

Matching Gifts/ Commemoratives

The **Matching Gifts** module tracks those situations in which companies and organizations match the charitable donations of their employees. The software manages the matching parameters – percentage, limits, begin/end date of campaign, etc. Users appreciate the efficient communication tools of the module: statements to donors noting contribution amount as well as the amount matched, statements to the cooperating organization indicating the amounts qualifying for matching.

Features and Benefits

- Indicate the donors who meet the matching gift requirements, generally through employment or association affiliation.
- Manage matching pledges for organizations as well as “challenge” situations, e.g., one pediatrician challenging other pediatricians to give and match.
- Track matching gift parameters: begin/end date of campaign, percent of gift that will be matched, limit per qualified gift, overall limit.
- Print statements for donor to indicate the gift plus matching amounts.
- Print statements for organization to indicate the amounts that qualify to be matched and produce in desired time period — daily, weekly, some specified time period.
- Increase productivity by ensuring donors’ gifts are adequately and securely managed.
- Reduce record-keeping time in order to give more time to donors and interested groups.

The **Commemoratives** module tracks gifts given in honor or in memory of individuals or organizations. Users note the relationship of the person or group, and to whom acknowledgement should be directed. The efficiency of the system becomes a tool for encouraging giving by others who see the secure handling of these unique donations.

Features and Benefits

- Accept gifts in honor of or in memory of individuals.
- Track the number of gifts received in each category.
- Identify the relationship of person or group to the organization and to whom acknowledgement for the gift is sent.
- Use a word processing file to produce and print personalized letters.
- Increase productivity by ensuring donors’ gifts are adequately and securely managed.
- Reduce record-keeping time in order to give more time to donors and interested groups.

Required Modules:

- Donor and Gifts

Matching Gift Information

Name: [EPS Technologies (#21) Cordova, TN] ...
 Description: [Employer Matching]

1. Basic Info. | 2. Individuals Covered | 3. Memo

Begin Date: [1/1/2011] ... Ending Date: [12/31/2011] ...
 Is This Item Still Used?
 Motivation: [GENERAL] ... [General]
 Percent: [10.00%]
 Limit/Gift: [\$0.00]
 Overall Limit: [\$25,000.00]
 Print Match

Date First Gift: _____

Commemorative Information

Name: [Glenn Thompson Memorial]

1. Basic Info. | 2. Acknowledgements | 3. Gifts | 4. Memo **

Memorial?
 Honorarium?

Anticipated Amount: [\$50,000.00]
 Gifts Received: [\$475.00] Date Last Gift: [7/10/2011]
 Remaining: [\$49,525.00] # gifts: [8]
 Date Closed: [12/31/2011] ...

[Apply] [OK] [Cancel]

Want a good incentive for individuals to give donations? Ask employees or churches to match every donation dollar for dollar.

Commemoratives makes it easy to track gifts to memorials and honorariums.