

The Summer Fundraising Playbook

Maintaining Momentum and Unlocking
the Power of Matching Gifts



Double *the* Donation





Housekeeping

- ? **Questions** → Drop them in the **Q&A box** at any time.
- 💬 **Chat** → Watch for **helpful links**, **quick polls** and **casual conversation**.
- 🎉 **Reactions** → Show us how you feel. We love seeing your engagement!
- 📊 **Polls** → We'll launch a few during the session — jump in when they appear.
- 🔄 **Replay** → You'll get the **recording** after the webinar.

Presenters



HOST

Amy Truong

Lead, Member Growth
she/her

Give Lively



GUEST SPEAKER

Ann Rossell Tuyogon

Partnerships Success Specialist
she/her

Double the Donation

Today's agenda



Double *the* Donation



**Navigating the
mid-year slump**



**The matching
gift multiplier**



**Your tactical
summer playbook**



Mid-year fundraising

Why the summer dip?



Donors are distracted: Supporters are out of their routines and away from desks.



Internal slowdown: Nonprofit teams are taking well-deserved vacations.



Low natural urgency: No tax deadlines or holiday spirit to drive "immediate" action.

Auditing your approach

STOP: High pressure

Avoid the following

- High-pressure asks
- Chasing one-time gifts
- Ghosting donors during the slump

START: Stewardship

Lean into relationship building

- Educational stewardship and impact updates
- Emphasizing recurring monthly gifts
- Identifying new revenue opportunities

Mid-year check-in

Start with data analysis

Extract donor records. Pull Q1 and Q2 donor lists, as well as your reports.

Analyze them using the following prompts:

- Are people giving more or less? By how much? Why?
- Has the number of donors increased or decreased?

Note other trends and analysis. For example:

- Have demographics changed or shifted this year? Has the amount per donation changed?
- If not doing segmentation, start with some easy segments and a smaller list: first-time donors, recurring donors, increased their giving, lapsed/LYBUNT.



Summer stewardship series

Touchpoints + in-person event

Send regular touchpoints and updates via email.

- Experiment (do A/B testing) with open rates on subject lines, messaging, clicks.

Plan a casual in-person stewardship event.

- Contact key Q1 and Q2 donors by phone or personal email to check in and extend the invite (including your recurring donors).
- Send formal invitations out via email, collect RSVPs and follow up!
- Keep it simple: drinks and appetizers.



Summer stewardship

At the event - mid-year update

Create a short presentation (lots of pictures).

Do not shy from sharing administration realities and costs.

Present noticeable trends in programs and/or fundraising. For example:

- “There’s been a 15% increase in children needing school supplies this year due to massive layoffs in the community.”
- “Our donor data analysis so far has shown or said the following: [details].”



Summer stewardship

At the event - mid-year update

Share a mid-year impact report with program status, results, impact for Q1 and Q2.

- Include photos/videos, numbers, real stories.
- Encourage program staff to speak.
- Be transparent about use of funds in Q1 and Q2 (super important).



Summer stewardship

At the event - share Q3 and Q4 plans

Share program objectives and fundraising plans to meet these Q3 and Q4 goals.

Keep supporters updated to stay top of mind and prepare them for the official “ask” later.

Example:

- “If you can contribute early and help us reach Q3 and Q4 goals, fantastic!”
- “If you are unable to donate today, keep an eye out for us later in the year.”



Summer stewardship

At the event - share Q3 and Q4 plans

Connect contributions to specific goals. This is a way to bring in additional features like Double the Donation to further impact at no extra cost.

Example: "Any support today will go even further due to [a new feature that we're launching or employer matching]!"

Note: Aim at recurring donors because they're already giving and you're not asking for more. This is a way to further deepen donor impact.



The matching gift multiplier

Diversity through workplace giving



Payroll giving

Predictable, recurring revenue streams directly from employee paychecks before they are issued



Volunteer grants

"Dollars for Doers" programs that pay out cash grants for logged employee service hours



Matching gifts

Corporate doubling of employee donations, typically at a 1:1 or 2:1 ratio for eligible nonprofits

The power of the match



Low-friction ask: Ask for more without donors reaching deeper into their own pockets.



Increased engagement: 71% more donors respond to fundraising appeals mentioning matching.



Larger donations: Average donation amount increases by 51% if a match is offered.



The massive revenue gap

\$7 Billion

unclaimed matching funds every year!

Over 26 million individuals work for matching-gift-eligible companies,
yet **78% are unaware** that their company offers such a program.

A nonprofit's summer matching playbook

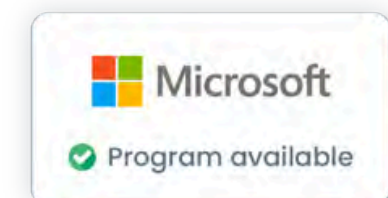
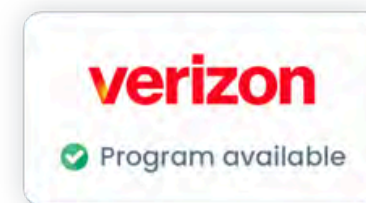
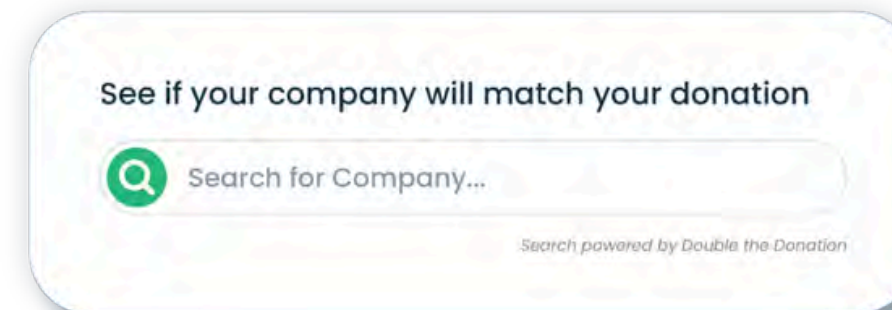
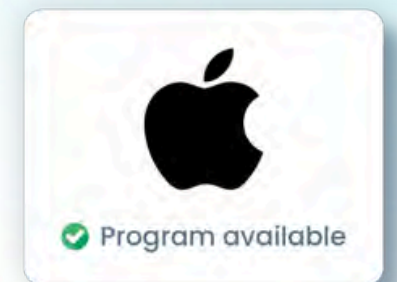
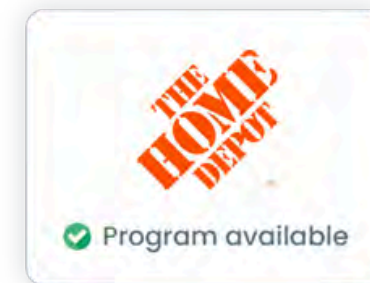
Retroactive audits

- **Mine your past data:** Run a report on all Q1 and Q2 donors to identify individuals who work for match-eligible employers.
- **Leverage extended corporate windows:** Most companies allow employees to submit matching gift requests for 6 to 12 months after the initial donation is made.
- **The cost-free appeal:** Reach out to previous match-eligible supporters to double their past impact without touching their vacation budgets.



Educate your supporters

- Include matching gifts in your **"Ways to Give"** menu.
- Create a dedicated **matching gift landing page**.
- **Explain to donors** what matching gifts are.
- **Direct donors** to specific next steps for submission.
- **Allow donors to search** for their company programs.



Leverage automation tools

- Identify **opportunities within donation forms**.
- Provide donors **company-specific next steps** right after point of giving.
- Automate **post-donation outreach**:
 - Follow up on eligible donors to submit their request.
 - Follow up on donors with unknown employer for potential eligibility.
- Monitor reports for **potential corporate partnerships**.



Proud partners: Double the Donation and Give Lively

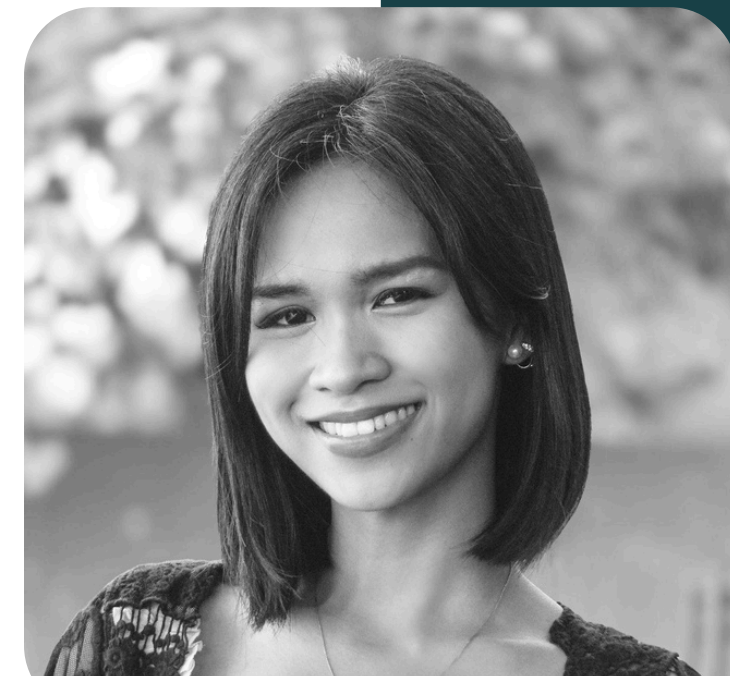


 give lively

The Give Lively logo consists of a small icon of three vertical bars of increasing height, followed by the text "give lively" in a teal, sans-serif font.



Keep in touch!
Connect with me on
LinkedIn



Ann Rossell Tuyogon

Partnerships Success Specialist at
Double the Donation





Enrich your corporate partnerships.

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Community Relations
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Rachel Buffa
America's
Grow-a-Row
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Q&A



Questions → Drop them in the Q&A box.
We'll answer as many as we can.

In closing

Thank you for joining us! ✨

Attend a live or on-demand platform demo

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