



MATCHING CONTRIBUTIONS IN INDIA

A toolkit for NGOs on how to design and execute
matching campaigns

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Study commissioned by	A.T.E. Chandra Foundation
Research and writing	Aashika Ravi, Abhineet Nayyar, Ambika Jugran, Shivani Desai, Yashasvi Murali (Sattva Research)
Editing	Aarti Mohan
Project advisors	Deepa Varadarajan and Manasa Acharya (Pramiti Philanthropy Partners), Komal Goyal and Priyaka Dhingra (A.T.E. Chandra Foundation)
Design and typesetting	Bhakthi Dakshinamurthy (HolyF Design), design.holyf@gmail.com
Contact	research.advisory@sattva.co.in

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What is a matching campaign?

A matching contribution is based on the idea of creating a multiplier effect from a limited pool of funds. The multiplier effect can be achieved in a number of ways, including activating new donors and/or encouraging existing donors to give more. In a matching contribution, a donor agrees to unlock a grant or a donation, once the

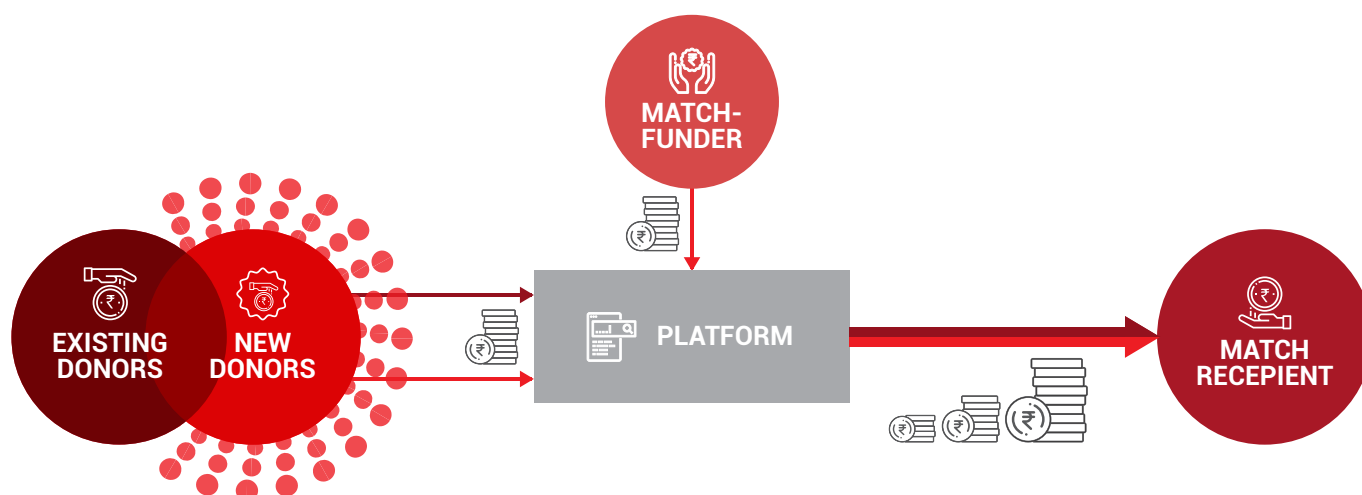
recipient is able to raise an equal or more amount from other donors. It helps to promote financial sustainability among recipients by diversifying their donor base and amplifies the impact of the donation made. When a matching contribution is designed to raise funds during a definite period of time, it is called a matching campaign.

Key Stakeholders

 MATCH-FUNDER	The match-funder is the entity who commits to match funds raised from individual donors with a donation. The match-funder could be a corporate, an individual philanthropist, a foundation, or the platform hosting the matching campaign.
 MATCH RECIPIENT	The recipient is the entity who desires to raise funds for a cause, and receives the total funds raised once the matching campaign ends. The match-recipient could be a Non-Governmental Organisation (NGO), or an individual fundraiser.
 PLATFORM	Platforms are online donation portals used to facilitate transactions that occur during a matching campaign. Platforms also design and execute their own matching campaigns and invite NGOs to participate in them. Alternatively, a payment gateway on the NGO's website can also be used to facilitate the matching campaign.
 INDIVIDUAL DONOR	An individual donor is a retail giver or an employee of an organisation who donates funds to support a matching campaign, which is later matched by a match-funder.

A matching campaign can take different forms depending on the objectives - from a family foundation matching retail donations with a single grant to a corporate

matching employee volunteer time with funds. Each of these different models of matching is further detailed and supported with case studies in the sections to follow.



Why this toolkit on matching campaigns?

The rapid growth in online giving through crowdfunding, payroll and e-commerce portals is transforming the giving ecosystem. This provides an opportunity for NGOs to explore innovative fundraising models and unlock additional funding from a diverse donor base. On the other hand, seasoned philanthropists are also seeking opportunities to multiply the impact of their limited contributions and build the fundraising capabilities of their grantee partners in the process. In this regard, matching campaigns show great promise in meeting the distinct objectives of these stakeholders.

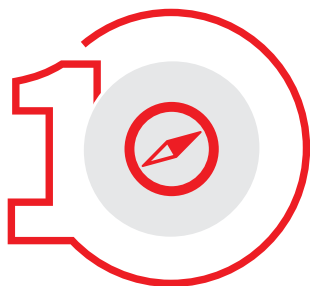
While matching campaigns have immense potential, there is a great deal of ambiguity amongst NGOs on how to effectively design and execute a matching campaign.

Sattva, with support from A.T.E. Chandra Foundation, has created this toolkit on a 3-step process of **'Explore - Identify - Learn'**, with the aim to demystify what it takes to operationalise a matching campaign. It will serve as a guide to NGOs on the various steps involved in executing a matching campaign including key stakeholders, components, and different models of matching.

This toolkit is a segment of a '2-part reader' that collectively aims to drive the usage of matching campaigns for the development sector in India. Through case studies of organisations that have successfully navigated this space, this toolkit intends to encourage NGOs of various sizes and types to explore matching campaigns.

How to read this toolkit?

This toolkit acts as a roadmap to creating and executing a matching campaign, and can be broadly categorised as:



EXPLORE

The concept of a matching campaign, and understand its various components, including key stakeholders and design levers



IDENTIFY

The most suitable and relevant matching model for you, based on your organisation's alignment to the prerequisites and your network



LEARN

How to plan, design and execute an effective matching campaign for the selected matching model

What are the components of a matching campaign?

A matching campaign is composed of multiple components explained below. Some of these are driven by the NGO, while others are determined by the match-funder or the platform.



CAUSE

The specific purpose for which funds are being raised



GOAL

The objective to participate which could be across
a) raising funds,
b) expanding donor base, or
c) enhancing visibility



COMMUNICATION

The communication strategy before, during and after a matching campaign (includes frequency, target audience and nature of communication)



DURATION

The duration for which the matching campaign is open to receiving donations



SEASONALITY

The time period during which the matching campaign is executed (may be influenced by the festival season and/or the tax-saving window)

MATCHING CAMPAIGN



MEDIUM

The offline (cheques) or online (through the use of a donation portal or on the payment gateway of an NGO's website) modes of facilitation



MATCHING FUNDS

The maximum amount of total funds that the match-funder will donate as part of the campaign



MINIMUM THRESHOLD

The minimum amount that an individual donor must donate to be considered as part of the matching amount



MATCH CAP

The maximum amount per individual donation at which the matching funds will be allocated



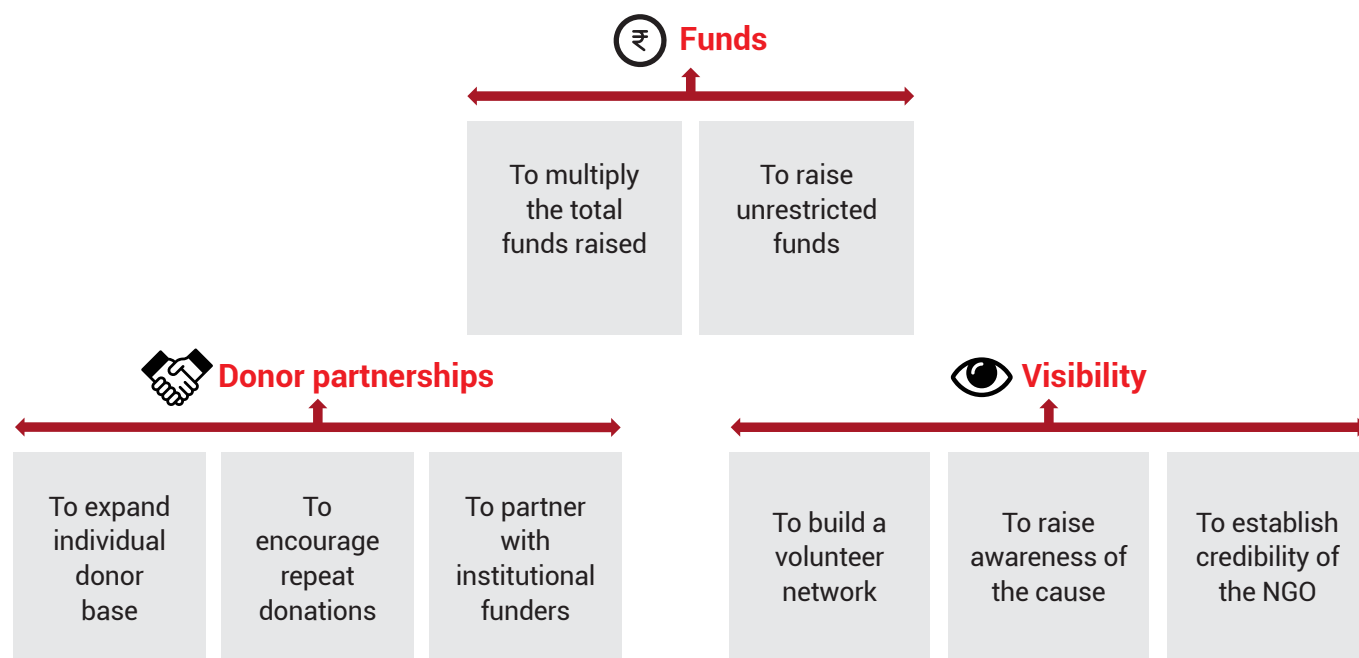
MATCHING RATIO

The ratio in which the match-funder will donate for every donation received from an individual donor

Sattva's findings and insights on select components of a matching campaign are detailed below.

1. GOALS

NGOs participating in a matching campaign typically have one or more of the following goals:



2. MEDIUM OF COMMUNICATION

Online and instant messaging platforms such as Facebook, WhatsApp, Instagram are popular modes of communication leveraged during matching campaigns. They are effective in reaching both dormant and first-time givers at a low cost. In contrast, offline modes of communication are primarily used by organisations interested in tapping into a hyperlocal network.

Swadhar IDWC Pune participated in a Navratri event where they put up a stall selling items made by their beneficiaries. One of the volunteers explained the work of Swadhar and the danaMATCH Challenge as part of the event announcements. They also distributed physical printouts of the URL to their donation page which donors could take home to make the donation.

3. TARGET AUDIENCE

Narrowing down on a specific target audience and targeting communication towards that network enhances the likelihood of success in a matching campaign.

Akshaya Patra identifies inactive donors and targets them to raise funds during matching campaigns. The presence of a match serves as a nudge or trigger to individuals to make donations to the cause.

4. PLATFORM

The following criteria are important when selecting a platform to execute the matching campaign:

- The process of registration for an NGO
- The nature of data analytics support provided by the platform
- Transaction fees or commissions charged
- Level of transparency with respect to sharing individual donor data

5. MESSAGE

Use of storytelling to communicate during a matching campaign is key to success. Constructing a story with an emotional appeal, adding anecdotes from the field, tying it to the availability of a match and the objective of the campaign motivates people to give more. Presenting problems with embedded solutions also helps in engaging the audience.



What are the types of matching models?

Sattva has classified matching models in India into three broad categories based on the type of match-funder. An NGO can maximise its chances of

success by exploring suitable models that align its strengths with the model's prerequisites (nature of resources and capabilities required).



MODEL 1: CORPORATE AS A MATCH-FUNDER

Corporates match the funds donated by their employees and/or volunteering time spent by their employees to approved NGO partners in a predetermined ratio.



MODEL 2: FAMILY FOUNDATION AS A MATCH-FUNDER

Family foundations match funds raised by an NGO from retail givers and/or other institutional donors with their own funds in a predetermined ratio.



MODEL 3: PLATFORM AS A MATCH-FUNDER

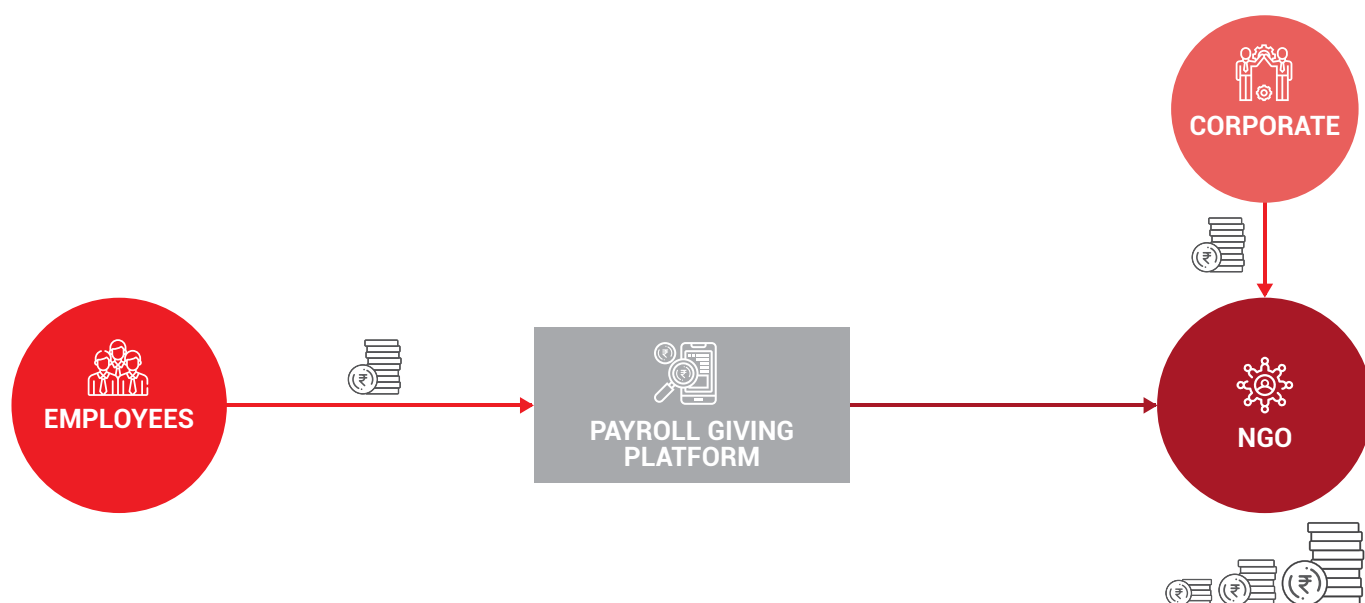
Platforms run seasonal matching challenges in which they commit to match the funds raised by NGOs with their own funds in a predetermined ratio.

MODEL 1: CORPORATE AS A MATCH-FUNDER

Globally, a large number of corporates offer structured matching programmes as a part of their overall sustainability and employee engagement initiatives. Some of these include General Electric (GE), Johnson & Johnson, Soros Fund Management, PepsiCo, Apple, Google, Bloomberg, and Hewlett-Packard (HP). In comparison, fewer corporates in India offer such programmes, largely owing to a limited focus on employee volunteering, ambiguity around the applicability of the CSR Act to matching funds, and

limited incentive to allocate a separate pool of funds to employee matching programmes.

Sattva believes that NGOs can play a significant role in educating corporates about the multiplier effect of matching programmes and initiating partnerships with them. Given the nascency of matching in India, and that such programmes are driven by policy, NGOs can prioritise exploring partnerships with long-standing corporate donors.



*Alternatively, corporates may commit to match employee volunteering hours with funds to approved NGOs.

Prerequisites for NGOs

1. EXISTING CORPORATE PARTNERSHIPS: A few strong corporate partnerships as a starting point to explore conversations around employee donation or employee volunteering matching programmes. This is particularly important given the limited awareness around these programmes, and limited existing corporate initiatives that an NGO could directly apply to.

2. IMPACT STORIES AND COLLATERAL: Strong documentation of stories, from the perspective of beneficiaries, volunteers or team members to support communication. These can be leveraged by the corporates for internal communication towards rallying support for the NGO's work and mission.

EMPLOYEE DONATION MATCHING PROGRAMME

3. PRESENCE OF A PLATFORM: An online donation portal to effectively track donations received from employees. The campaign can be hosted on the corporate's payroll giving system, the NGO's payment gateway, or an independent workplace giving platform.

EMPLOYEE VOLUNTEERING MATCHING PROGRAMME

4. OPPORTUNITIES TO VOLUNTEER: Availability of meaningful volunteering opportunities that can be leveraged to run employee volunteering matching campaigns. The greater an NGO's ability to effectively engage employees, the more likely it is for a corporate to host a matching programme.

5. INTERNAL RESOURCES: Allocation of 1-2 resources to manage employee orientation, communication, logistics and on-ground execution of the volunteering activities. In most cases, the corporate may appoint an internal SPOC / volunteer champion or even employ a centralised software to track the volunteering activities and hours spent.

Key considerations and best practices

1. OUTREACH AND PARTNERSHIPS:

a. Select global corporates allow NGOs to directly 'apply' to be a part of their employee matching programmes (irrespective of a prior relationship). These corporates usually have the eligibility and selection criteria explicitly mentioned on their websites. NGOs looking to explore corporate partnerships, should look out for such open-source opportunities.

b. NGOs must make use of communication tools to build awareness on the value of matching programmes for corporates. This could include presentations, sharing of data or examples of other corporates who run successful matching programmes.

2. COMPONENTS:

a. In this model, the matching amount, matching ratio, matching cap and minimum threshold are determined by the corporate. These components are driven by the corporate's ability to allocate a pool of matching funds either separately or from their existing CSR budget.

b. The duration of the matching programme could range from a month to a year, depending on the goal and outcomes. Corporates new to matching may prefer to test out the programme for smaller durations during festivals or other periods of significance.

3. COMMUNICATION:

a. NGOs must document volunteer experiences and leverage the same in collateral towards inspiring greater employee participation and volunteering.

b. NGOs must align on collateral templates and content with the corporate beforehand. This helps to minimise back and forth on communication over the course of the campaign.



1. IDEATE

1.

IDENTIFY MATCH FUNDER

Shortlist for strong relationships from existing corporate network

2.

DEVELOP A PITCH

Articulate support required and potential impact for stakeholders

3.

CONDUCT OUTREACH

Highlight any peer corporate examples to inspire confidence

4.

ALIGN ON PROGRAMME

Include cause, match cap, ratio, medium, duration, and roles



2. DESIGN

1.

UNDERSTAND EMPLOYEE INTERESTS

Include areas of expertise, with support from the corporate team

2.

IDENTIFY VOLUNTEERING OPPORTUNITIES

Align opportunities to employee interests and NGO needs

3.

CREATE ENGAGEMENT CALENDAR*

Include presentations, volunteering activities, field visits

4.

IDENTIFY EMPLOYEE CHAMPIONS

To help support on logistics and induction

*In case of employee donation matching programmes, the NGO could directly jump to Step 3



3. EXECUTE

1.

CREATE COLLATERAL*

Include cause, NGO requirements, match, and potential impact

2.

ORIENT EMPLOYEES

Align on the roles, expectations and programme delivery

3.

EXECUTE ON CALENDAR

Manage logistics, solicit feedback, document experiences, and track hours

4.

ALIGN ON FUNDS RAISED

Coordinate with the corporate on progress and total funds raised

*In some cases, the corporate owns internal communication and NGOs only need to share information in standardised templates

Case Study

Foundation for Excellence's model of leveraging alumni networks to initiate matching programmes

NAME OF NGO FOUNDATION FOR EXCELLENCE (FFE)	CAUSE Need and merit-based scholarships for first generation learners	GOAL To raise scholarship funds for 250 students	INITIATOR FFE alumni
NAME OF MATCH-FUNDER Cognizant Foundation	INDIVIDUAL DONORS FFE alumni employed in Corporates	NUMBER OF INDIVIDUAL DONORS 673	MATCHING RATIO 1:1
FUNDS RAISED ₹50 Lakh (FY 2018-19)	MATCHING FUNDS RAISED ₹50 Lakh (FY 2018-19)	DURATION OF CAMPAIGN 9 Months	MEDIUM Online (FFE's website)

BACKGROUND ON FFE:

FFE acts as a catalyst that changes the lives of academically brilliant students. It awards scholarships to promising students who are extremely bright and talented, but come from financially constrained backgrounds. These scholarships are granted to students who have not only scored in the top percentile of Technology, Engineering and Medical state and national entrance exams, but have also been accepted to highly regarded and reputed institutions in India.

EVOLUTION OF PARTNERSHIP AND MATCHING PROGRAMME:

1. FFE leverages alumni who have been previous scholarship awardees, and are now working in corporates to initiate matching campaigns with both individual philanthropists and corporates. These campaigns and events organised by employees are then matched by the corporate.
2. In the years 2015-16 and 2016-17, FFE received a grant from a donor (₹10 lakh) which was used as a 'pilot' to initiate a matching campaign with FFE's alumni. In both years, FFE's alumni donations exceeded the matching grant amount and FFE saw an increase in the number of alumni donors and their contributions.
3. FFE presented this data to Cognizant Foundation to explore the possibility of setting up a matching campaign. Cognizant Foundation was in alignment with FFE to support student scholarships and promote giving among alumni, and agreed to establish the matching campaign. It was launched in 2016-17 with an amount of ₹50 lakh from Cognizant Foundation.

EXECUTION OF THE CAMPAIGN:

1. FFE designed a campaign for a period of 9 months which focused on promoting giving by its alumni and targeted a range of alumni including recent graduates and more experienced alumni. Different strategies were employed to target different alumni segments, and these were regularly monitored and evaluated through the campaign.
2. FFE also tapped into seasonality in giving during certain times of the year to successfully raise funds and meet campaign targets.
3. FFE was entirely responsible for raising the funds, designing the campaign strategy and implementing the programme. Cognizant Foundation provided updates to its Board and employees on the success of the programme and its impact upon completion of the campaign.

RESOURCES:

FFE executed the campaign with a 3-member team. The team leveraged emails, LinkedIn, Facebook, newsletters, events and telephone calls to communicate with alumni to promote the cause and mobilise donations.

BEST PRACTICES:

1. FFE's alumni are a testimony to the success and potential of the FFE scholarship programme. FFE scholars play a critical role in convincing corporates of the potential impact of their donations towards FFE's scholarship programme.
2. Communication to FFE's alumni clearly stated that their contributions will be matched and the importance of giving was emphasised in all communication to them.
3. Alumni were encouraged to motivate their colleagues to donate by being role models themselves, and contributed to the success of the programme. The FFE alumni working at Cognizant championed the cause and created a buzz around the campaign internally.
4. FFE was able to capture the impact of the total funds raised and the multiplier effect through the matching campaign. The impact could be clearly articulated, as the scholarship amount raised was used to support a certain number of students. It was hence possible to make a pitch that was easy to understand.
5. All amounts of donations by alumni were encouraged, with no minimum contribution amount.
6. FFE worked on building a rapport with alumni through the year, as opposed to one-off aggressive outreach, and this contributed to successful giving by alumni.

SCOPE FOR IMPROVEMENT:

1. Maintaining a robust database of alumni with up-to-date contact information could have helped in reaching the alumni with minimal effort. There is a need to allocate considerable resources and time to build this database.
2. Running an agile campaign and consistently revisiting the communication strategy could have helped to reach the right audience for raising funds.

“We focus on the importance of giving and inculcate a giving culture among our students so there is an inherent motivation for them to give back when they start earning. Our alumni have ensured sustainability in the matching model by not only giving themselves but also encouraging giving among their employers and colleagues.”

- Sudha Kidao, Managing Trustee, Foundation for Excellence India Trust

Case Study

Goonj's experience of mobilising retail donations in partnership with a corporate in support of disaster relief

NAME OF NGO GOONJ	CAUSE Disaster relief	GOAL To raise funds for relief and rehabilitation in Nepal and India	INITIATOR Flipkart
NAME OF MATCH-FUNDER Flipkart and Flipkart's promoters	INDIVIDUAL DONORS Flipkart employees and customers	NUMBER OF INDIVIDUAL DONORS More than 1000	MATCHING RATIO 1:1
FUNDS RAISED (employees and retail givers) ₹81 Lakh	MATCHING FUNDS RAISED ₹93 Lakh	DURATION OF CAMPAIGN 9 weeks	MEDIUM Online - Flipkart website

BACKGROUND ON GOONJ:

Since 1999, Goonj has built a network of communities from urban to village India, chanelising material as a tool to address crucial gaps in rural infrastructure, water, environment, livelihood, education, health, disaster relief and rehabilitation. Its engagement with both the urban and rural population has galvanised a mass civic participation in addressing basic but neglected issues.

EVOLUTION OF PARTNERSHIP AND MATCHING PROGRAMME:

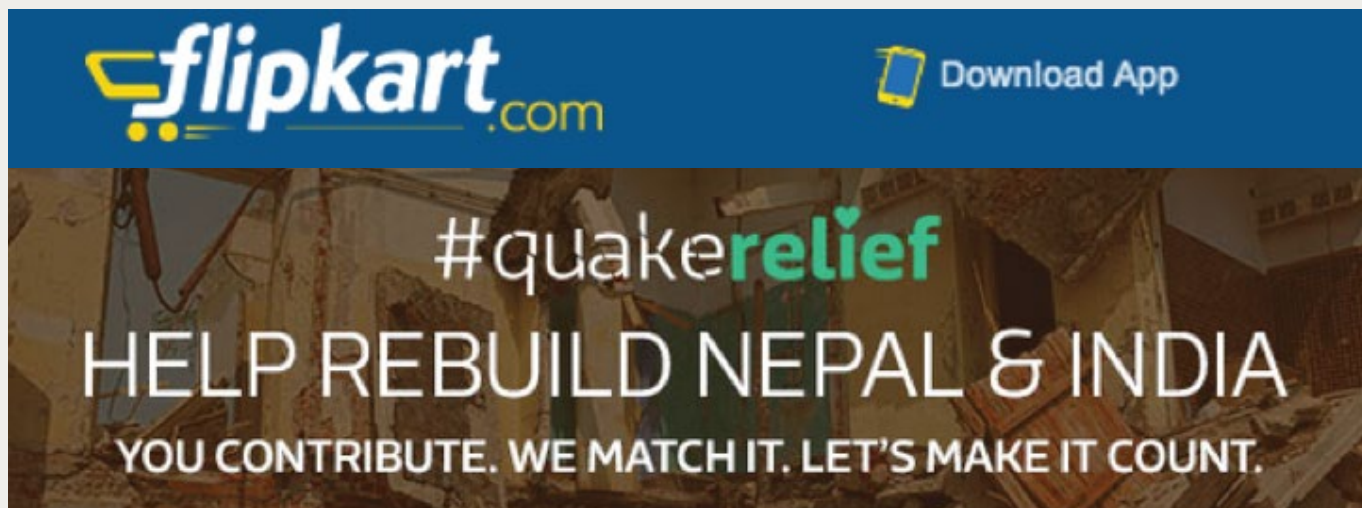
1. In April 2015, Goonj launched a massive campaign 'Rahat Quake' in support of relief and rehabilitation efforts in Nepal and India. At the time when the quake hit, Flipkart wanted to find the fastest way to provide support for the victims and a reliable partner to channel the efforts, and thus reached out to Goonj.
2. Flipkart committed to match the contributions that came in from employee and customer donations. Both organisations worked together to mobilise support for the cause, leveraging Flipkart's resources and reach and Goonj's credibility.

EXECUTION OF THE CAMPAIGN:

1. A targeted online channel was set up on Flipkart's website to enable employees, customers and partners to extend their support, and messages seeking donations were put out. Goonj also tapped into its 500+ network of volunteers, individual donors and corporates to promote the campaign.
2. Communication included short and precise emailers, social media posts and updates on the portal, which clearly stated the degree of damage caused by the disaster, the support required, and Flipkart's commitment of a match. These were created by Flipkart and reviewed by Goonj to ensure that it met their guidelines for creatives.
3. The campaign was primarily focussed on raising as much as possible through Flipkart's customer base. Post campaign, Goonj shared periodic updates and impact stories from the field on its social media platforms.

RESOURCES:

Goonj team comprised of two members who used emails and also interacted with potential contributors directly to answer queries, build awareness and raise support.



BEST PRACTICES:

1. Communication from both the entities clearly stated that the amount raised on Flipkart's portal will be matched by Flipkart and will be used to procure essential relief materials.
2. All amounts of contribution were encouraged without any restrictions on the base amount.
3. Both the organisations, Goonj and Flipkart, leveraged their independent networks, which worked well for the campaign's success.
4. Consistent communication was maintained both during and after the campaign in the form of updates, social media posts, etc.

SCOPE FOR IMPROVEMENT:

1. Creating a database of target donors, based on their past donation patterns and other aspects, could have helped design more focused communication for different types of donors.
2. Given that the inflow of calls and emails is generally high during matching campaigns, allocating a separate team to handle all communication could have been helpful.
3. Sharing more real-time updates with donors for the duration of the campaign could have encouraged more number of donations.

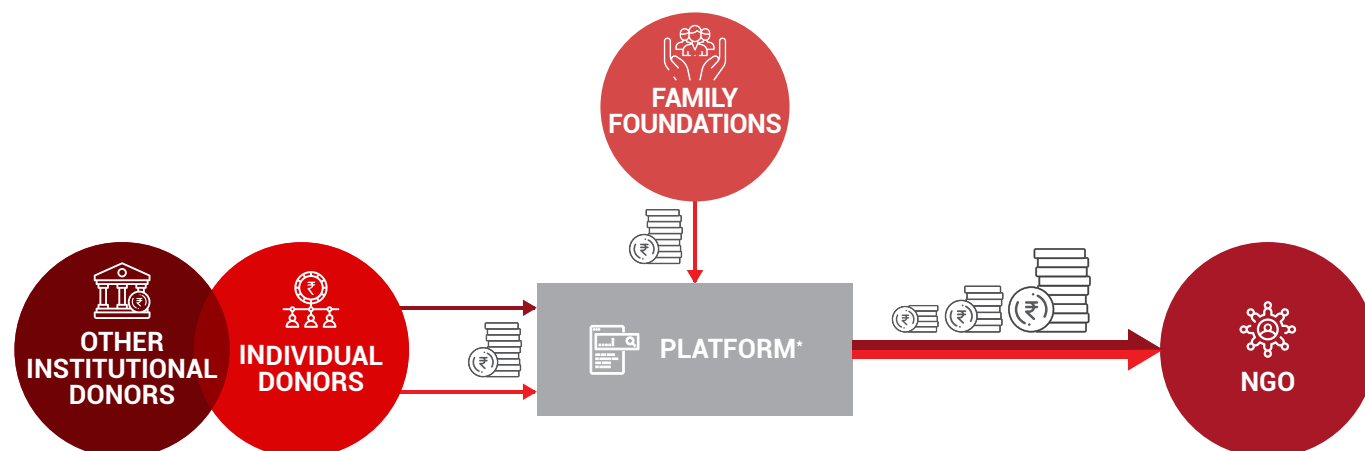
“It was encouraging to see how people came up in a big number to contribute to the cause. And how the strength and good relationships of both the organisations with people called *aam janta* helped the campaign to become so big.”

- Anshu Gupta, Founder, Goonj

MODEL 2: FAMILY FOUNDATION AS A MATCH-FUNDER

As with corporates, not many HNIs and family foundations have explored matching campaigns as a tool to multiply their contributions to social causes. This is largely due to the general lack of awareness regarding the value of matching campaigns for both the funders and the concerned NGOs. However, since

HNIs and family foundations are not tightly bound by policy, NGOs can leverage their support by educating and developing strong partnerships with HNIs and family foundations. Family foundations typically engage in matching campaigns either by matching retail funds or other institutional grants.



*In some cases, the Family foundation may choose to channel funds directly to the NGO (without involving an online platform).

Prerequisites for NGOs

1. EXISTING DONOR CHAMPIONS: A few strong donor (HNI/ family foundations) partnerships that can be tapped into to explore conversations around matching campaigns. An NGO may even leverage their founders, senior leaders or board members to bring conversations with potential match-funders to closure.

2. MAILING LIST: A comprehensive mailing list with names and contact details of volunteers, newsletter subscription base, active retail donors, dormant donors, formal or informal associations at a community, university alumni, or corporate level that could be reached out to during matching campaigns. Depending on the size and maturity of the NGO, the retail giver base could range anywhere between 100 to 1000.

NGOS LOOKING TO RAISE RETAIL DONATIONS:

3. SOCIAL MEDIA PRESENCE: An active social media presence and engagement on one or more platforms such as Facebook, Instagram, LinkedIn, etc., to maximise reach during the matching campaign. This can also help spread awareness about the cause and mobilise individual donations towards the matching campaign with minimal effort.

4. PRESENCE OF A PLATFORM: An online donation portal to effectively track retail donations received over the course of the matching campaign. The campaign can be hosted on the NGO's payment gateway, or an independent crowdfunding platform.

Key considerations and best practices

1. CAMPAIGN DESIGN:

a. In this model, the matching amount, matching ratio, matching cap and minimum threshold is determined by the HNI/ Family foundation and could be fixed after discussion with the NGO.

b. NGOs can consider product packaging when raising retail donations for matching campaigns. Causes related to education, children and healthcare are typically able to raise maximum donations due to their ability to productise the value of the donation. Example: ₹1,100 will help feed nutritious meals to one child for one year.

2. COMMUNICATION: NGOs are responsible for designing and developing the overall communication strategy for the matching campaign. There is limited support provided by the HNI or family foundation given they typically have lean teams. However, if the campaign is hosted on a platform, NGOs can avail basic support around communications.



1. IDEATE

1.

IDENTIFY MATCH FUNDER

Shortlist for strong relationships from existing network

2.

DEVELOP A PITCH

Articulate support required and potential impact for stakeholders

3.

CONDUCT OUTREACH

Highlight any peer foundation examples to inspire confidence

4.

ALIGN ON PROGRAMME

Include cause, match cap, ratio, medium, duration, and roles



2. DESIGN

1.

SELECT A PLATFORM

Review factors such as popularity, support provided, transaction fee

2.

SELECT TARGET GROUPS

Such as active/ dormant donors, volunteers, other networks

3.

CREATE A DISSEMINATION PLAN*

Select outreach channels, define frequency of posts and collaterals

4.

CREATE COLLATERAL

Include cause, NGO requirements, presence of match potential impact

*Alternatively, an NGO may choose to host the campaign on its own website. In that case, the NGO can jump to Step 2



3. EXECUTE

1.

CONDUCT OUTREACH

Communicate with TG via selected outreach channels

2.

USE DIVERSE COMMUNICATION TOOLS

Leverage social media, whatsapp, emails to engage with TG

3.

ENCOURAGE NETWORKS

Request teams/ networks to spread the word

4.

REVIEW AND RECTIFY

Factors such as funds raised, social media outreach, course correct

Case Study

Vidyadaan Sahayyak Mandal's first experience with an online retail based matching campaign

NAME OF NGO VIDYADAAN SAHAYYAK MANDAL (VSM)	CAUSE Education	GOAL To raise ₹15 lakhs to support the education of 25 girls	INITIATOR Caring Friends
NAME OF MATCH FUNDER Caring Friends	INDIVIDUAL DONORS Retail givers	NUMBER OF INDIVIDUAL DONORS Over 700 (including 200 new donors), ^30-40%	MATCHING RATIO 1:1
FUNDS RECIEVED FROM RETAIL ₹17 Lakh	MATCHING FUNDS RAISED ₹17 Lakh	DURATION OF CAMPAIGN 6 Weeks	MEDIUM Online - Ketto

BACKGROUND ON VSM:

Vidyadaan Sahayyak Mandal (VSM) is a registered charitable trust in Maharashtra, which works in the field of education by supporting students from economically weaker sections of society to realise their dream of completing education and becoming self-sufficient. VSM practices a 'mentor-student' model whereby the students are groomed to become educated, self-reliant and socially sensitive citizens.

EVOLUTION OF PARTNERSHIP AND MATCHING PROGRAMME:

1. VSM aimed to support higher education of 25 economically backward girls in Murbad (Thane) and estimated ₹5 lakh as the fundraising goal. Their long-standing donor of ten years, Caring Friends (CF), came forward to support and encourage VSM as the match-funder.
2. CF encouraged VSM to revise the target from ₹5 lakh to ₹7 lakh, then to ₹10 lakh and finally to ₹15 lakh.
3. With this continuous encouragement and strong support for an increased amount of matching contributions from CF, VSM not only reached the target but overshoot the same to collect ₹17 lakh which was matched by CF.

EXECUTION OF THE MATCHING CAMPAIGN:

1. VSM reached out to over 500 individual donors from their existing database at the beginning of the campaign and approximately 200 new individual donors during the course of the campaign.
2. Student success stories in the form of videos and photos formed the majority of the campaign communication.
3. VSM proactively improved the quality and frequency of online communication to course correct for the low donations recorded in the first week. It also began providing assistance to retail givers to make donations through the online platform or alternate mediums wherever required.

The campaign was executed on Ketto, who supported VSM in a variety of ways:

4. Hourly and daily updates provided by Ketto on its dashboard helped VSM track and analyse the data.
5. Instant emails were sent to the donor to thank them for the donation.

RESOURCES:

VSM is entirely run by its volunteer base of 275-300 volunteers who support all efforts of the NGO, including its fundraising campaigns, and an additional three part-time employees.

BEST PRACTICES:

1. Regular engagement and communication with Caring Friends through their partnership played a key role in Caring Friends coming forward to support VSM for a matching campaign.
2. All campaign communication clearly stated the total cost of supporting education for each student.
3. Transparency and low administrative cost of 3-5% was critical in generating confidence among donors and retail givers that 95-97% of funds were being used towards the cause.
4. Multiple modes of communication were used including emails, Facebook and Whatsapp. Upon project completion, a group photo of all beneficiaries and volunteers was sent to all donors with a thank you note.
5. VSM invited donors to attend its monthly meetings, annual day functions etc., with a view to enable donors understand their work better and the impact of their donations.

SCOPE FOR IMPROVEMENT:

1. Rigorous planning and having a dedicated team to handle communication and other aspects of the matching campaign could have helped maximise success.
2. Building capabilities of volunteers to better understand matching campaigns, networking and fundraising tactics could have helped engage donors effectively.
3. Expanding campaign-related communication to multiple social media platforms, including Instagram and LinkedIn, could have helped reach more types of donors.
4. Having an up-to-date and ready-to-use repository of collaterals and impact stories targeted at different types of donors, could have helped minimise efforts in developing communication for the campaign.

“Our strategy for the matching campaign was different from regular crowdsourcing campaigns and our team was greatly motivated to innovate and expand outreach. All communication focused on the impact of the funds on the life of the 25 girls and we shared their photos and videos across social media throughout the campaign.”

- Geeta Shah, Founder & Trustee, VSM

Case Study

Sanjhi Sikhiya's strategy of leveraging an event of significance to raise funds for their cause

NAME OF NGO SANJHI SIKHIYA	CAUSE Youth leadership to improve public education	GOAL To build visibility for their cause	INITIATOR Amit Chandra
NAME OF MATCH FUNDER A.T.E. Chandra Foundation	INDIVIDUAL DONORS Retail givers	NUMBER OF INDIVIDUAL DONORS 129	MATCHING RATIO 1:1*
FUNDS RECIEVED FROM RETAIL GIVERS ₹19.56 Lakh	MATCHING FUNDS RAISED ₹3.52 Lakh	DURATION OF CAMPAIGN 4 days	MEDIUM Online - GiveIndia

*1:1 upto ₹5,500 (Nov 12), 1:1 upto ₹550 (Nov 13-15)

BACKGROUND ON SANJHI SIKHIYA:

Sanjhi Sikhiya Foundation (SSF) runs the Punjab Youth Leaders Program, a two-year full time leadership development programme. It brings together individuals who have shown exceptional leadership potential. During these two years, the young leaders work towards improving the learning and governance in government primary schools in Punjab with community support. In the process, they hone their leadership values and competencies. The aim of the programme is to create a strong community of future leaders committed to transforming Punjab in the next 30 years.

EVOLUTION OF PARTNERSHIP AND MATCHING PROGRAMME:

1. SSF tried crowdfunding for the first time on November 12, 2019, on the occasion of the 550th birthday of Guru Nanak.
2. SSF connected with one of their supporters, Amit Chandra, regarding the campaign, who later announced on social media that any funds received on November 12 would be matched up to ₹5,500. This was their first matching campaign.

EXECUTION OF THE MATCHING CAMPAIGN:

1. The incentive of matching enabled SSF to both engage past supporters and mobilise new donors.
2. Traction on the campaign led SSF to extend it by an additional 3 days. They also reduced the match cap to ₹550. These timely tweaks in the campaign design further boosted the total number of donations and funds raised.
3. Since they were a new organisation and didn't have an 80G, they used the page of their partner organisation on GiveIndia, and created a separate campaign.
4. 50% of funds raised came from diaspora, which primarily composed of new donors. Although these were personal connections who had committed their support in the past, the campaign helped in actualising these commitments.
5. SSF used a 2-page overview of their organisation on the campaign page along with a video and shared it over Facebook, LinkedIn, and Whatsapp.

RESOURCES:

The campaign was run by the co-founder and a team of volunteers.

BEST PRACTICES:

1. Building a strong community of people who know about the NGO's work and consistently communicating with them helped to accelerate funding at the time of the campaign.
 2. Hosting a campaign during an event of significance and for a short duration helped create both, a sense of purpose and urgency for people to donate.
 3. Regular communication themed on Guru Nanak Sahib, kept the momentum going and the donors felt connected to the campaign.
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SCOPE FOR IMPROVEMENT:

1. Developing campaign-specific collateral as a part of the planning process could have been helpful.
2. Onboarding additional resources for the duration of the matching campaign could have helped enhance outreach.
3. Creating an up-to-date database with active and inactive donors before the launch of the campaign could have made the outreach process easier.
4. Making followup calls along with sharing posts/ emails could have helped with donor conversions.

MODEL 3: PLATFORM AS A MATCH-FUNDER

Platform as a match-funder is perhaps the most popular type of matching model in India today with respect to the volume of participating NGOs, retail funders and funds raised. This involves online donation portals such as GiveIndia, Danamojo, SmallChange, Milaap, Ketto, facilitating matching challenges on their websites to encourage large number of donations. The match-funds are either generated through the platform's own revenue or through the contributions of one or more HNIs or family

foundations. Although platforms run challenges throughout the year, they often capitalise on the seasonality in giving around festivals (such as Diwali) or tax-saving windows (from January to March).

Given that this is a fairly established matching model in India, NGOs can leverage their fundraising and communication strengths to capitalise on platform-led matching challenges.



*In some cases, Platforms can also act as a match-funder by using their own revenue in the campaign. In other cases, the campaign can be supported by Family Foundations

Prerequisites for NGOs

1. MAILING LIST: A comprehensive mailing list with names and contact details of volunteers, newsletter subscription base, active retail givers, dormant donors, formal or informal associations at a community, university alumni, or corporate level that could be reached out to during matching campaigns. Depending on the size and maturity of the NGO, the retail giver base could range anywhere between 100 to 1000.

2. SOCIAL MEDIA PRESENCE: An active social media presence and engagement on one or more platforms such as Facebook, Instagram, LinkedIn, etc., to maximise reach during the matching campaign. This can also spread awareness about the cause and mobilise individual donations towards the matching campaign with minimal effort.

3. IMPACT STORIES AND COLLATERAL: Strong documentation of stories, from the perspective of beneficiaries, volunteers or team members. These can be leveraged for external communication towards rallying support for the NGO's work and mission. The collateral must clearly clarify the presence of match to incentivise people to contribute.

Key considerations

1. CALENDAR OF EVENTS: Platforms such as GlobalGiving share a calendar of fundraising events with NGOs, informing them of the events that they could participate in, and thereby allowing them to plan well in advance for each.

2. SUPPORT TO NGOS: Platforms provide a range of support to NGOs such as helping them in their communication efforts, sharing details on commencement of campaigns, and providing regular updates on conversion rate of the matching funds.

3. FAIR CAMPAIGNS: In order to hold a fair competition and give smaller NGOs a chance to raise funds, platforms introduce elements such as maximum ticket size per individual donor, minimum number of individual donors to be engaged, etc.



1. IDEATE

1.

IDENTIFY PLATFORMS

Include important dates, other details as available

2.

SIGN UP FOR PLATFORM NEWSLETTER

To receive information on their upcoming campaigns

3.

CONNECT WITH PEERS

To understand how matching campaigns work

4.

UNDERSTAND REWARDS STRUCTURE

To understand terms and conditions to win matching donations



2. DESIGN

1.

LEVERAGE PLATFORM SUPPORT

Such as templates for emails, social media posts/ campaigns

2.

SELECT TARGET GROUPS

Such as active/ dormant donors, volunteers, other networks

3.

CREATE A DISSEMINATION PLAN*

Select outreach channels, define frequency of posts and collaterals

4.

CREATE COLLATERAL

Include cause, NGO requirements, presence of match potential impact



3. EXECUTE

1.

CONDUCT OUTREACH

Communicate with TG via selected outreach channels

2.

USE DIVERSE COMMUNICATION TOOLS

Leverage social media, whatsapp, emails to engage with TG

3.

ENCOURAGE NETWORKS

Some platforms allow peer-to-peer networking

4.

REVIEW AND RECTIFY

Factors such as funds raised, social media outreach, course correct

Case Study

Blind People's Association's experience on Danamojo GivingTuesday Challenge

NAME OF NGO BLIND PEOPLE'S ASSOCIATION (BPA)	CAUSE Support to people with disabilities	GOAL To increase visibility of BPA among individual donors	INITIATOR Platform
NAME OF MATCH-FUNDER Danamojo	INDIVIDUAL DONORS Retail givers	NUMBER OF INDIVIDUAL DONORS 175	MATCHING RATIO As decided by Danamojo
FUNDS RAISED ₹10.6 Lakh	MATCHING FUNDS RAISED ₹3.5 Lakh	DURATION OF CAMPAIGN 1 Month	MEDIUM Online - Danamojo

BACKGROUND ON BPA:

Blind People's Association (BPA) is a Gujarat-based NGO which believes in providing equal opportunities to all categories of people with disabilities. BPA's interventions include campus based education programmes, integrated education in villages, production training, employment assistance, cataract surgeries, and other community-based rehabilitation activities for people with disabilities. Retail givers and walk-in donors make up 60% of BPA's funding base.

EXECUTION OF THE MATCHING CAMPAIGN:

1. BPA tapped into their existing donor base of 4,200-4,500 individual donors at the beginning of the campaign (via emails/other one-to-one communication) and expanded outreach further.
2. They were ranked number 4 in the challenge and received a Special Mention Award of ₹10,000 for marketing and communication efforts.

RESOURCES:

BPA's fundraising team of three people executed the campaign and led communication efforts with existing and new donors.

BEST PRACTICES:

1. Putting up hoardings outside the office building with information on the campaign helped direct people to Danamojo's website and guided them on the donation process.
2. BPA's communication clearly stated that one person's cataract surgery cost ₹2,500, and that an individual contribution of the same amount could fund cataract surgeries of two persons under the matching campaign.
3. Apart from a home page banner, BPA used Facebook, LinkedIn and WhatsApp to market their campaign. BPA created special broadcasting groups for existing donors, visitors and volunteers to share updates and appeals related to the challenge. They also posted regular updates related to donations and donor numbers on these groups.

4. BPA reached out to corporates and requested them to circulate an email amongst their employees. They used an email template provided by danamojo as part of the danaHELP series.

5. BPA shared feedback reports with the donors, which included impact stories with a photograph. It maintains a donor database of name, amount and cause donated to, for all retail givers for a period of five years, in case donors would like information on their previous donations.

6. BPA invited its retail donors to visit project sites and interact with beneficiaries. They also encouraged donors to participate in the organisation's activities during the matching campaign, and throughout the year as well.

SCOPE FOR IMPROVEMENT:

1. Involving volunteers more strategically throughout the campaign could have helped enhance donor reach and engagement.

2. Increasing offline communication through advertisements at prominent places could have helped maximise donor reach.

“During matching campaigns our focus has been strategic communication to ensure that donors are made aware of the multiplied impact their donations can have. Beyond matching campaigns, we engage with our individual givers through activities and volunteering throughout the year so they stay connected to the cause.”

-Harmish Modi, Fundraising Officer, Blind People’s Association

How to engage post the campaign?

Engaging with donors post the campaign plays an integral role in its success. While the process to initiate, design, and execute matching campaigns

differ based on the matching model, the nature of post campaign engagement is fairly standardised.

COMMUNICATION

1. CONFIRM RECEIPT OF FUNDS: NGOs should share communication with individual donors confirming the receipt of their funds within 1-3 days of receiving donations. In case of online campaigns, platforms may have an option to share automated confirmation to the individual donors.

2. THANK DONORS: NGOs should send thank you notes / emails to their donors within 1-3 days of receiving donations.

3. SHARE TAX EXEMPTION CERTIFICATES AS APPLICABLE: NGOs should share tax exemption certificates with individual donors between 7-30 days of receipt of funds, allowing taxpayers to claim deduction under Section 80-G (as per regulations). In case of matching campaigns on online platforms, the platforms may allow individual donors to download tax exemption certificates immediately after making the donations.

4. COMMUNICATE THE IMPACT: NGOs should share information on the use of funds and impact generated with donors. This could include photo/video documentation, details of beneficiaries, impact of volunteering engagements, etc.

5. ENGAGE CONTINUOUSLY: NGOs should nurture any new donor leads through sustained communication and engagement with donors. This could include periodic newsletters and annual reports, feedback to givers about the impact of their money, names and details of beneficiaries, and invitations to participate in monthly meetings, annual day functions, and interactions with beneficiaries to help donors connect with their work through the year.

REFLECTION

The parameters for measuring the success of the campaign is standard across all models of matching. It is advisable for NGOs to identify these success factors while determining the goals of the matching campaign. Sattva suggests the following parameters that NGOs can track to measure the success of the campaign:

✓ TOTAL FUNDS RAISED	✓ TOTAL NUMBER OF DONORS* ENGAGED	✓ NUMBER OF RECURRING/ OLD DONORS*	✓ NUMBER OF UNIQUE DONORS* ENGAGED
✓ NUMBER OF NEW DONORS* ENGAGED	✓ AVERAGE TICKET SIZE OF DONATIONS	✓ SOCIAL MEDIA OUTREACH (Number of likes, shares, post views)	✓ COMMUNICATION STRATEGY (Collaterals, frequency, days, etc.)

*Across retail donors/ employees

What are the key takeaways?

1. MATCHING IS FOR EVERYONE: All NGOs irrespective of size, age, or prior experience with retail fundraising can capitalise on the immense potential of matching campaigns.

2. DONOR EDUCATION IS KEY: Given the lack of awareness and understanding around matching contributions as a concept, NGOs need to play a greater role in educating their donor networks about the impact of matching contributions, and ensuring they understand its multiplier effect in order to convert them to active donors.

3. IT'S ALL ABOUT THE COMMUNICATION: Communication emerged as a crucial element that is not optimally utilised. In the case of matching campaigns in particular, three elements of communication need to be kept in mind:

- **Impact of matching:** The multiplier effect of matching needs to be communicated in a simple and clear manner.
- **Timing:** Potential donors need to be contacted at the right time such as just before a match is introduced in a campaign and before it is concluding, in order to introduce a sense of urgency.
- **Frequency:** Donors need to be intimated at important junctures, such as once their donation has been matched, and when the campaign has been successful.

4. AVAIL PLATFORM SUPPORT: NGOs with little experience in online fundraising can leverage the support provided by platforms at different stages of the campaign. Platforms such as GiveIndia provide templates for outreach and communication, while Ketto's data analytics has made NGOs such as Vidyadhan Sahayyak Mandal more conscious of tracking similar metrics.

5. LEVERAGE INTERNAL FUNDRAISING CHAMPIONS: NGOs need to mobilise the first champion of fundraising from within their organisation. NGOs can consider involving other team members in the fundraising process for the duration of the campaign. This can also help increase their reach and enable them to attract more individual donors.

“From the organisations’ perspective, it is important to go out and present the ask for matching campaigns. People don’t do that, and that hesitancy is the primary challenge.”

- Anoj Viswanathan, Co-founder, Milaap

About A.T.E. Chandra Foundation

A.T.E. Chandra Foundation (ATECF) anchors the philanthropic giving of Chandra Family. Strategic “portfolio approach” to social investments has helped advance and maximise its impact through various interventions. The Foundation works in collaboration with many leading Indian and Global organisations in the social sector such as Centre for Social Impact & Philanthropy (CSIP), The Bridgespan Group (TBG), and Bill & Melinda Gates Foundation (BMGF).

With a deep data-driven approach, the Foundation aims to create templates for solving various societal problems. It works with a deep sense of purpose around the problems it seeks to solve and aims to play a catalytic role by leveraging the available resources in the ecosystem.



CHANDRA
FOUNDATION

📍 3rd floor, No. 43, Dr. V.B. Gandhi Marg, Kala Ghoda, Fort, Mumbai - 400 023

✉ ate_fort@ateindia.com

☎ 022 4017 2100

in [ate-chandra-foundation](#)

About Sattva

Sattva is a social impact strategy consulting and implementation firm. Sattva works closely at the intersection of business and impact, with multiple stakeholders including non-profits, social enterprises, corporations and the social investing ecosystem.

Sattva works on the ground in India, Africa and South Asia and engages with leading organisations across the globe through services in strategic advisory, realising operational outcomes, CSR, knowledge, assessments, and co-creation of sustainable models. Sattva works to realise inclusive development goals across themes in emerging markets including education, skill development and livelihoods, healthcare and sanitation, digital and financial inclusion, energy access and environment, among others. Sattva has offices in Bangalore, Mumbai and Delhi.



🌐 www.sattva.co.in

✉ impact@sattva.co.in

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