



Double *the* Donation
matching gifts made easy

CORPORATE MATCHING GIFTS:

The Complete Guide for Affiliates and Chapters



A closer look into common barriers affiliates face
—and suggestions for overcoming them with ease

TABLE OF CONTENTS

Consolidating the Process.....	3
Step 1... Assess Your Current Situation.....	4
Step 2... Develop an Action Plan.....	6
Step 3... Continue the Conversation.....	9
Common Barriers Facing Affiliates (& Their Solutions).....	10
Inconsistent Donor Experience	10
Infrastructure Limitations.....	12
Getting Everyone on Board.....	13
Benefits of Matching Gift Standardization.....	14
Concluding Thoughts.....	16

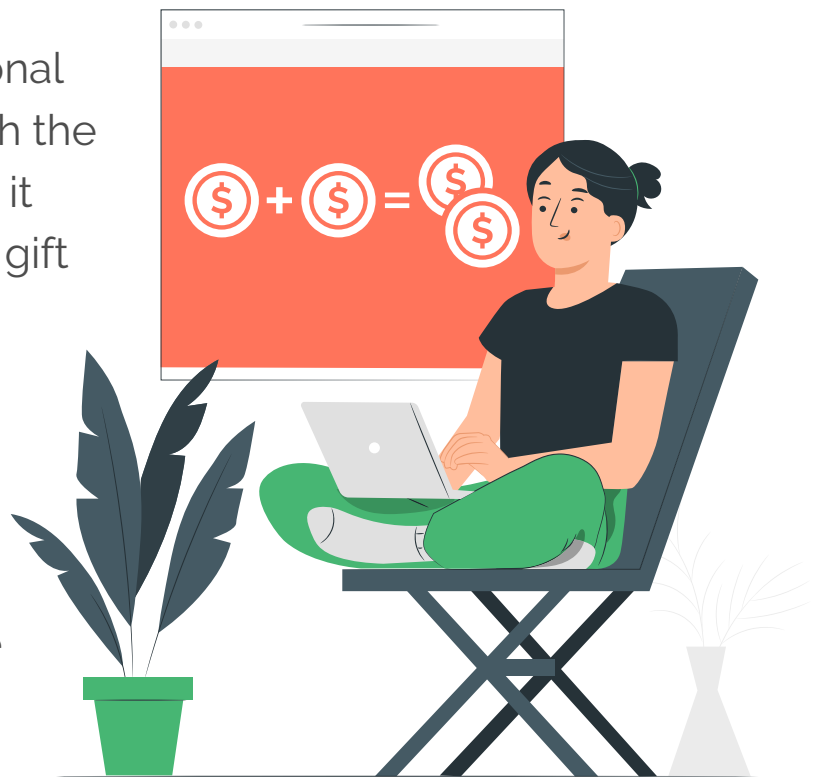
Consolidating the Process

Managing matching gifts can be difficult enough for grassroots and other small organizations to handle. When you throw in a complex structure that includes multiple chapters, it becomes immensely more sophisticated—that is unless you consolidate the process.

In short, consolidating matching gifts involves all chapters or affiliates following a centralized strategy for securing and handling these funds. While full consolidation may not be feasible for all organizations, the more you can systematize the process, the better!

Here at **Double the Donation**, we've worked with thousands of nonprofits and have seen all different types of organizational structures. We're familiar with the pros and cons of each when it comes to defining matching gift procedures and understand that it's tough to find a perfect solution for every organization.

Based on this experience and the conversations we've had, we strongly believe in centralizing matching gifts.



In this article, we'll discuss the step-by-step process for standardization, the benefits of doing so, and common pain points (with actionable solutions!) that many organizations following this model face.

Make the most of the information shared here to reflect on your organization's performance and enhance your strategies. In no time, you'll be well on your way to creating a foolproof and standardized strategy, sparking team-wide engagement, and securing more matching gifts for your chapter or affiliate.

STEP 01

Assess Your Current Situation



Knowing where to start can be difficult—especially if you're brand new to the limitless world of matching gifts. Before you can create an end-to-end solution customized to your nonprofit, you need to know exactly where you currently stand. That is, how does the process currently look for your nonprofit? Is it based on one common solution, or have you left each chapter to its own devices?

Determining how your matching gift strategy is currently structured and how you'd like it to be structured early on is the key first step.

Let's take a look at some of the most common approaches, key considerations for each, and the next steps to successfully implement an effective approach.



	Pros 	Cons 
Fully Centralized	<ul style="list-style-type: none"> More consistent donor experiences Easier to create buy-in across the organization 	<ul style="list-style-type: none"> Local chapters lose visibility unless reporting is done well
Centralized by Region	<ul style="list-style-type: none"> More consistent donor experiences Easier to create buy-in across the organization Better visibility and reporting 	<ul style="list-style-type: none"> Challenges for local staff to assist donors when they reach out
Fully Independent by Chapter	<ul style="list-style-type: none"> Staff can best accommodate individual requests or situations Ability to provide reporting for individual chapters only 	<ul style="list-style-type: none"> Difficult to create a consistent donor experience across the organization Challenges with evaluating matching gifts as an organization

Next Steps

- ▶ Evaluate your current processes and tools.
- ▶ Identify ownership.
- ▶ Determine the model that best fits your organization.
- ▶ Create a process and timeline for transitioning.
- ▶ Communicate changes and create staff buy-in.
- ▶ Continue to improve the donor experience and drive matching gift revenue.

It's important to keep in mind that what works for one organization might not work for another. Therefore, it's a good idea to choose an approach that suits your unique needs. Plus, it's important to note that not every organization has a clear-cut approach. To create a strategy that's tailored to your team's needs, you might choose to take elements of each and blend them together instead.

No matter your decision, your primary goal should be consolidating matching gift management. Whether that's on a national level or a regional one largely depends on your organization's needs. However, the more defined and centralized your matching gift process is, the less room there is for error and confusion.

Streamline the process across the board, and you'll be well on your way to gaining organization-wide approval.

STEP 02

Develop an Action Plan



To get started, headquarters will likely want to align on the matching gift process for affiliates. However, this may lead to some resistance if chapters feel as if they have no say in the matter. **In order for each affiliate to feel as though its voice is heard, consider assembling a team of affiliate and national representatives.** Then, hold a video or phone conference to discuss and implement an organization-wide process.

If you expect everyone to jump on board, you'll need to plan your strategy from end to end. Any gaps could lead to skepticism about the soundness of your proposal. Thus, we recommend walking through each of the following questions so that you can create a solution that works across all chapters.

Understanding Current Processes

Questions to Ask	Next Steps
Who is responsible for growing matching gift revenue at your organization? Is it someone from HQ, a group of individuals across the organization, or individuals at the affiliate level?	Select a designated staff member who owns matching gifts. This allows you to increase matching gift knowledge across staff members, quickly gaining approval and securing matching gifts in a timely manner.
How will you grow your matching gift revenue as part of the standardization process?	Create a matching gift process and follow it to completion.
What does your current matching gift process look like? Are there any examples you can follow internally?	Look at your current matching gift processes and locate the drop-off for matches so that you can improve those issues.

Putting a Team in Place

Questions to Ask	Next Steps
How many staff members will you need for matching gifts?	Base the size of your matching gifts team on the volume of matching gifts you receive.
Who will handle the transition and management of matching gift portals?	Pick a team to manage all matching gift portals. Then, have every chapter or affiliate send portal information to the designated team.
Who will answer donor questions about matching gifts? Will this be centralized or at the chapter level? Will your donor support team be involved in any way?	Decide what works best for your team. Having a centralized support system ensures the process that's been laid out will not vary.

Optimizing the Lifecycle

Questions to Ask	Next Steps
Who will handle the verification process for matching gifts?	Establish which team (ideally, the support team) will handle the matching gift verification process.
What will the transition process look like?	Centralize your matching gift process. Having a single team handle all things matching gifts ensures the process is consistently driven to completion.

Operational Processes

Questions to Ask	Next Steps
What will be your organization-wide revenue goal?	Establish the total amount raised in matching gifts for the previous year—and work to improve from there.
What about individual chapters' revenue goals? Are the chapter goals set by nationals or each chapter?	Find out your organization's process for revenue goals, whether that's chapter-based or at the national level.
What does a great matching gift donor persona look like for the organization?	Set goals for what percentage of matching gifts your organization would like to obtain.
What does a great matching gift company look like for your organization?	Identify your top and ideal matching gift companies, and work toward creating a donor base of employees who work at those businesses.

Once you've solidified your plan, lay it out in front of your affiliates. The more information you provide them, the better. This makes for a more significant chance for each chapter to adopt the new processes.

STEP 03

Continue the Conversation



At this point, let's say that each of your chapters or affiliates has successfully adopted the new matching gift procedures. That's wonderful! But the conversation doesn't have to stop just because you've fixed the process.

In fact, once you've standardized the procedure, you can facilitate strategic conversations about matching gifts. From here, you can grow your strategy to new heights and focus it more on your mission!

To maintain an open line of communication, meet with your team of representatives on a regular basis. Keep the table open for discussion by welcoming new ideas, and initiate an effective conversation by coming prepared with topics such as:

- ▶ Reviewing and improving the donor journey
 - ◇ Recommended resource: [Improving the Donor Journey With Matching Gifts](#)
- ▶ Optimizing matching gift portals and portal management
 - ◇ Recommended resource: [Registering Your Org with CSR Platforms + Key Steps for Each](#)
- ▶ Creating consistent training for staff and fundraisers (Free for current Double the Donation users!)
 - ◇ Recommended resource: [Double the Donation's Matching Gift Academy](#)
- ▶ How matching gift technology can help streamline operations
 - ◇ Recommended resource: [How Double the Donation Matching Can Drive Fundraising For Your Mission](#)
- ▶ Recent and expected matching gift fundraising trends
 - ◇ Recommended resource: [8 Trends in Corporate Philanthropy: How to Tap In](#)
- ▶ What other organizations are doing to promote matching gifts effectively
 - ◇ Recommended resource: [Double the Donation's Complete Case Study Compilation](#)

From here, determine how you can quicken the process and maximize efficiency. As you learn what works best, you can refine your strategies and streamline the process.

Whatever you do, don't stop discussing matching gifts—and how you can improve things even further.

Common Barriers Facing Affiliates (& Their Solutions)

While each chapter or affiliate may have its own set of unique challenges regarding matching gifts, most will encounter several common pain points. Instead of going in blindly, take time to read up on them now so you can face these instances with confidence if or when they arise.



Problem: Inconsistent Donor Experiences

Arguably, the most significant barrier affiliates face is an inconsistent donor experience across the entire organization.

From varying donation forms to a lack of internal matching gift support, the donor experience can vary widely from chapter to chapter—and across the organization as a whole. Overall, this creates a fractured donor experience throughout the nonprofit.

What it all boils down to is this: if donors have a difficult time submitting their matches, they may not participate in the future—or even complete the matching gift process in the first place.



Solution: Standardize the Matching Gift Experience.

To address inconsistent donor experiences, it's essential to create a unified approach to matching gift outreach and support across all affiliates. Here are key steps to consider:

1. Implement a Centralized Matching Gift Platform

Invest in a [corporate giving software solution](#) that can be used organization-wide. This ensures all chapters have access to the same tools and resources, creating a seamless experience for donors regardless of their location. Look for a platform that automates matching gift identification, follows up with donors, and integrates with your nonprofit's CRM.

2. Streamline Donation Forms Across Chapters

For the best results across all chapters of your organization, you'll want to design consistently branded donation forms that include matching gift prompts and educational resources. From there, ensure all forms are mobile-friendly and clearly highlight the option to double or even triple their donations through employer match programs. You'll want Double the Donation's search tool embedded in your forms across the organization for a streamlined and standardized experience as donors give.

3. Develop Clear Internal Policies and Training Materials

Provide affiliates with standardized training, templates, and resources to ensure staff and volunteers are equipped to assist donors with matching gift submissions—regardless of where they are focused within the organization. You can also create a centralized support team or resource hub to assist donors and affiliates with their matching gift inquiries at every step of the process. Double the Donation provides a number of [educational resources](#) to help

4. Consistent Branding and Messaging

Maintain consistent branding, language, and messaging in all donor-facing materials related to matching gifts. This includes emails, web pages, and social media posts. A unified voice not only strengthens the nonprofit's identity but also enhances trust and recognition among donors.

By standardizing these key elements, you can transform a fractured matching gift experience into a cohesive, donor-friendly process that fosters increased engagement and participation across all affiliates.





Problem: Infrastructure Limitations

While infrastructure works to expand your mission and reach new audiences, it can put limitations on matching gift standardization. Chances are, there hasn't been anyone who's taken ownership of outlining the struggles your organization faces. Ultimately, not tightening up your strategy allows things to fall through the cracks.

On that same note, organizations often see a lot of turnover in the markets. Staffing changes are inevitable. However, this can be a significant hindrance to consolidation and matching gifts as a whole.



Solution: Strengthen Your Framework for Long-Term Success.

To overcome infrastructure limitations and ensure a streamlined matching gift strategy, organizations need to build a strong foundation that promotes standardization and continuity. Here's how:

1. Assign a Dedicated Matching Gift Coordinator

Designate a matching gift lead at the national or organizational level to oversee the program's implementation, track progress, and provide support to all affiliates. This individual can champion matching gifts, ensuring consistency and offering a point of contact for questions and challenges.

2. Invest in Scalable Technology

Implement a robust matching gift platform that can accommodate the needs of your entire organization, regardless of size or staffing fluctuations. Choose a solution that simplifies tracking, reporting, and outreach, enabling each affiliate to stay aligned while reducing the burden on individual teams. The right matching gift software (like Double the Donation!) is essentially an addition to your existing fundraising team, so you'll want to choose the best tools for the job.



3. Implement Sustainable Training Practices

In the event those who are trained leave the organization, you'll need to have a set plan in place. As staff members transition out, make sure they create comprehensive instructions and information for their successors. It's important to have a clear process for where login information is stored, too.

By addressing infrastructure limitations with a comprehensive approach, your organization can tighten up its strategy, reduce inefficiencies, and empower affiliates to maximize their matching gift potential—regardless of staff turnover or operational challenges.



Problem: Getting Everyone on Board

All too often, a nonprofit's national headquarters struggles to get the entire team on board with any organization-wide solutions. With matching gifts in particular, headquarters usually faces a lack of focus among staff members.

Teams must also balance competing priorities, making it difficult to determine where matching gifts fall. However, if you want to secure every last matching gift dollar possible, you need everyone on board to the fullest extent.



Solution: Frame Standardization in a Positive Light.

To address inconsistent donor experiences, it's essential to create a unified approach to matching gift outreach and support across all affiliates. Here are key steps to consider:

Then, when proposing the resolution to chapters and affiliates, do the same by covering chapter-specific benefits. Harp on the positives so you can spark motivation. For starters, frame standardization so that chapters see they'll save hours of work (so long as it's handled at the national level). When you do the legwork for them, they'll be much more likely to comply.

Benefits of Matching Gift Standardization

While we've touched on the benefits of consolidating the matching gift process, let's take a more in-depth look at them here. If you're struggling to get buy-in from each chapter, you can leverage these benefits to create a case for support—and convey the true impact of standardization on your cause.

Increased Revenue from Matching Gifts

Consolidation can lead to a bump in revenue as more consistent processes are put in place. Instead of leaving chapters to their own devices, organization-wide strategies ensure that no opportunities are missed. For instance, matching identification and screening becomes easier with consistent data. You'll more easily identify top donors and companies as well as outstanding matches. With streamlined processes, your staff may even have additional time to follow up on these matches to help drive them to completion.



Plus, streamlining the process enables chapters to set aspirational goals beyond what they could've imagined initially. Defining goals sparks motivation and gives affiliates something to work toward. Then, when matching gifts start to hit their revenue line, affiliates and chapters truly get excited and start promoting them, boosting revenue even further.

Improved Donor Engagement

By this point, you likely recognize that matching gifts are a great donor engagement tool. After all, these programs can double (or sometimes even triple) the gifts your donors are already making—without them reaching back into their wallets to do so.



However, while some chapters prioritize matching gifts, others may be more focused on [alternative revenue streams](#). Luckily, though, defining and consolidating the back-end processes at headquarters enables you to avoid the rocky experiences that result from inconsistent efforts.

You can also create follow-up processes to drive additional matches to completion and implement additional touchpoints with your organization. Ultimately, this helps donors complete the process with minimal hassle and enables your organization to form much more meaningful relationships. Plus, it keeps your cause at the forefront of the donor's mind for a longer period of time!

Financial Tracking



Financial tracking and reconciliation across an entire organization can be quite challenging without a standardized process. However, by centralizing all the financial work at headquarters, you ensure data is consistent and much easier to handle.

We recommend walking through these questions to solidify your financial tracking methods:

QUESTIONS TO ASK

Bookkeeping

- How will you handle anonymous matches? Will funds be allocated to a chapter or a national bucket?
- How will you record offline donations from third-party vendors?
- Are payroll donations and matches from the company being placed into your system?



Crediting

- Do you have a separate line item for matching gifts, or are matches included in the budgets for other areas?
- Will you count matches as providing fundraising credit? If so, when will you credit those donors—and what does the verification process look like?
- How does the reallocation of matching funds work for your organization? Where in the process does this occur?
- Where should funds be disbursed (affiliates or nationals)?



Financial goals

- How will matches impact bookkeeping and fundraising goals?
- Do affiliates have matching gift goals? How will setting a matching gift goal affect an affiliate?
- Have you seen an increase in matching gifts year over year? If so, what contributed to that increase?



Regardless of your approach, consolidating the financial tracking process enables you to go above and beyond your revenue goals, which makes it a crucial point to leverage when creating buy-in.

Concluding Thoughts

There's no magical formula for matching gifts, but consolidation, in addition to other best practices, certainly has something to do with it. Without smart processes in place, we often find it challenging to move beyond day-to-day operations and start executing long-term solutions. However, having the proper organizational structure in place can mean the difference between being a nonprofit that thrives with matching gifts and one that simply survives.

Start by analyzing your current situation and defining a plan for where you'd like to be. Then, by keeping the conversation going, you can consolidate the process further, focus on tying in your mission, and maximize matching gifts throughout your entire organization—no matter how many chapters you have.



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 leveraging volunteer incentives quick and easy.

By partnering with our expert team, nonprofit teams can focus on what's truly important: serving their core missions—whether that's education, community enrichment, scientific research, or animal welfare.

Regardless of your mission or organizational structure, our team of professionals (and our robust matching gift platform) will help you consolidate and streamline the process from start to finish.



About the Author

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 gifts and volunteer grant programs.

The company partners with nonprofits of all shapes and sizes, including arts and cultural organizations, hospitals, educational institutions, and community-based organizations

See how Double the Donation helps chapters & affiliates supercharge their matching gift efforts.

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