



MEMBERSHIP ASSEMBLY

WELCOME!



"Level up your employee giving strategy"

Maximize Your Fundraising Strategies with Special Member Discounts and Partnerships

Ron Barrett, COGENCY GLOBAL

George Weiner, Founder and CEO, Whole Whale

Adam Weinger, President, Double the Donation



COGENCYGLOBAL

Formerly known as

NCR **NATIONAL
CORPORATE
RESEARCH, LTD.[®]**
The Right Response at the Right Time, Every Time.SM

Ron Barrett,
Vice President of Nonprofit Services

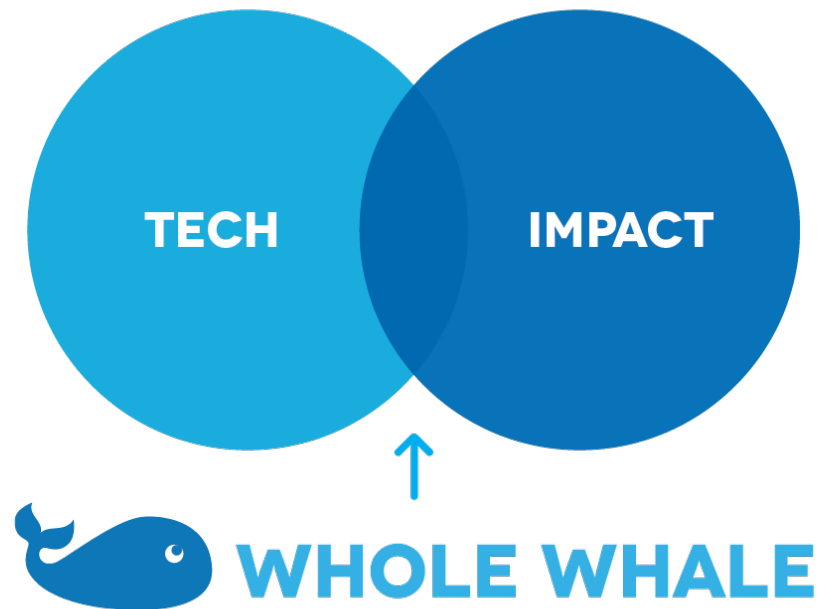




WHOLE WHALE

STRATEGY IN A SEA OF WEB DATA

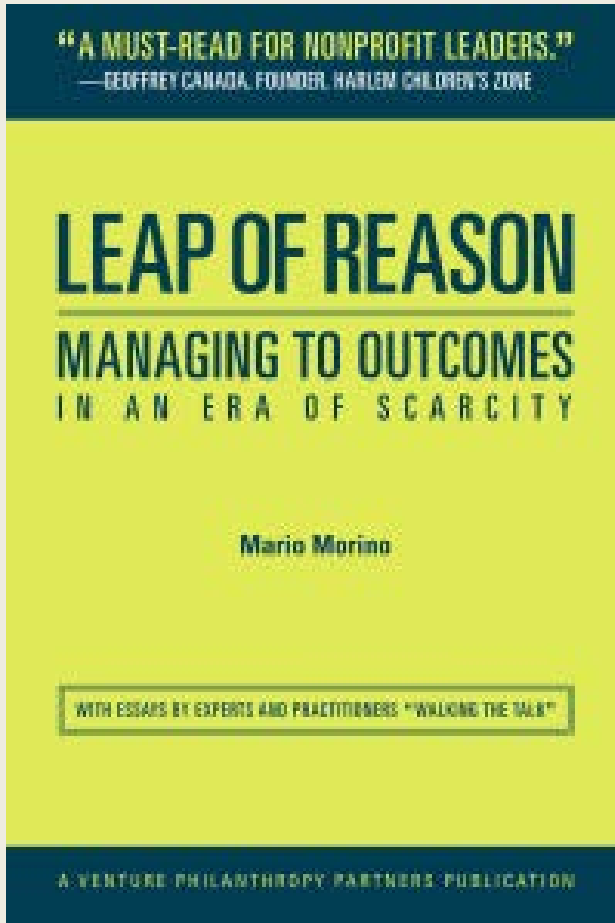
Who is Whole Whale?



We are a **digital agency** that leverages web data and technology to increase the impact of organizations.

DIGITAL IMPACT CHASM





“We’re lost, but at least we’re making great time”

- Leap of Reason

IMPACT MARKETING FUNNEL

WHOLE WHALE

CLIENT



COMMITTED

People donate to your organization

WholeWhale.com/University

~~\$120~~

Free for AC
members



WHOLE WHALE
UNIVERSITY

INTRODUCING WHOLE WHALE UNIVERSITY

ONLINE CLASS SERIES FOR NONPROFITS

We create the best online courses on digital topics that will help you amplify the awesome work your org is doing. To date, Whole Whale University has had **over 500 students** go through our courses.

ENROLL IN WWU COURSES



GOOGLE ADWORDS GRANT FOR NONPROFITS

We want to help you spend \$120,000 in Google's advertising money next year.



BE YOUR OWN SOCIAL MEDIA GURU

Don't blindly follow the latest social media fads and gurus to guide your social media strategy.



IMPACT HACKING: DIGITAL STRATEGIES FOR NONPROFITS

Nonprofits can adopt the "growth hacking" mentality and harness it for good - which is why we are excited to bring you this course on

#ACNP17

Whole Whale Resources



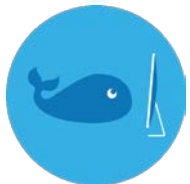
Google Resources - [WholeWhale.com/Google](https://www.wholewhale.com/google)

Tons of helpful training articles



Video Trainings - [WholeWhale.com/TV](https://www.wholewhale.com/tv)

Free digital strategy YouTube series



Online course - [WholeWhale.com/University](https://www.wholewhale.com/university)

Google AdWords for Nonprofits



Nonprofit Podcast - [WholeWhale.com/podcast](https://www.wholewhale.com/podcast)

Stories of tech in the nonprofit world podcast



Grow Your Matching Gift Revenue with Double the Donation

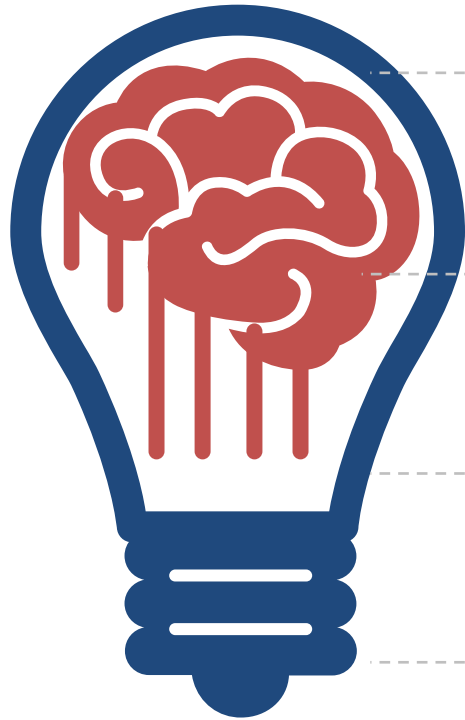
Adam Weinger

President of Double the Donation

<https://doublethedonation.com>

adam@doublethedonation.com

Matching Gifts Are a Revenue Generating Opportunity for You



1. Lack of Awareness

Many donors have never heard of matching gift programs



2. Unknown process

Many donors have no idea how to submit their matching gifts



3. Just forgot

Well intentioned donors mean to submit their matches but just forget



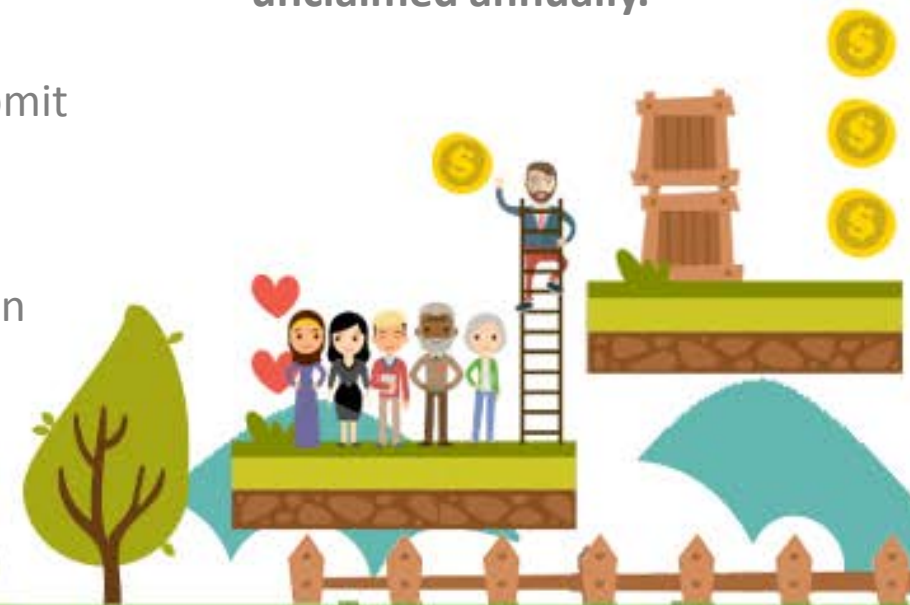
4. Lack of Actionable Data

Nonprofits don't have the information they need to go after the funds

It's estimated that

\$4-\$7 Billion

in matching gift funds go unclaimed annually.



Special Offers for America's Charities Members

Option #1:

New Double the Donation clients receive Double the Donation's Premium Plan for free, a value of \$499/year.

Option #2:

New Double the Donation clients can receive a one-time discount of \$499 off Double the Donation's 360MatchPro product.

Option #3:

Existing Double the Donation clients can receive a one-time discount of \$999 off Double the Donation's 360MatchPro product.



New Double the Donation Clients Can Receive Double the Donation's Premium Plan for Free



https://**ON YOUR WEBSITE**

copy our matching gift code



paste it into your site



See if your employer will match your donation!

Enter the name of your company:

Matching Gift and Volunteer Grant information provided by



Microsoft

Contact Info

Forms:	https://easymatch.com/microsoft
Guidelines:	http://www.microsoft.com/about/corporatecitizenship/en-us/serving-communities/community-opportunities/employee-giving/
Corporate Contact:	Matching Gifts Customer Support ☎ (800) 480-4438 ✉ MS@easymatch.com

Matching Gift Programs

Offered:	✓ Yes
Minimum Matched:	\$25
Maximum Matched:	\$15,000
Match Ratio:	1:1
Full-time employees, spouses, and board eligible?	✓ Yes
Part-time employees eligible?	✓ Yes
Retirees eligible?	✗ No

Microsoft matches employee donations to most nonprofits including:

- Educational institutions (K-12 included)
- Health and human services
- Arts and cultural organizations
- Civic and community organizations
- Environmental organizations
- And many other nonprofits

Microsoft's Matching Gift Submission Process:

Employees / donors can submit their matching gift requests electronically at <https://easymatch.com/microsoft> or at <http://give>.

Note: Employees must be connected to the company intranet to access the above links.

Additional details of the matching gift program can be found at <http://doublethedonation>

New Double the Donation clients receive a \$499 discount on 360MatchPro and existing clients receive a \$999 discount on 360MatchPro



Identification

Can you **identify as many matching gift donors as possible** using all the strategies available?



Outreach

Can you **automatically provide donors with the right information at the right time** to get them to submit their matches?



Actionable Insights

Can you **enable the nonprofit professionals** who are responsible for their matching gift revenue **to focus on the top opportunities that bring in the big dollars?**

360MatchPro's matching gift marketing automation and features are designed to help large organizations substantially grow their matching gift revenue

Breakdown by status - All		
Status	Count	Sum
Waiting for Donor	624	\$1,841,098
Verification Needed	211	\$759,560
Pending Payment	159	\$684,910
Match Complete	192	\$769,320
Unknown Employer	742	\$2,678,755
Ineligible	45	\$180,200

Breakdown by status - Top 100		
Status	Count	Sum
Waiting for Donor	28	
Verification Needed	12	
Pending Payment	8	
Match Complete	8	
Unknown Employer	40	
Ineligible	4	

Top records

Showing 1 to 25 of 780 entries (filtered from 1,973 total entries)

Previous 1 2 3 4 5 ... 32 Next

Date	First Name	Last Name	Amount	Email	Company Name	Status
6/3/2016	Nicklaus	Schuster	\$10000	Nicklaus@rogerscorp.com	Rogers Corporation	Waiting for Donor MG VG
4/21/2016	Cassandra	Grant	\$10000	Cassandra@live.com	YUM Brands (Pizza Hut, KFC, Taco Bell)	Waiting for Donor MG
3/11/2016	Madaline	Sauer	\$10000	Madaline@save-farmers.com	Farmers Insurance Group	Waiting for Donor MG
4/19/2016	Lorna	Mohr	\$10000	Lorna@yahoo.com	STMicronics	Verification Needed MG
6/4/2016	Candida	Frami	\$9900	Candida@collierenterprises.com	Collier Enterprises	Waiting for Donor MG

Cat Rescue Club | Donations | Views | Reporting | **Automation** | Setup | Logins | Logout

Automated Emails - Matching Gift Eligible

Variable	Description
{{donor_last_name}}	Donor last name
{{matched_company_info}}	Company information if a match was found
{{matched_company_name}}	Company name if a match was found
{{indicate_ineligible_link}}	Link that users click to indicate that user deems donation to be ineligible
{{donor_email}}	Donor email address
{{divider}}	Horizontal divider
{{donor_first_name}}	Donor first name
{{indicate_match_submitted_link}}	Link that users click to indicate that the user submitted a request
{{plugin_link}}	Link to the dedicated matching gift page where our plugin is installed

Match Eligible
Unknown Eligibility
Likely Ineligible

Initial email sent to match eligible donors

ON Send email after 0 hours

Formats - **B** / *I* [List Icons]

Dear {{donor_first_name}},

Your donation of {{donation_amount}} is eligible for a matching gift from {{matched_company_name}}!

Please see the below instructions and documentation to submit a matching gift request.

Once you've submitted your matching gift request, please click the following link to let us know!
 {{indicate_match_submitted_link}}

If your company doesn't offer a matching gift program or won't match your donation, please let us know by clicking the following link:
 {{indicate_ineligible_link}}

Regards,

Ashley Stevenson
 Cat Rescue Club
 Matching Gift Team
 matchinggifts@catrescueclub.org

{{matched_company_info}}

P

Follow-up email if donor didn't indicate whether they submitted the match, or indicate that they're ineligible for a matching gift

ON Send email after 192 hours

Formats - **B** / *I* [List Icons]

Hi {{donor_first_name}},

I wanted to check in to see if you had a chance to review my previous email. We think there's a good chance your company, {{matched_company_name}}, offers a matching gift program which can make your recent donation of {{donation_amount}} help