matching gift donors simply isn't feasible for most organizations. What constitutes a high-value matching gift donor varies from organization to organization, so you'll first need to determine the threshold for your nonprofit, whether it's \$50, \$500, or \$5,000. This will make it much easier to organize communications and determine which matching gift donors will receive manual outreach and which will receive automated emails.

Outreach for high-level donors could come from the Executive Director (ED), a Director of Development or relevant program the donor contributed to, a Board member, or other senior leadership staff. The acknowledgments they could use to effectively convey gratitude may include:



**Handwritten
Letters**



**Personalized
Emails**



Phone Calls



Postcards

Depending on your team's processes and availability, you could all go out or select a combination of a couple acknowledgement techniques.

In any case, remember that people want to be thanked in the way they gave.

Whether it's through direct mail or online, make sure to proactively contact them the same way they donated. They'll recognize and appreciate the fact that you're taking their preferences into account.

Send Well-Timed Solicitation.

Sending **matching gift solicitation during special dates** often produces results.



Well-timed communication can serve as a simple yet powerful reminder for many donors.



To help determine the best dates for your organization, keep in mind that matching gift deadlines usually fall under one of two types:

- 1. Within a set number of months** — A company may choose to stipulate how many months it will fulfill a match up to. For instance, this could be 3, 6, or even 12 months following the initial donation.
- 2. By the end of the calendar year** — Employees must submit their match request within the same calendar year that the donation is made. Some companies may offer an extended grace period of one or two months.

At **Double the Donation**, we recommend that you conduct this outreach as soon as possible. Around 95% of our clients send the first matching gift message within 24 hours, then follow-up within 7 days. Automating communication and follow-up in a timely manner is crucial.

An additional period to conduct outreach is toward **the end of the year**. Many company submission deadlines are around this time, and creating a dedicated strategy for mass outreach can encourage donors to submit their requests.

This is an optimal time to connect with donors, and **360MatchPro** makes it easy to send simple (yet effective) reminders with the **end-of-year email stream**. When you enable the automated stream, one end-of-year email will be sent to donors who fulfill the following criteria:

- 1.** The donor identified that they work for a company with a matching gift program.
- 2.** The donor hasn't identified that they've submitted a matching gift request.
- 3.** The donation was made between January 1st and November 30th of the current year.

Best of all, it honors the email blacklist, sending limits, and company exclusions.

All you need to do is enable it and select a date for the emails to be triggered. This eliminates the need for manual outreach and delivers value directly to match-eligible donors.

End-of-Year Email Template **BETA**

Disabled

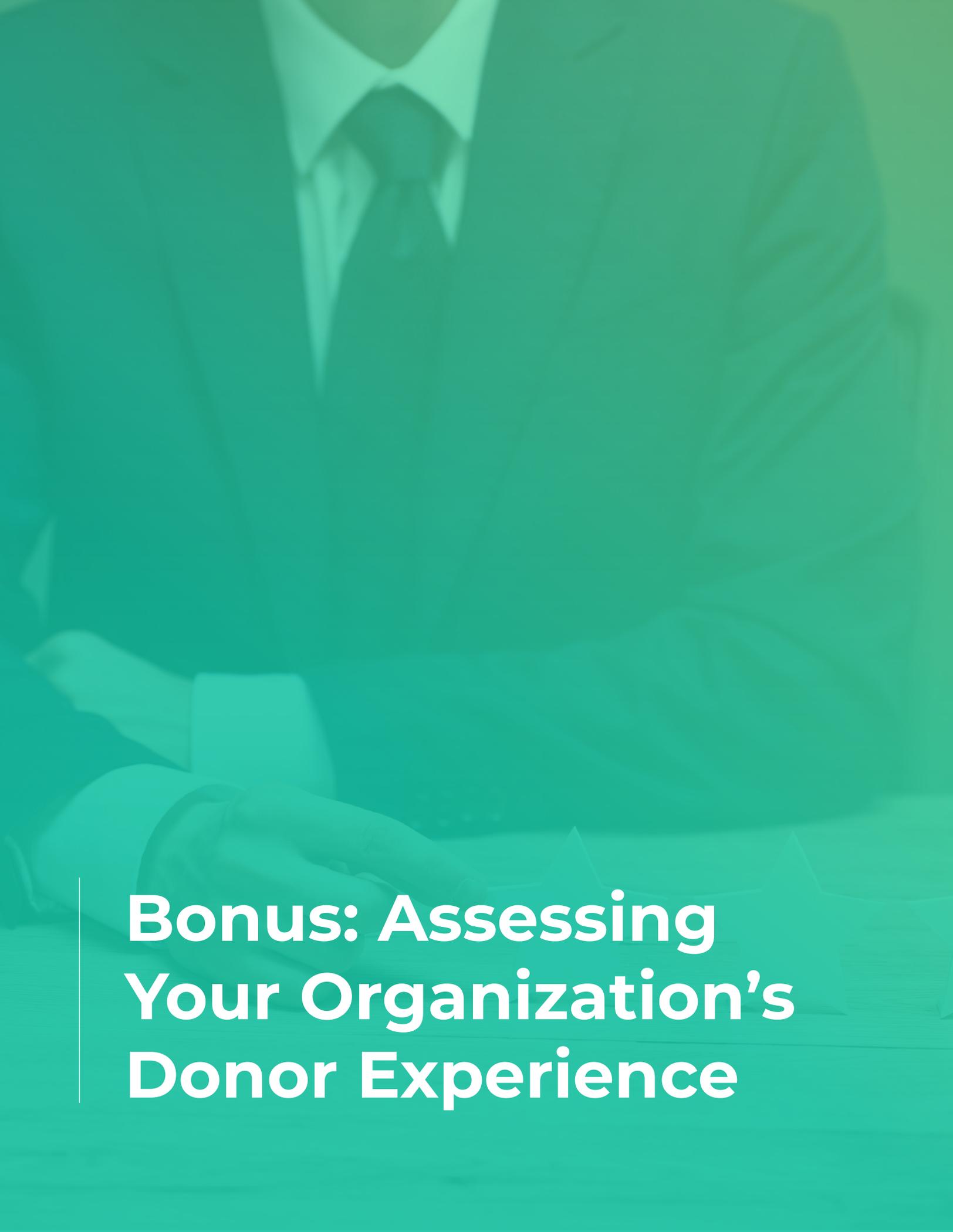
Send this email on December ▼

Currently, **0** donations are eligible for an end of year email.

Bonus Idea: To hone in on your high-value donors, ask your matching gift coordinator to focus on your top 25 matching gift opportunities. Then, conduct targeted outbound calling in order to launch you toward your year-end goals. Remember, a simple reminder can go a long way.

Time permitted, you can expand your organization-wide solicitation beyond year-end. Consider other events, drives, or funds your organization has throughout the year. Then, try adding matching gift language prior to, during, or after these events as well.

When experimenting, if you see a lift using one particular tactic, this might incentivize your team to put out solicitations during other key times.



**Bonus: Assessing
Your Organization's
Donor Experience**

Bonus:

Assessing Your Organization's Donor Experience

So you've outlined your entire donor journey. You're pretty confident that the experience is positive and effectively encourages matching gift donors to submit matches again, but how do you know for sure?

Determining where there's dropoff in the process can point to areas of improvement in the donor journey. Let's take a look at a few actionable steps for doing so, so your team can easily refine the donor journey with matching gifts.

Designate a Matching Gift Owner at Your Organization.

If you haven't already designated a staff member who owns matching gifts, consider assigning one to take care of all your organization's matching gift needs.



This individual should be in charge of the entire process, including all outreach. Task them with conducting appropriate follow up and gathering feedback. Once they've gathered this input, don't just let that information sit there! *Do something with it!*

Having someone responsible for this enables you to act on the feedback your donors provide, and implementing the suggested changes conveys to matching gift donors that your team values them.

Best Practice: Not only should this individual be fully educated on the matching gift process, but they should also understand how to navigate your matching gift database and automation tools.

Assess Your Website's Matching Gift Visibility.



Online fundraising is ever-growing and is increasingly important for nonprofits across the board. In other words, your website serves as a fantastic resource for promoting matching gifts!

Attempt to take the view of the average user who may be curious about matching gifts. Then, walk through your website. Specifically, you'll want to assess the degree of matching gift visibility by asking yourself the following questions:

- Do you have a dedicated matching gift page?
- Is your matching gift page visible in your navigation?
- Is your matching gift page easily found via the search feature?
- Do you have information about matching gifts on your Ways to Give page?
- Do you have a matching gift search tool embedded above the fold on your matching gift page?
- Are you giving donors step-by-step instructions for completing their match requests?

By increasing visibility across your website, you'll increase awareness as a whole and improve the likelihood that match-eligible donors will complete their matches.

Best Practice: If you're unsure of where to start in this process, go through the above steps for other organizations' websites. Compare their matching gift visibility with yours, so you can refine your strategy and improve the donor journey all-around.

Assess Your Online and Offline Donation Process.



To take your assessment one step further, walk through your donation process step by step. When reviewing your online donation process, answer these questions:

- Are you mentioning matching gifts in your direct mail outreach?
- Are you providing links to your dedicated matching gift page?
- Are you capturing or asking for employer information for offline donations?
- Are you following up with donors via email?
- Are you conducting personalized outreach via phone?

Once you've optimized your offline donation process, shift your focus to the online donation process. Specifically, you'll need to answer the following key questions:

- Is your matching gift tool embedded in your donation page?
- Do you provide your matching gift search tool post-transaction?
- Are you capturing and storing matching gifts based on donor records captured via your search tool?
- Are you following up with donors via email?
- Are you conducting personalized outreach via phone to any of your donors?

Best Practice: Nearly half of all nonprofit website traffic comes from mobile and tablet users. Because of this, you'll want to consider the matching gift process for mobile donors. How much information do they have to rifle through to complete the process? To start, limit text and images on matching gift appeals as much as possible without sacrificing value.

A woman with short dark hair and glasses is shown in profile, looking upwards and to the left with a thoughtful expression, her hand resting on her chin. The background is a solid teal color with several hand-drawn sketches of lightbulbs hanging from thin vertical lines. The sketches are rendered in a light, sketchy style, with some showing the filament and others just the outline. The overall composition is clean and modern, with a focus on the theme of ideas and thought.

Concluding Thoughts

Concluding Thoughts

We hope that you've found the information within this guide insightful and helpful for improving your nonprofit's donor journey. Whether or not your matching gift donor's experience is positive or negative can be the defining factor in whether or not you secure future matches. In fact, *it may even determine if you ever receive a matching gift in the first place.*

Creating a positive experience is easier said than done, though. It takes a full understanding of the matching gift process from start to finish and requires you to put yourself in your donor's shoes. From the moment someone makes a gift to the moment you follow up, your team must proactively prioritize and improve the donor experience.

Above all, remember that donors are the backbone of your organization. If you want to keep them around, you need to do everything you can to optimize their time and support. By leveraging the tips presented in this guide, you'll be off to a great start!

From here, consider these actionable next steps to take back to your team:

Step 1: Consider your current donation processes.

Step 2: Talk about matching gifts with your donors and proactively follow up.

Step 3: Streamline your verification processes.

Step 4: Continue to engage with match-eligible donors outside of solely matching gifts.

Now that you're well-versed in what a positive donor journey looks like with matching gifts, feel free to share your newfound knowledge with your team. Go into it with enthusiasm and you're sure to improve the donor journey in no time!



Double *the* Donation
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.

Regardless of your mission, our team of professionals and our robust matching gift platform will help you to improve the donor experience all-around.

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 **360MatchPro** can improve your organization's donor journey with matching gifts.

[Schedule a Personalized Demo!](#)

