

The Ultimate Guide to Matching Gifts



Double *the* Donation
matching gifts made easy

Table of Contents

Matching Gift Basics.....	3
The Details: Nonprofit Eligibility, Ratios and Amounts.....	6
Top Matching Gift Companies	9
Marketing Matching Gifts.....	13
Matching Gift Statistics.....	17
Matching Gift Submission Process	19
Measuring your Matching Gift Performance.....	22
Double the Donation's Matching Gift Tools.....	24
Actionable Matching Gift Best Practices.....	28

Matching Gift Basics



Matching gifts are a form of corporate philanthropy in which companies will match their employees' charitable contributions to nonprofits and educational institutions. Over 65% of Fortune 500 companies offer matching gift programs, resulting in an estimated \$2-3 billion donated through matching programs annually.



How can matching gift programs help fundraisers?

When donors take advantage of corporate matching gift programs, their contributions are doubled (and sometimes tripled), instantly increasing the impact of their generosity. This not only encourages greater donations but also motivates donors to give more generously, creating a win-win scenario that empowers fundraisers to achieve their goals more efficiently.



Can matching gifts make a significant impact on organizations?

Tens of thousands of companies offer matching gift programs, leading to over 26 million individuals qualifying for matching gifts. With so many matching gift opportunities available to fundraisers, this source of revenue can significantly boost donation revenue. With matching gifts, fundraisers can leverage significant corporate support while also engaging donors in a meaningful way.



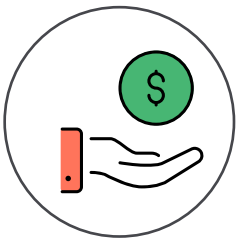
How can fundraisers ensure they meet their matching gift potential?

Most fundraisers receive a very small percentage of the matching gifts that they qualify to earn. This is primarily because most match-eligible donors are unaware that their employer offers a matching gift program - so they certainly don't know how to submit a match. Addressing these challenges through better communication, streamlined processes, and technology solutions can help organizations unlock their full matching gift potential and increase fundraising revenue.

Matching Gift Basics

Earning two gifts for the effort of acquiring one may seem too good to be true, but that's exactly how matching gifts can impact your organization.

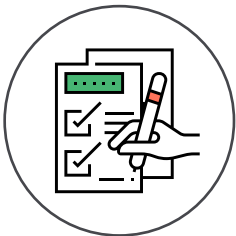
Here's how they work:



An individual makes a gift to your organization.



The donor then submits a matching gift request to their employer.



The company would approve the request based on their program guidelines. Then the company issues payment to your organization.



With these steps, you can double gifts made to your nonprofit!

The Details: Nonprofit Eligibility, Ratios, & Amounts



Organization eligibility

The majority of nonprofits and educational institutions qualify for matching gift programs, however, there are sometimes limitations on eligibility based on company program standards. Since these program parameters vary from company to company, there are no universal guidelines.



MOST FUNDRAISERS
QUALIFY FOR THE
**MAJORITY OF MATCHING
GIFT PROGRAMS**

Double the Donation maintains the industry's largest matching gift database, storing program parameters, guidelines and submission steps for tens of thousands of companies. In Double the Donation's database, two-thirds of companies match donations to the majority of 501(c)(3) organizations, while the remainder matched to broadly defined categories such as:

- Higher education institutions
- K-12 Institutions
- Arts and Cultural Organizations
- Community Based Social Services
- Environmental Organizations
- Healthcare Based Organizations

Sometimes companies will have matching restrictions for:

- Strictly political organizations
- Sports teams
- Houses of worship, though many faith-based organizations with community outreach components are eligible to receive matching gifts.

Ratios & Amounts



Companies may structure their matching gift amounts through matching gift ratios, minimums, maximums, and the donor's employment status. This means that the value of a matching gift can vary widely based on the employer program offered.

A single additional matching gift can become a major gift 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 match amounts are the total amount per year that a company will donate on behalf of an employee. These maximum matches can vary widely in range. The average match maximum is typically between \$1,000 and \$15,000, however, there are plenty of maximums outside of that scope.

3. Minimum Match:

Typically a company will designate a minimum match amount, meaning 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:

- Apple matches donations at a 1:1 rate.
- Soros Fund Management matches donations at a 2:1 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.
- General Electric matches donations up to \$5,000 annually per employee.
- Merck matches donations up to \$30,000 annually per employee.
- LyondellBasell Industries matches up to \$50,000 per employee per year

Minimum Match Examples:

- Harris Corporation matches employee donations greater than \$10
- Microsoft matches employee donations greater than \$1

Top Matching Gift Companies



Examples of Top Matching Gift Companies

With tens of thousands of companies offering matching gift programs, there are a wide range of corporations that can double the gifts of their employees.

Double the Donation maintains the most extensive database of companies, and these are some of the most powerful programs out there.

Many of your donors may already work for a matching gift company - so they could **double their gift to your organization!**



BP British Petroleum

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 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. Despite wanting to support your mission, many individuals may not know about matching gift programs, or they may not understand how to take the steps to submit their match.

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 - if only they knew what steps to take.

By properly marketing matching gifts, you can provide your donor base with the tools they need to maximize support for your mission.

The goal of marketing matching gift programs is to **educate and empower your donors to submit matches** - all while making it easy for them to do so.



Suggested places to feature matching gifts include:

- On donation forms/donation confirmation pages
- On a dedicated matching gift page
- On social media
- In email outreach
- Across fundraising communication channels



IN THE DONATION PROCESS

Identify match-eligible donors on your donation page to determine how to follow up with your donors. With a simple search field, you can find which supporters can qualify to double their gift.

Then, you can provide a call to action on your donation confirmation page asking your donors to submit their match.



ACROSS YOUR WEBSITE

Many donors may search your website to try to understand their matching gift eligibility and next steps. You don't want to leave them with unanswered questions - make sure to feature matching gifts on a dedicated web page to help your supporters quickly find and understand their matching gift forms, guidelines and instructions.

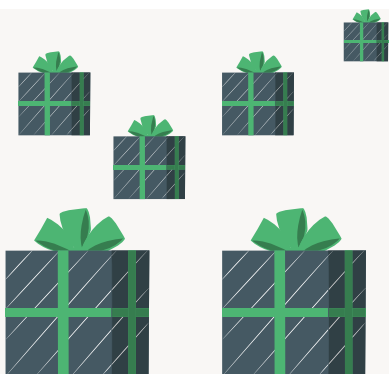


ACROSS COMMUNICATIONS

Promoting matching gifts can actually lead to increased donation amounts and donor engagement! Make sure to drive supporters to your matching gift messaging to not only ensure they secure a match for your organization, but also to facilitate greater engagement in your mission

Matching Gift Communication Tips

Many donors have never heard of employer matching gift programs before. Because of that, it's important that nonprofits and educational institutions:



Provide context: if a donor receives a call to action without understanding its purpose, then there is a risk the donor won't take necessary next steps. When asking donors to submit a matching gift request, make sure to provide them with the details they need to understand matching gift programs.



Use imagery: a picture is worth a thousand words, so including graphics or images in your matching gift outreach can help to demonstrate important points to your donors. Many fundraisers use images to demonstrate matching or doubling impact. For example, if your organization helps shelter animals, you can share two puppies in an infographic. If your organization provides collegiate scholarships, you could display two graduation caps to demonstrate the doubled impact.



Give actionable next steps: if you're able to provide donors with a direct link to their matching gift request form, then it's much easier for them to submit their matching gift request. By using a matching gift database you can direct donors seamlessly to their company match submission form, allowing them to double their impact with just one click.

Matching Gift Statistics



DID YOU KNOW

1 in 3 donors indicate they'd give a larger base gift if matching is applied to their donation?



Employer matching gifts are everywhere, and they can have a significant impact on your organization. In fact:

- Mentioning matching gifts in fundraising appeals results in a **71%** increase in the response rate and a **51%** increase in the average donation amount.
- **84%** of donors say they're more likely to donate if a match is offered
- An estimated **\$2-3 billion** is donated through matching gift programs annually.

Despite the potential impact of matching gifts, many nonprofits don't meet their matching gift potential:

- **\$4-7 billion** in matching gift revenue goes unclaimed each year.
- **78%** of donors are unaware if their company offers a matching gift program and the program specifics.
- **Only 1.31%** of individual contributions are matched at the average nonprofit organization, despite approximately **10%** being eligible for corporate matches.

Luckily, there are simple ways that fundraisers can promote matching gifts and begin driving additional revenue for their organizations.

Sources:

[Tech Soup: Which Fundraising Strategies Work?](#)

[The Big-Give Research Initiative](#)

[Double the Donation's Analysis of Matching Gift Participation Rates](#)

Matching Gift Submission Process



Submission Process:

The key to a successful matching gift submission process is ensuring that donors know how to access their submission forms.

Double the Donation provides fundraisers with an easy way to share matching gift submission forms alongside guidelines and instructions to educate and empower donors to complete the matching gift process.

Program deadlines and parameters can vary by company, so your donors will need to ensure that:



They gave to a nonprofit or institution that qualifies for their matching gift program



The gift met their program's minimum or maximum gift match requirement



Their company matches to them as an employee (example: some companies match to part-time employees, retirees, or spouses of employees, while others don't)



They made the gift before the end of their program deadlines

As long as the donor's gift qualifies for a match, they can then submit one using their employer's process. Typically that just requires an online form submitted, which will be approved by the company itself. The employer will then disperse the payment to the initial nonprofit or educational institution.

How do matching gift submission deadlines work?

Different companies choose submission deadlines. Here are some common examples of matching gift deadlines:

Within a set number of months after the date of the donation (usually 3-12 months)

Example: *Adobe - 12 months / DirectTV - 6 months / Altria - 90 days*

End of the calendar year

Example: *Freeport-McMoRan - until 12/31 of the year following the date of the donation*

End of January, February, or March in the subsequence year the donation was made

Example: *Verizon - until the end of January following the year the donation was made*

Many past donors are still eligible to submit matching gift requests to their employers, but it's important that you remind them of their matching gift opportunities before their submission date passes!

TIP: Usually when donors submit their matching gift requests, they must identify their submission page and log in. With Double the Donation's auto-submission, donors can actually submit their matching gift directly from the donation thank you page. [Learn more here.](#)

Measuring your Matching Gift Performance



Measuring Matching Gift Performance



Matching gift performance is important to track; it allows you to understand your success, challenges, and ways to improve matching gift metrics. Many fundraisers run into challenges with tracking matching gift data:

- It can be tough to know when donors submitted their matches. Just because a donor qualified for a matching gift program, it doesn't mean they submitted their gift.
- Matching gift payouts are often delayed. Companies have different guidelines around matching gift program payouts, so sometimes fundraisers are waiting for financial disbursements despite knowing their donors submitted matching gifts.
- The gifts themselves are often paid out by corporate vendor platforms, or the companies that help corporations facilitate their matching gift program. Because of that, it can be tricky to link matching gift payments back to the donor who made the initial request.

Using matching gift software, like Double the Donation's 360MatchPro, can make it significantly easier to track the success of matching gift initiatives.

WHEN LOOKING AT YOUR METRICS, WE RECOMMEND TRACKING:

- The number of matches identified in your donor base
- The total amount raised from matching gifts
- Percentage of donations that included matches
- Percentage of total revenue raised from matches

It can also be helpful to know how many supporters on your mailing list are opening and interacting with your matching gift messaging.

Double the Donation's Matching Gift Tools





Double *the* Donation
matching gifts made easy

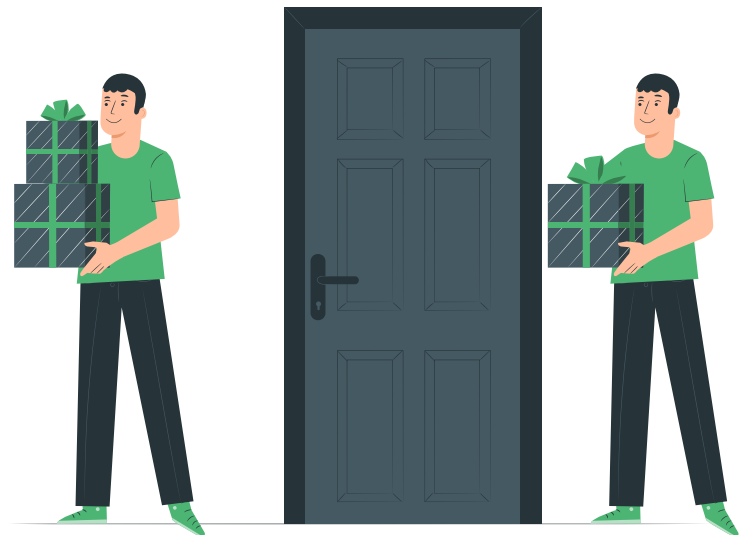
Double the Donation is the leading provider of employer matching gift software. With the industry's largest matching gift database, Double the Donation works with thousands of fundraisers to help them earn more matching gift revenue.

Double the Donation's tool, 360MatchPro, integrates with over 90 fundraising platforms to help more fundraisers identify match-eligible donors and help to drive their matching gift requests to completion.



HOW DOES IT WORK?

1. Donor makes a gift to your organization
2. 360MatchPro identifies the donor's matching gift eligibility
3. The donor accesses a direct link to their employer matching gift form on the donation confirmation page
4. 360MatchPro automates customizable matching gift outreach, enabling donors to submit their matches after the donation process as well
5. 360MatchPro provides users with a robust matching gift tracking and reporting dashboard for maximum success



WHY USE 360MATCHPRO?



**INCREASE
REVENUE**



**SOLVE THE DONOR
AWARENESS GAP**



**ACCESS SEAMLESS
TECHNOLOGY**

360MatchPro

What makes 360MatchPro stand out?



Matching Gift Auto-submission: 360MatchPro is the only software platform that has the power to complete matching gift requests on behalf of donors for select companies - saving donors time while generating greater donation amounts.



Powerful integrations: 360MatchPro integrates with over 90 donation forms/CRMs to make it easy to increase revenue.



Top-rated support: Double the Donation's full time support team is always available to help fundraisers maximize success through matching gifts.



Accessibility: The Double the Donation team prioritizes accessibility features to ensure all users can access our tools. Double the Donation's 360MatchPro is the only matching gift software provider with a VPAT (Voluntary Product Accessibility Template).



Learning resources: Double the Donation offers the industry's only Matching Gift Academy, which contains learning modules related to matching gift marketing, tracking, and more. Access the Matching Gift Academy for free with a 360MatchPro subscription.

That's not all - 360MatchPro has served thousands of customers to help them reach their matching gift goals.

360MatchPro Customers

What do fundraising users have to say about 360MatchPro?

Just 3 months to positive ROI

As a small nonprofit, I am very frugal with the funds entrusted to me. I purchased the three year package upfront and now 3 months in, the software has more than paid for itself in matching donations.



Executive Director

\$1,000,000+ matches identified in 1 year

From the leadership to the support team, everyone at Double the Donation has been excellent to work with! The tool itself is simple to set up and use, and we were already seeing amazing ROI with matching gifts!



Chief Community Engagement Officer -
FSDH Society

92% more matching gift revenue

360MatchPro has increased our matching gift revenue by 92%, which is an additional \$3.4 million for our organization!



Director of Annual Giving -
Leukemia and Lymphoma Society

27% increase in matching gift revenue

We have integrated 360MatchPro into all of our donation forms and the intuitive process makes it so that constituents with all levels of technical capabilities can obtain and understand the matching gift information they need."



Senior Manager

Using Double the Donation for 3+ years

The company itself is incredibly friendly and has a customer-first focused mindset which is helpful if any issues arise. The NPO I work with has used the services at DtD for 3+ years now and we are incredibly happy with their service.



Community Engagement Manager -
Movember

More than \$400k in identified matches/year

We've been using Double the Donation for the past several years now and it has completely transformed the way we look at workplace giving. The user-friendly interface and powerful features have saved us so much time and effort. And whenever we have needed help, the Double the Donation team have been incredibly helpful.



Corporate Relations Manager -
Central Texas Food Bank

Matching Gift Best Practices



15 Actionable Matching Gift Best Practices

Now that you know much more about the world of matching gifts, you'll want to make sure you can help your team start leveraging their fundraising power.

To help you get started, here's a list of the 11 most valuable matching gift practices. Follow these tips and tricks to start growing your matching gift revenue.

#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: GET MATCHING GIFT BUY-IN

It's easier to secure matching gift funding when you have your team standing behind you. Talk to your internal team members about the value of matching gifts, and ensure they understand the large impact that matches can make on your fundraising.

#3: 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. 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 it's incredible automation removes the risk and cost of human error.

#4: 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.

#5: FOLLOW UP WITH DONORS

It's a great idea to communicate matching gifts to donors while they're still in the giving mindset. After a donor makes a gift to your organization, make sure to ask them to secure a matching gift to ensure their contribution goes twice as far.

#6: 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.

#7: 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

#8: 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.

#9: 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.

#10: 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.

#11: 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.

#12: REFRESH EXISTING RECORDS

Employment information can often change, so it's important that you don't assume your donors' matching gift eligibility will always be the same. Ask your donor base about donation matching gift eligibility regularly to ensure the information in your database remains accurate.

#13: 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 take a well-prepared approach to finding matching gift donors.

#14: SEARCH FOR COMPANY SUPPORT HUBS

When you begin driving matching gift revenue, you may start to notice a higher concentration of donors who work for the same company. This could be because of your geographic location, the type of service you provide, or the audience that you target. It's a good idea to see if you have a significant chunk of supporters who request a matching gift from the same company, because that can allow you to uncover matching gift opportunities.

#15: 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