

The Ultimate Guide to Matching Gifts



Double *the* Donation
matching gifts made easy

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



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



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A smiling man in a dark suit, white shirt, and striped tie is holding a large, wrapped gift box with a white ribbon. The background is a blurred crowd of people in business attire. The entire image is overlaid with a semi-transparent teal color. A white rectangular frame is centered on the image, containing the text.

Matching Gift Basics

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



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.



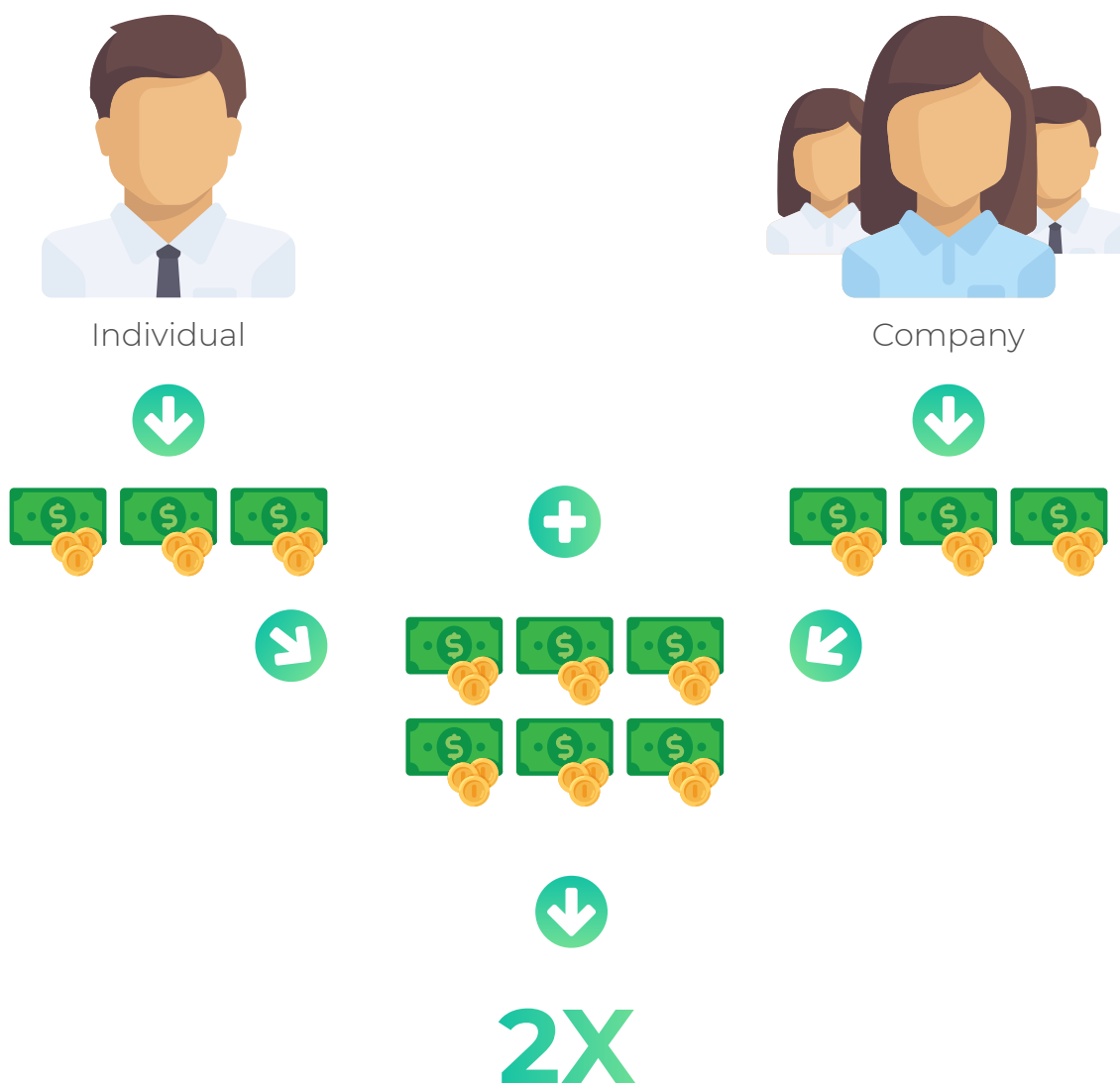
Why do organizations overlook matching gifts?

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

Matching Gift Basics

Matching gifts double the impact of your donors' contributions. Two donations for the work of acquiring one seems too good to be true. It's not. Matching gifts offer 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.



Many donations can be doubled.



**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 from company to company, there are no universal guidelines -- your organization 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 that fall into one or more 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, though many faith-based organizations with major community outreach components are eligible to receive matching gifts.

Ratios & Amounts



The amount that a company will match is based on a combination of their matching gift ratios, minimums and maximums, and the donor's employment status. 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 of an employee's donation to match 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 an additional \$100 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 5:1. Ratios can change based on the employee's level of employment. 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. This maximum is the total amount per year that a company will donate on behalf of one employee.

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.
- Robert Wood Johnson Foundation matches at a 5:1 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 \$5,000 annually per employee.

Minimum Match Examples:

- Harris Corporation matches employee donations greater than \$10.
- LyondellBasell Industries matches employee donations of \$100 or more.



Top Matching Gift Companies

Top Matching Gift Companies

Double the Donation maintains the most extensive database of companies that offer matching gifts. 65% of Fortune 500 companies (plus many others) offer matching gifts, and these are some of the best programs out there.

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



BP British Petroleum

BP offers practically every type of employee giving program BP offers practically every type of employee giving program, including matching gifts. 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, and other peer-to-peer campaigns.



General Electric

In 1954, the GE Foundation created the Corporate Alumni Program, which was the first corporate gift-matching program. The GE Foundation has been known to match over \$42 million in a single year 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 Fund Management

SOROS Fund Management

SOROS Fund Management offers very generous guidelines for their corporate matching gift program. 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, 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

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

ExxonMobil offers a 3:1 match on donations made to educational institutions and a 1:1 match to all arts and cultural organizations.



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 \$10,000 donated per employee and a 50% match on donations from retirees.

Boeing provides \$10 for every 10 hours volunteered up to \$10,000. Employees must volunteer at least 25 hours to qualify for a volunteer grant.



Johnson & Johnson

Johnson & 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.

Johnson & Johnson offers a 2:1 match ratio for current employees with a \$20,000 maximum and a 1:1 match rate for all retirees.



Microsoft

Microsoft has one of the leading employee giving programs. The company and its employees have been known to donate \$156 million in one year 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, they are often 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 raise more money to pursue your mission and do some good for the world.

The goal is to **prompt your donors to submit their matching gift forms** and make it as easy as possible for them 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.

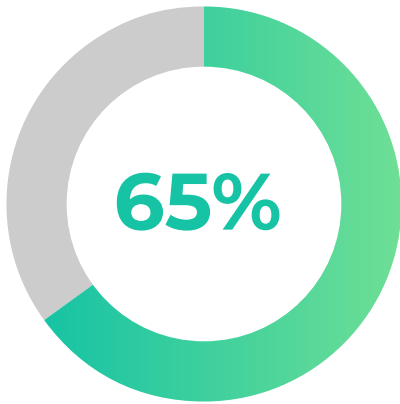


ACROSS COMMUNICATIONS

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



Matching Gift Statistics



DID YOU KNOW

65% of Fortune 500 companies match employee donations to a wide range of nonprofits. Many smaller companies are beginning to follow suit as corporate philanthropy becomes more public and widespread.

- An estimated **\$4-7 billion** in matching gift revenue goes unclaimed every year.
Source: Double the Donation's Analysis of Matching Gift Participation Rates
- Mentioning matching gifts in fundraising appeals results in a **71%** increase in the response rate and a **51%** increase in the average donation amount.
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



A man and a woman in business attire are looking at a tablet together in an office setting. The man is on the left, leaning over the woman on the right. They are both focused on the device. The background is a blurred office environment with computer monitors and desks. The entire image has a green tint.

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 gift requests.

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 will 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 following the date of the donation

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

• Verizon - until the end of January in the year following when the donation was made

MANY PAST DONORS ARE STILL ELIGIBLE TO SUBMIT MATCHING GIFT REQUESTS TO THEIR EMPLOYERS.

Measuring your Matching Gift Performance

Success

Solution

Business Str

Innovation
Branding
Solution
Marketing
Analysis
Ideas
Success
Management

Innovation
Branding
Solution
Marketing
Analysis
Ideas
Success
Management

○ SOCIAL NETWORK



Apr May Jun Jul Aug Sep Oct Nov Dec



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 increasing your intake of these generous corporate funds.

Tracking data can be hard, but you need to know where you stand in order to see improvement. Plus, 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 gifts



**Double the
Donation's Matching
Gift Tools**



Double the Donation's team maintains the most extensive and up-to-date database of companies that 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 incredible impact they can have to ensure that eligible donors understand the opportunity offered by 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 gift requests.

INCREASE REVENUE

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

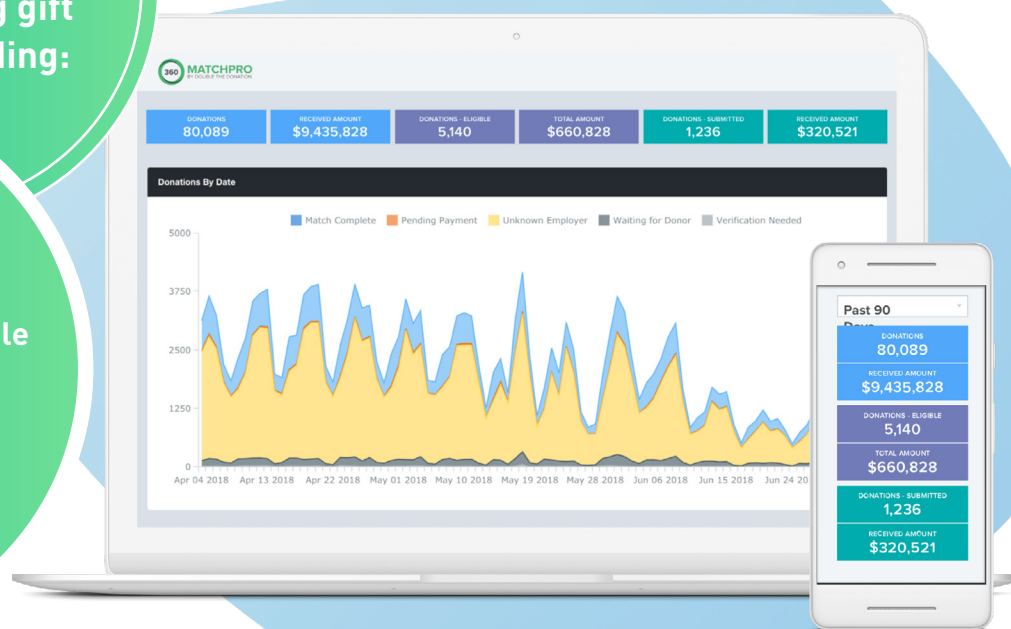
360MatchPro

Incorporate Double the Donation's matching gift search tool seamlessly as a field on your donation form.



360MatchPro completely automates your matching gift efforts, including:

- Automated email outreach
- Tracking of match-eligible donations
- Synthesizing matching gift data into actionable insights



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.

A blurred background image of a business meeting with a teal overlay. In the foreground, there are documents with charts and a pair of glasses.

Matching Gift Best Practices

11 Most Valuable Matching Gift Best Practices

Have you ever inserted a dollar into a vending machine and watched as two candy bars broke free? It's great. You get in the mood for chocolate, smooth out your dollar bill, try more than once to feed it into the machine, and make your selection. As you're watching your candy bar shake free, you see a second chocolate bar follow suit.

Matching gifts are the fundraising equivalent; for the time and cost of acquiring one donation, you get twice the funding.

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, stand back, and watch the extra chocolate bars fall.

#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: INVEST IN MATCHING GIFTS

Your nonprofit will be better served by appointing one person as the expert matching gift coordinator than it would be by having your whole staff know just a few facts about matching gifts.

However, if your organization doesn't have the time or manpower to commit an agent to matching gifts, let software do it for you. Double the Donation's 360MatchPro functions as an entire matching gift team, and its incredible automation removes the risk and cost of human error.

#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 gifts page, and outline matching gifts in an email newsletter. Mention matching gifts whenever and wherever you can.

#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, 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 that your donors work for will help you segment out matching gift prospects. Double the Donation's 360MatchPro will do this automatically.

#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 matching gifts page
- Embed a matching gift plugin that can help the donor search for his or her company's program
- Send out informational materials in the mail
- Highlight key matching gift statistics
- List some of the companies that commonly match gifts for your nonprofit
- Ensure that your nonprofit is a one-stop shop for all things matching gifts

#6: KEEP RECORDS OF THE MATCHED GIFTS THROUGHOUT 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 your process is, the better the results will be. The following figures will help you to enhance your matching gift efforts:

- 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 cost and time it takes to acquire the gifts
- The percentage of your total revenue that matching gifts account for

Many of these figures are automatically generated within 360MatchPro.

#7: THANK YOUR DONORS

Thank your donor once for the initial donation and a second time when the matched gift is received. 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 programs. If you want to foster a new relationship, your nonprofit is going to have to impress the company, and appreciation goes a long way.

#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 clean and 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 that 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 to 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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matching gifts made easy

www.doublethedonation.com