

Jump-Start Your Matching Gift Program

How to acquire the data, the systems, and the donor cooperation you need to generate more gifts

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Question: What's the biggest challenge today for nonprofits that want to increase the contributions they collect from companies' matching-gift programs?

- A. Corporate bankruptcies?
- B. Widespread layoffs?
- C. Mergers?

None of the above, says Stephen Swain, fundraising consultant with Blackbaud Professional Services. The No. 1, 2, and 3 drags on matching gifts are ignorance, disorganization, and apathy — on the part of charities, not corporate donors. The nonprofits that fall far short of their matching-gift potential generally lack the knowledge, the systems, or the will to pursue these extra funds.

True, hard economic times will squeeze matching gifts. Firms facing financial crises have stopped matching employee contributions. Obviously, laid-off workers don't generate matches. And when two companies with different matching-gift programs merge, Swain notes, the resulting business usually adopts the less-generous match. A dollar-for-dollar program, for example, will usually supplant a 2-for-1 match.

But don't blame business woes for your lack of matching gifts until you've taken a hard look at your own efforts. Chances are that if you make a concerted push to identify and solicit donors with matching-gift potential, you can more than make up for any damage done by the soft economy or corporate crises.

Plugging the Information Map

The promise of matching gifts is that they can multiply your constituents' generosity at no extra cost to the donor. The problem? Matching gifts have to be initiated by the donor — and donors are often unaware that they need to act. Your organization must fill the information gap and provide the push.

Nonprofits that don't get their share of matching gifts suffer three problems, says Swain: They don't know where their constituents are employed, they don't know which employers match workers' contributions, and they don't ask donors to follow through to get the match. Fixing those problems takes effort. But it's not rocket science.

Getting employment data on your contributors is crucial. If you find yourself facing an information void, consider doing an immediate survey, piggybacked perhaps on an annual-fund solicitation you've already planned. You can't just add a "tell us your employer" line to the form — privacy-

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conscious donors may balk at giving up any information if they don't know why you want it. So tell them about matching gifts and how their job data can help them boost your cause.

Every interaction creates a new opportunity to collect or update the data. Phonathon callers should be trained to explain matching gifts and ask: "Tell me where you work and I can tell you whether your employer matches gifts." (Make sure the callers record the answer!) Your magazine, newsletter, and annual report should all mention matching gifts and offer a mail-in card that lets donors check on their eligibility for matches.

At some universities, every change-of-address form triggers a confirmation mail-back that lists the last known employer and asks, "As a result of your recent move, has any of this information changed? Let us know." You can take that further, adding a card with every mailing that says, "Here's the information we have; is it still correct?" It's funny: Although donors may be reluctant to give you job information at first, they often feel compelled to fix any errors. So maintaining data can be relatively easy — once you've gathered it.

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Then comes the tough part: Nagging. Most employers require their workers to initiate a match by filling out a form, sending in a gift receipt, or making an online request. Rules and procedures vary from company to company, and donor companies have fought off all efforts to develop a standard matching-gift form. Thanks to these hurdles, even eager donors often forget or postpone the extra effort to get a match.

So someone has to push them — and that someone is you. At every chance, whether you're soliciting or acknowledging, send out a reminder: "Your company will match your gift. Please check with your human resources office to follow up." Also build matching-gift ticklers into your records system to prompt follow-ups if the forms don't arrive on time. Or add an extra caller to your next phonathon with a special script: "Thank you for your previous gift. I'm not going to ask you for more this time — but we'd really appreciate your filling out the matching-gift form." Remind them, then remind them again. Donors will respond to gentle but persistent cues.

If your data show that you have many constituents employed at the same company, consider recruiting from their ranks a "matching-gift agent." Much like a college alumni association's class agent, this volunteer can encourage matching gifts and provide vital, specific guidance on negotiating that company's forms and systems.

What if your once-steady matching gift flow is tapering off? Your employment data may be out of date, so you need a survey to capture job changes. Or you might be falling short of the intensive follow-up you need. Review your gifts from the last 12 months to see whether matches ever came through, and consider mailing reminders to eligible contributors who could still get matches. (Beware: Many companies will match gifts only if they receive the paperwork within a set time

period — within 90 days of the gift is typical. Often, your database will identify those time limits. Don't frustrate donors by asking them to initiate a matching request that will be denied. Instead, resolve to do better on their next gifts.)

about Blackbaud

Nonprofit organizations around the world use Blackbaud software and services to increase donations, reduce fundraising costs, better manage their finances, and market their missions to the public. We now have more than 19,000 customers spread over 55 countries, which gives us a unique perspective on the nonprofit community. Organizations such as the American Red Cross, Dartmouth College, the WGBH Educational Foundation, Cancer Research UK, Special Olympics, and the Arthritis Foundation depend on Blackbaud software and services to help them operate more efficiently. It is a great source of pride for us to have been a small part of these organizations' success.

For more information about Blackbaud solutions, contact a Blackbaud account representative. In the United States and Canada call toll-free 800-443-9441. In Europe call +44 (0) 141 575 0000 or visit us on the web at www.blackbaud.com

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Technology's Role in Doubling Your Dollars

Clearly, strong records and the software to mine them can multiply your matching-gift efforts. Fundraisers have always stored away gigabytes of information — but getting at the data they needed was seldom easy. Today's more powerful reporting software creates new and easier chances to generate reports and reminders.

New technologies make it even easier to capture matching gifts. Charities that do fundraising online can link their Web sites to search engines that let donors determine immediately whether their employers match gifts. In some cases, donors can even click through to an employer's Web-based gift form and initiate the match during the same session. If your donors' employers still use paper forms, explore whether you could link to the forms — or even store them on your own site — in a popular, easy-to-use format like Adobe Acrobat. Again, immediacy is important: Wipe out the barriers and contributors will initiate more matches with fewer delays.

With all the reminders you need to provide, email can be a cost-effective way to spur more contributors to get matches. Just as you do with other communications, study your constituents carefully to determine which donors would welcome electronic ticklers. Online contributors are an obvious target, but so too are donors who use their credit cards to give via regular mail. Check-writers, on the other hand, might be more conservative and prefer reminders in the mail.

Of course, even the most whiz-bang technology won't close your matching-gift gap by itself.

You need people with creative ideas and approaches to figure out how to apply your data and communications. (And, in today's high-turnover fundraising ranks, you've got to go out of your way to document what works via a well-written policies-and-procedures manual. As experienced staffers leave and new people take their place, keeping that manual up to date is a critical piece of all your fundraising efforts.)

No one action will ignite your matching-gift program. This is an area where every small action can contribute to a large return. It requires a methodical approach: Explore every possible means to find the information you need, and take every opportunity to convey the message to your eligible donors. Boosting your matching gifts doesn't take rocket science — but attention and hard work will help your program take off.