START HERE · THE WHOLE PROPOSAL

The Charity Navigator × MatchNice Partnership, 2027. One main proposal, three ways to grow.

Social matching on every Charity Navigator list and fund by June 1, 2027, the October results behind it, and what comes next. Two minutes for this page; about 49 for everything.

Interactive in the app. Pick how much time you have, or your role, and the Guide highlights what to read first. Interact on mobile or desktop.

Executive summary

PROPOSAL 1 The main proposal

- **Social matching on every Charity Navigator list and fund, live by June 1, 2027.** $45,000, funded by a generous funder's grant. Scope in section 3, the ask in section 4.
- **Why matching works:** October's match on your giving page lifted revenue 13% with 19% less traffic. Section 2 has the full story.

PROPOSALS 2 TO 4 Partnership growth

- **Proposal 2 · The Nonprofit Lab, Season 2:** Charity Navigator becomes the partner of Season 2. Your 4-star charities bring their biggest challenge on air and work it through live with a leader who has solved it before, then come back 30 days later to share what changed. Every episode shows what four stars looks like (section 6).
- **Proposals 3 and 4 are ideas to talk through:** impact profiles (with the math and worked examples) and Charity Navigator's Four-Star badge on MatchNice banners (sections 7 and 8).

- **On top of the build:** ten MatchNice features live today, and the roadmap they lead to (section 9).

How to use this app

1. **Move between sections** with the **Guide**: the outline on the left, or the Guide button at the top on a phone. It shows where you are and how far you've read. The white arrows between sections and a swipe left or right on a phone work too.

2. **Most sections open with "In 30 seconds"** and a list of what's on them. Tap a line to jump there.

READING TIME	
★ Start here	**2 min**
PROPOSAL 1 · THE MAIN PROPOSAL	
1 · How Charity Navigator rates	**3 min**
2 · Our first match	**3 min**
3 · Proposal 1 · Social Matching Scope	**4 min**
4 · The ask	**3 min**
THE WHOLE PARTNERSHIP	
5 · Overview	**6 min**
PARTNERSHIP GROWTH · PROPOSALS 2 TO 4	
6 · Proposal 2 · Guides & Changemakers	**6 min**
7 · Proposal 3 · Impact profiles	**12 min**
8 · Proposal 4 · Four-Star badge on banners	**4 min**
PRODUCT	
9 · Released and roadmap	**6 min**
All sections	**About 49 min**

Times assume about 230 words a minute, rounded up, with a little extra for the mockups you can try.

A MESSAGE FROM OUR CEO



We started MatchNice because generosity is contagious, and a match is the simplest way to prove it. When someone says "I'll match your gift," a donor who was only thinking about giving gives today, and often gives more. Every match is a small act of trust between a sponsor, a donor and a charity.

That is why partnering with Charity Navigator means so much to our team. For more than two decades, you have taught donors who to trust. We give them a reason to act on that trust today. October showed what the two do together: our first match on your giving page lifted revenue 13%.

This proposal is our commitment to a long-term partnership: matching on every list and fund, sponsors who come back year after year, and a steady stream of 4-star charities raising more and doing more good. We are proud to build it with you, and we intend to earn your trust for many years to come.

Pooya Pourak Co-founder & CEO, MatchNice

Charity Navigator rates charities to help donors and to celebrate their work. Every proposal here serves one or both.

A one-page refresher on the Encompass Rating System™, in Charity Navigator's own words, and where each proposal in this app fits.

IN 30 SECONDS

- **The goal:** more charities registered, opted in and at four stars. Only 4-star charities get matches, so matching is the reason to climb.
- **Two goals drive the ratings:** helping donors and celebrating the work of charities.
- **Zero to four stars** from a weighted score of 0 to 100. Four stars means 90 or more.
- **Four beacons, 10 evaluation areas.** A complete rating needs data the charity submits through the Nonprofit Portal. The beacons, metric by metric, are in Proposal 3.
- **Each proposal** sends more donors to rated charities, rewards 4-star charities, or helps charities complete their portal data.

THE GOAL: MORE CHARITIES REGISTERED, OPTED IN AND AT FOUR STARS

Everything in this app serves one goal for Charity Navigator: more charities in the Nonprofit Portal, more of them saying yes, and more of them reaching four stars. Matching is the reason to climb.

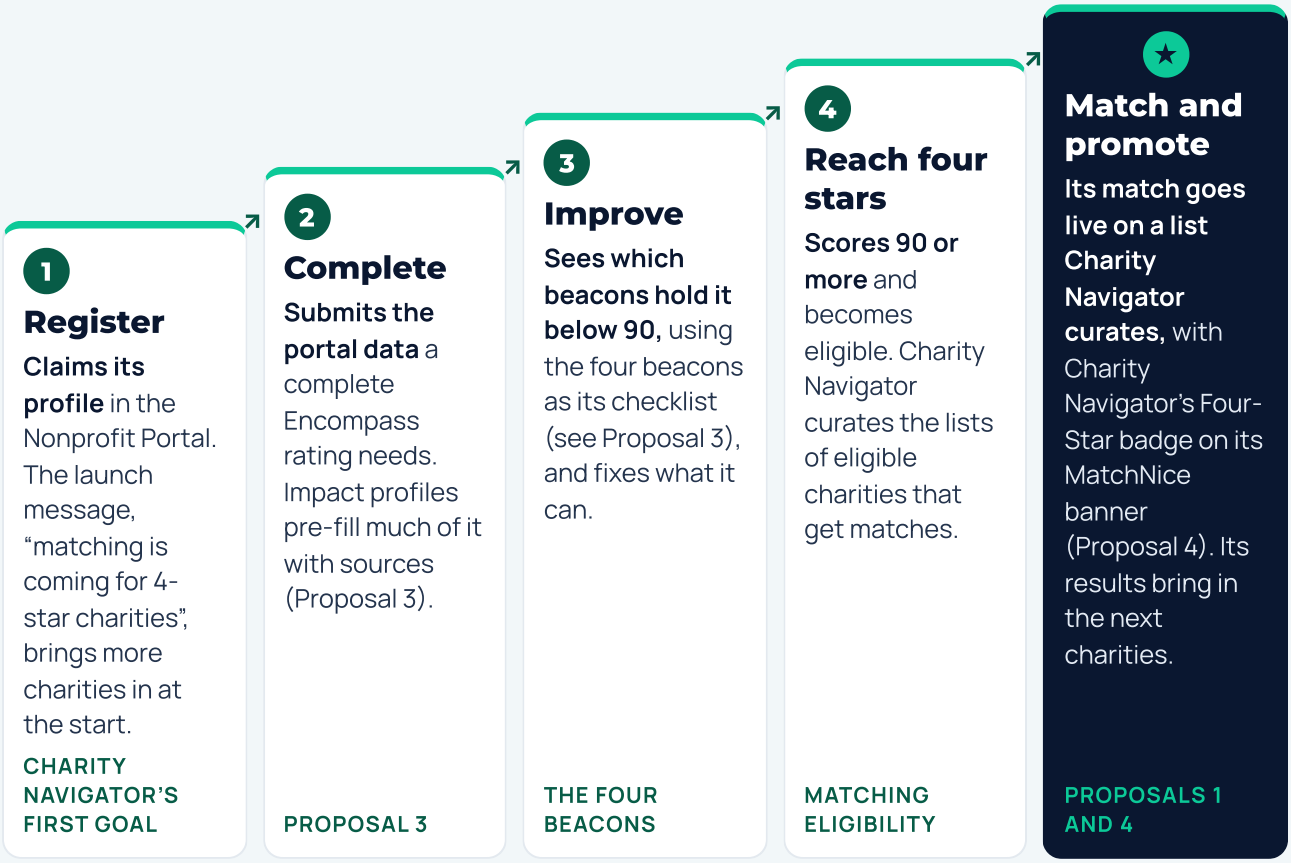
1 Register more
More charities claim their profile in the Nonprofit Portal.

2 More opt-ins
More charities say yes: to completing their data, to matching and to Charity Navigator's programs.

3 More 4-star charities
More charities reach a score of 90 or more, the rating that unlocks a match.

Only 4-star charities will be eligible for matches through Charity Navigator. That gives the fourth star a new, concrete value: match dollars. Matching becomes the reason a charity registers, completes its profile and works its way up, and the launch is the moment to ask.

The matching ladder: how a charity moves up



WHAT WE'D TRACK, YEAR OVER YEAR

- **Registered** charities in the portal
- **Complete** Encompass ratings
- **Charities that moved up** at least one star
- **4-star charities with a live match**
- **Match dollars and gifts** through Charity Navigator

Each one compared with the same count a year earlier. Starting counts come from Charity Navigator's own data at launch; we don't estimate them here.

WHY IT'S GOOD FOR CHARITY NAVIGATOR

- **More impact for nonprofits on the Charity Navigator network:** matched gifts and new donors for the charities you rate.
- **More registered charities** means more complete data, which is the mission.
- **More 4-star charities** gives donors more charities they can trust.
- **More giving through your lists and funds,** and tip revenue with it: about +$37,250 net cash in 2027 at $1M matched (section 3).
- **A funding story that renews itself:** every match is the proof for the next sponsor grant, with a goal of about $50,000 a year from 2028.

How the launch drives it: announce that matching is for 4-star charities, run a registration drive, help charities complete and improve their ratings, and have matches live on every list and fund by June 1, 2027.

How the stars work

Eligible charities get a zero- to four-star rating, from the weighted sum of their metrics (0 to 100).

Charity Navigator STAR RATINGS

★★★★	★★★	★★	★	0
90+	**75–89**	**60–74**	**50–59**	**under 50**
Great	Good	Needs improvement	Poor	Very poor

Who is rated: 501©(3) public charities with three years of Form 990 filings, which Charity Navigator receives from the IRS. 990-EZ, 990-N and 990-PF filings don't qualify, and private foundations aren't rated. A **complete** Encompass rating also needs data the charity submits through the Charity Navigator Nonprofit Portal.

TWO GOALS, FOUR PROPOSALS

> **"Two objectives drive our approach to rating charities: helping donors and celebrating the work of charities."**
>
> Charity Navigator, How We Rate Charities

GOAL 1

Helping donors

Social Matching Scope Matching on every Charity Navigator list and fund gives donors a reason to give today, where they already check ratings.

Impact profiles Donors see what a gift does, with a source on every number.

Four-Star badge Donors see the rating on the banner where they give, and check it in one tap.

GOAL 2

Celebrating the work of charities

Guides & Changemakers Only 4-star charities get sessions, so every episode showcases good practice.

Four-Star badge on banners Every 4-star charity can show its rating right where donors give.

Impact profiles Helps charities complete the portal data a full rating needs, with no Charity Navigator staff time.

APPROVED BY CHARITY NAVIGATOR · ALL FIGURES VERIFIED

Revenue up 13% with 19% less traffic. Charity Navigator's first match, in detail.

In October 2026, Charity Navigator ran its first match with MatchNice on its GoFundMe Pro giving page. Only the match was new. Here is what we ran, how we measured it, and what changed.

IN 30 SECONDS

- **Revenue rose 13%,** from $11,798 to $13,366, while return visitors fell 19%.
- **Every visit was worth more:** $1.14 per visitor, up from $0.82.
- **More new donors:** 56% of gifts came from first-time donors, up from 43%.
- **One change, clean result:** the same four days and pop-up as 2025, no email or text push.

THE RESULTS

+13%
Total revenue
$11,798 → $13,366

+40%
Revenue per visitor
$0.82 → $1.14

+6%
Conversion rate
more visitors gave

$62
Average gift
up from $47

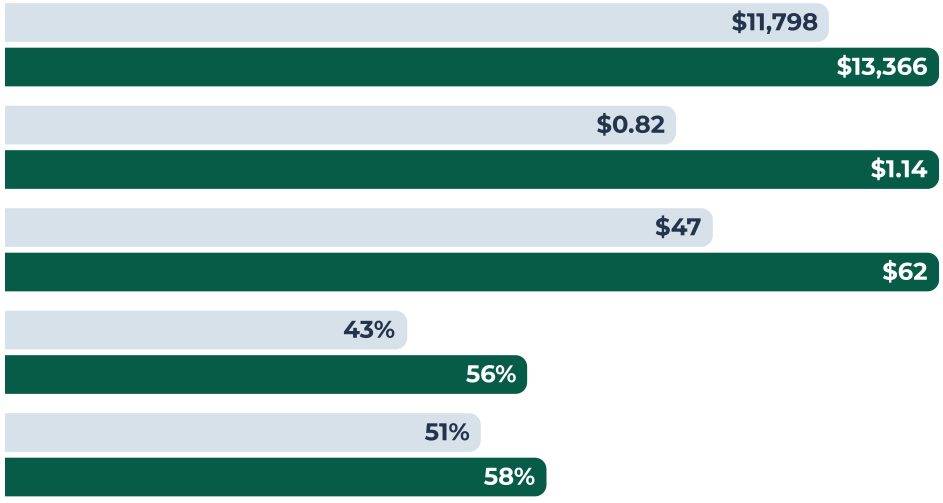
56%
Gifts from first-time donors
up from 43%

58%
Gifts that covered fees
up from 51%

–19%
Return visitors
as AI search cut traffic

BEFORE AND AFTER

The same four days in 2025, with no match, against 2026 with the match.



2025, no match 2026, with the match

HOW WE RAN IT

WHERE
Charity Navigator's own giving page
Hosted by GoFundMe Pro.

WHAT WAS NEW
Only the match
MatchNice's match banner on the homepage, plus the website pop-up Charity Navigator already ran.

THE MATCH
Funded by board members
Shown in the giving form and at checkout through GoFundMe Pro's new sponsor matching.

MEASURED
Same four days, a year apart
No email or text push in either year.

SEP 24, 2026
Go-live date set
Kyle confirms Charity Navigator can push the match live on October 13.

OCT 14, 2026
The match goes live
MatchNice's banner runs on the homepage and the giving page. The first of three pilot matches planned with Charity Navigator.

OCT 14–16, 2026
GoFundMe Pro sponsor matching switched on
GoFundMe Pro had just launched it. The match now shows in the giving form and at checkout too, the first MatchNice campaign to use it.

FOUR FULL DAYS
Thursday to Sunday, measured
Compared with the same days in 2025, when no other campaigns ran.

OCT 21, 2026
Results review with Kyle
Revenue up 13% with 19% fewer return visitors. Next idea: an A/B test of the form with and without the banner.

NOV 2026
Case study approved
Developed by MatchNice and approved by Charity Navigator, with all figures verified.



"Even with far fewer return site users, we saw a big increase in dollars... All in all, I consider it a rousing success. It's helping us do more with less."

Kyle Gardner SVP of Development, Charity Navigator

WHAT IT MEANS FOR 2027

One page, four days and one change lifted revenue 13%. Social matching brings the same match to every Charity Navigator list and fund by June 1, 2027.

See Social Matching Scope → · Open the one-page case study

Sources: the Charity Navigator × MatchNice case study (approved by Charity Navigator), launch emails of Sep 24 and Oct 14–16, 2026, and the Oct 21 results call.

Draft · November 14, 2026

MAIN PROPOSAL · ON TRACK

Matching on every list and fund by June 1, 2027. Here's the decision and where it stands.

The $45,000 matching contract for 2027, the October 2026 evidence on Charity Navigator's dedicated giving page, what $1M in matching would mean, and the milestones the team updates.

IN 30 SECONDS

- **$45,000 for 2027**, funded by a generous funder's grant, with the goal to win another grant.
- **October's match** on your dedicated giving page lifted total revenue 13%; first-time donors rose to 56% of gifts.
- **At $1M matched:** about $130,000 extra giving, about 1,160 new donors, +$37,250 net cash to Charity Navigator.
- **Live on every list and fund** by June 1, 2027, then a sponsor dashboard aims to bring in about $50,000 a year in new grants.

SOCIAL DONATION MATCHING, 2027

THE DECISION

$45,000 for 2027, funded by a generous funder's grant (the Matching Sponsor). Matching goes live on curated lists, Causeway Funds and Give Now lists, through the Giving Basket, by June 1, 2027. The 2028 price is set together at the 90-day review, based on 2027 results, and isn't owed until the platform is live.

WHAT THE $45,000 BUYS

- **$32,000** scope and build, paid at the four gates
- **About 300 MatchNice hours** at $150. A flat fee, with no percentage of any dollar.
- **Partner bonus:** October and December 2026 match fees waived ($1,000 each, $2,000 in all)
- **$13,000** launch and platform: hosting at 99.9%, 60 support hours
- **Partner bonus:** transactional email build and Q3–Q4 upkeep ($9,000), at no charge

☆ **Early access to everything MatchNice launches.** Charity Navigator gets each new feature as it ships, on top of the custom build. The full catalog is below.

Early access to the whole MatchNice catalog

Charity Navigator's matching runs on the MatchNice platform, so everything below comes to your lists and funds as it ships. Status as of November 16, 2026. AI marks the features where AI drafts the messages or explains the results.

ALREADY IN PLACE — What Charity Navigator already uses

One-time match campaigns — IN PLACE
Every gift in a window matched, 2X or more. The match behind October.

Monthly giving match — IN PLACE
New monthly donors' gifts matched to grow recurring giving.

Match banner and pop-up — IN PLACE
Live progress and countdown on the giving page.

Match results reporting — IN PLACE
Before-and-after results for each match, as in your case study.

RELEASED — Live now, seven of them shipped this November

Matcher recognition — NOV 9
"Proud Matcher" or "Proud Sponsor" on every banner.

Responsive match banners — NOV 11
Every number on the banner, on every screen.

Sponsor Finder AI — NOV 15
Find the next matcher in a nonprofit's own giving history.

Sponsor Pipeline — NOV 15
Five stages from prioritized to confirmed, with stewardship steps.

Campaign Outreach AI — NOV 15
The right ask to the right people, ready to copy.

Donor Unlock Banner — NOV 15
New monthly donors unlock the match, together.

Campaign Pages — NOV 16
A match page a nonprofit edits by clicking on the page, with share links, giving chains and the Ripple Map.

Outreach Co-Pilot AI — LIVE
Sponsor asks and donor messages for each donor group, drafted for review.

Peer-to-peer matching — LIVE
A match behind every supporter's fundraising page.

IN THE PIPELINE — Coming soon, in an order we set with you

Impact cards — COMING SOON
Show donors what their gift does, once the nonprofit approves.

Sponsor pages — COMING SOON
A page of its own for every match sponsor.

Sponsor Portal — COMING SOON
A private home for every sponsor, with live reporting.

Sponsor personas — COMING SOON
Know which sponsor to ask, and when.

COMING SOON

Guided campaign setup

A strong match plan, one question at a time.

COMING SOON

Audiences

Who to invite, built from the giving history.

COMING SOON

Outreach that writes itself AI

Every campaign message, drafted for review.

COMING SOON

Your match year

Every match campaign across the year, at a glance.

COMING SOON

Easy sign-up

From an EIN to a first match in minutes.

COMING SOON

Results that get smarter

Did the match move the goal?

COMING SOON

Real-time gift tracking

The banner keeps up with every gift.

IN YOUR PROPOSAL

Sponsor and donor emails AI

Personalized sequences across the nonprofit, sponsor and donor journeys.

COMING SOON

Giving days

A match that makes a giving day stand out.

IN THE WORKS

Employer matching

Matches from donors' employers, found and claimed.

Details on every release and the roadmap in section 10 →

THE EVIDENCE: ONE OCTOBER 2026 MATCH ON CHARITY NAVIGATOR'S DEDICATED GIVING PAGE, HOSTED BY GOFUNDME PRO

+13%

Total revenue, $11,798 to $13,366

+40%

Revenue per visitor, $0.82 to $1.14

+32%

Average gift, $47 to $62

56%

Gifts from first-time donors, up from 43%

Board match, October 2026, compared with the same four days in 2025. Only the match was new: no email or text push. 58% of gifts also covered fees, up from 51%. Source: **the case study**, approved by Charity Navigator. This is one match over four days, so it's a strong signal, not a guarantee.

WHAT $1M IN MATCHING MEANS, AND THE RETURN ON THE $45,000

AT THIS MUCH MATCHED	2027	2028
Matched dollars	$1,000,000	$2,000,000
Extra giving from donors	**$130,000***	**$260,000***
New donors	**~1,160†**	**~2,320†**
Tip revenue to Charity Navigator	**$28,250‡**	**$56,500‡**
Email build and upkeep Charity Navigator avoids about 60 hours at $150	$9,000	TBD
Net cash to Charity Navigator	**+$37,250**	**+$60,500** before fee

* Modeled on the +13% increase in total revenue from the October 2026 case study match ($11,798 to $13,366), applied to the matched dollars: 13% × $1,000,000 = $130,000.
† New donors assume a 10% new-donor lift at a $112 average gift. The lift is MatchNice's estimate, based on the case study, where first-time donors rose from 43% to 56% of gifts. The $112 is Charity Navigator's 2025 Giving Basket average ($51M over 457K gifts). 2028 doubles it with the matched dollars, like the rows above.
‡ Tips are 2.5% of matched dollars plus extra giving: 2.5% × ($1,000,000 + $130,000) = $28,250. The 2.5% tip rate is Charity Navigator's own figure, from Kyle: about $50,000 in tips on $2M (MatchNice proposal, November 9, 2026, appendix A8).
Other lifts in the same match, not modeled here: +39% revenue per visitor ($0.82 to $1.14) and +32% average gift ($47 to $62).

THE RETURN ON $45,000

- **For nonprofits:** about $1.13M more than donors alone would have given: the $1M match plus about $130,000 in extra giving, and roughly 1,160 new donors.
- **For the Matching Sponsor:** each $1 of the $45,000 build unlocks about $2.90 of extra donor giving in year one ($130,000 ÷ $45,000), and keeps working in 2028 and after.
- **For Charity Navigator:** about +$37,250 in net cash in 2027, with nothing paid.
- **For donors:** every gift goes twice as far with a 1:1 match, on every list and fund, with the sponsor named and the progress live.
- **For MatchNice:** a flagship partner and the 2027 results story that brings more sponsors and nonprofits to matching. We earn a flat fee, never a percentage of any gift.

Source: MatchNice executive brief sent to Kyle on November 9, 2026. The table assumes a 1:1 match that is fully used and October's +13% revenue lift. Matched dollars are planning targets set with Kyle. The $2.90 per dollar and the $1.13M are simple arithmetic on those same figures.

FUNDING IT FOR YEARS TO COME: THE SPONSOR DASHBOARD PLAN

The goal is about **$50,000 a year in new matching grants from 2028 on**, so matching keeps running year after year. MatchNice is building a sponsor reporting dashboard that turns every match into the proof for the next grant.

Show
A live view for the donor and Charity Navigator: dollars matched, new donors, and the lift on each list and fund.

Report
The September 30, 2027 sponsor report comes straight from the dashboard, with no extra work for Charity Navigator.

Renew and grow
The same proof goes to this donor for a renewal grant and to new matching sponsors, such as foundations and corporate giving teams.

A plan, not a pledge: the $50,000 a year is a target. The dashboard is in development at MatchNice.

MATCHING MILESTONES

Status shown as of the draft. Sign in to see live team updates.

Nov 9, 2026	**Proposal and executive brief sent to Kyle** $45K for 2027, funded by the Matching Sponsor's grant	DONE
Dec 1, 2026	**Agreement signed** Statement of work, agreement and pricing	NOT STARTED
TBD	**December test match** Pending Charity Navigator's direction	NOT STARTED
Jan 4, 2027	**Discover starts** Donor, staff and sponsor interviews	NOT STARTED
Jan 15, 2027	**Charity Navigator stakeholders named for every role on the stakeholder map (section 5); Give Lively real-time yes or no** Fallback: a scheduled file of gifts	NOT STARTED
Jan 29, 2027	**Gate 1: research findings accepted**	NOT STARTED
Feb 26, 2027	**Gate 2: scope and design signed off** Integration option, pilot lists, match defaults	NOT STARTED
Apr 2027	**Pilot on one list with a live matcher**	NOT STARTED
Apr 30, 2027	**Gate 3: Charity Navigator accepts the build**	NOT STARTED
May 24, 2027	**Go or no-go**	NOT STARTED
Jun 1, 2027	**Live on every list and fund**	NOT STARTED
Sep 30, 2027	**Sponsor report** Targets: $250,000 matched, 500+ new donors	NOT STARTED

Sources: plan doc (Nov 4), executive overview deck, executive brief and email to Kyle (Nov 9), October 2026 case study.

Draft · November 14, 2026

Thank you for our first match: revenue up 13% and 56% of gifts from first-time donors, with 19% fewer return visitors. Read the case study

THE NONPROFIT LAB · GUIDES & CHANGEMAKERS PILOT

Send one survey to your nonprofits. We'll do the rest.

Nonprofits tell us their biggest challenge. We pair **up to three with an expert for a free 30-minute working session** on The Nonprofit Lab podcast and share what changed 30 days later. Charity Navigator gets the credit.

WHAT CHARITY NAVIGATOR DOES

1. **Send the survey**
   Two questions, below. We draft it; you approve and send.
2. **Share the answers**
   Answers, plus contacts only for those who said yes.
3. **Co-sign two follow-ups**
   How it works, then a match note.
4. **Be TNL's Season 2 partner**
   For all of 2027, with credit across the season.
5. **Amplify more 4-star charities across the sector**
   Real fixes on air, proven 30 days later. Let's go.

WHAT MATCHNICE DOES

- **Sort every answer** into themes
- **Recruit and vet** expert Guides
- **Pair nonprofits** who said yes
- **Host, record and edit** sessions
- **Publish an online resource** of three things to try
- **Follow up at 30 days** and publish the case study
- **Co-author it**, with backlinks to each

THE SURVEY, READY TO SEND

Under 2 minutes · Goal: 400+ answers (±5 pts at 95% confidence) from [list size] sent

THE EMAIL · FROM CHARITY NAVIGATOR

Subject: Your biggest challenge, in two questions

As a 4-star charity, you're invited to a 2-minute survey with The Nonprofit Lab podcast, which pairs nonprofits with experts for free sessions. Take the survey

SURVEY INTRO · ABOVE QUESTION 1

Charity Navigator is the Season 2 partner of The Nonprofit Lab, MatchNice's podcast, which just released its 100th episode. Each episode pairs a nonprofit leader with an expert on one real challenge and ends with three things to try in 30 days.

QUESTION 1 · OPEN ANSWER

What is the biggest challenge your organization is facing right now? Tell us what's happening and what you've tried.

Type your answer

Everyone who answers gets first access to [report name].

QUESTION 2 · YES OR NOT NOW

As a 4-star charity, you're eligible for a free 30-minute expert session. Want to learn more?

Yes, I'm curious | Not now

Yes just puts you in the running. Recorded for the podcast, up to three per session. Never sold. Nothing public without approval.

Thank-you screen: "Thank you! Your answer helps shape Season 2 of The Nonprofit Lab. If you said yes, we'll be in touch."

BEHIND THE SURVEY: TWO DATABASES

The Changemaker database

Fully managed by Charity Navigator

A secure, private, encrypted database of opted-in nonprofits' challenges. MatchNice never solicits them unless asked.

The Guides database Fully managed by MatchNice

First Guides come from our impact network (3 of 3 said yes); others apply and disclose what they sell.

MatchNice governance: all opt-in, no PII, never sold. All comms to nonprofits come from Charity Navigator.

SPONSORSHIP OPPORTUNITIES

Each pairing can carry one sponsor, who gets:

- Logo on the episode art
- YouTube + podcast webinar
- 30-day results write-up
- Warm intro, if both opt in
- Co-branded online resource
- Published case study
- Social post templates
- Permanent show + MatchNice logo

POTENTIAL SPONSOR REVENUE

Pilots free. 2028: **25** episodes × $**1000** = **$25,000**

RELEASED

Donor Unlock, for monthly giving

Every few new monthly donors unlock part of the match: “3 more donors unlock $600.” A “Remind me” button before launch, and unlocked dollars never go back.

For Charity Navigator: a match that grows recurring donors, not only one-time gifts.

RELEASED

Every-screen banner layout

On small screens, the match amount stays put and the rest (progress, time left, matcher) rotates in slides, with a swipe guard so a swipe never opens the donation page by mistake.

For Charity Navigator: the full match story on every phone.

Apply free through The Nonprofit Lab. Pay only if selected.

WHAT CHARITY NAVIGATOR GETS

- **Free expert help** and **anonymized themes**
- **A 4-star showcase:** only 4-star charities are eligible, with special plugs on the show. Promote episodes to your network.
- **Impact data** that can feed the impact beacon of the rating
- **Lead sponsor credit** on our website, the podcast’s marketing channels and every episode, webinar, resource and case study

PROPOSED 2027 TIMELINE

January
Charity Navigator sends the survey

February
Themes to you. 25 problem frames paired with Guides and Changemakers.

By March
Up to three sessions recorded

April–June
Episodes, case studies, 30-day results

July–September
Second wave of pairings

October–December
Year-end theme report. Season 2 wrap.

The Nonprofit Lab by MatchNice · Pooya Pourak, CEO of MatchNice, PBC and host of the show

Draft · November 14, 2026

OVERVIEW · THE WHOLE PARTNERSHIP

One partnership, four lanes. Here's the plan, who it takes and where it stands.

Matching on every Charity Navigator list and fund by June 1, 2027. A podcast pilot that turns your nonprofits' challenges into expert help. And an impact-profile idea for later. Status on this page is shared: anyone on the team can update a milestone.

TWO DECISIONS FOR 2027: THE MAIN PROPOSAL AND ONE GROWTH PROPOSAL

PROPOSAL 1 · MAIN PROPOSAL · SOCIAL MATCHING SCOPE

$45,000, funded by a generous funder's grant. Matching live on every list and fund by June 1, 2027. Projected +$37,250 net cash to Charity Navigator in 2027.

See section 3 →

PARTNERSHIP GROWTH · PROPOSAL 2 · SEASON 2 PARTNER

$15,000 for 2027, separate from the matching contract. One survey to your 4-star charities; MatchNice runs the rest. Lead sponsor credit on every episode, webinar, resource and case study.

See section 6 →

↔ **How they fit:** matching's projected 2027 net cash to Charity Navigator (+$37,250) is about 2.5 times the $15,000 partnership, and the podcast puts the same 4-star charities and their results on air. Projections use October's +13% lift; see tab 3.

THE MAIN PROPOSAL AND PARTNERSHIP GROWTH

MAIN PROPOSAL · ON TRACK

Proposal 1 · Social Matching Scope

Matching on every Charity Navigator list and fund by June 1, 2027. The $45,000 decision, the evidence and the milestones.

Open tab →

PARTNERSHIP GROWTH · FOR REV

Proposal 2 · Guides & Changemakers

The Nonprofit Lab podcast pilot: one survey, expert sessions, case studies, and the math to reach 25 episodes.

Open tab →

PARTNERSHIP GROWTH · FOR REVIEV

Proposal 3 · Impact profiles

A pre-filled impact profile nonprofits approve once and use everywhere donors give, with momoGood as the first giving platform.

Open tab →

THE PLAN IN FOUR LANES

Every milestone in this app, grouped by who drives it. Status is shared with the milestone lists on each proposal tab: change it in one place and it changes in both.

1 Partnership and governance

The agreement, the people, the four gates and the go or no-go.

Charity Navigator · Kyle Gardner, SVP Development | **MatchNice** · Pooya Pourak, CEO

Nov 9, 2026	**Proposal and executive brief sent to Kyle** $45K for 2027, funded by the Matching Sponsor's grant	DONE
Nov 10, 2026	**Kyle agrees in principle** Charity Navigator runs the survey; MatchNice does the rest	DONE
Dec 1, 2026	**Agreement signed** Statement of work, agreement and pricing	NOT STARTED
Jan 15, 2027	**Charity Navigator stakeholders named for every role on the stakeholder map (section 5); Give Lively real-time yes or no** Fallback: a scheduled file of gifts	NOT STARTED
Jan 29, 2027	**Gate 1: research findings accepted**	NOT STARTED
Feb 26, 2027	**Gate 2: scope and design signed off** Integration option, pilot lists, match defaults	NOT STARTED
Apr 30, 2027	**Gate 3: Charity Navigator accepts the build**	NOT STARTED
May 24, 2027	**Go or no-go**	NOT STARTED

2 Product and integration

From a test match (timing pending Charity Navigator's direction) to matching live on every list and fund.

Charity Navigator · Engineering lead, named by January 15 | **MatchNice** · Ibraheem Saleh, CTO

TBD	**December test match** Pending Charity Navigator's direction	NOT STARTED
Jan 4, 2027	**Discover starts** Donor, staff and sponsor interviews	NOT STARTED
Apr 2027	**Pilot on one list with a live matcher**	NOT STARTED
Jun 1, 2027	**Live on every list and fund**	NOT STARTED

3 Marketing and content NEW

Telling the story: the press release, the registration drive, the podcast season and the launch.

Charity Navigator · Communications lead, to confirm

MatchNice · Marketing lead, with Pooya on the podcast

Dec 2026	**Joint press release: matching for 4-star charities** Proposed. MatchNice drafts it; Charity Navigator's communications team edits, approves and issues it, after the agreement is signed	NOT STARTED
Dec 2026	**One-pager, invite and survey copy approved** Plus list size, send date and the $15,000 Season 2 partnership	NOT STARTED
Jan 2027	**Registration drive: "Matching is coming for 4-star charities"** From Charity Navigator to charities, by email and in the Nonprofit Portal. MatchNice drafts the copy	NOT STARTED
Jan 2027	**Charity Navigator sends the survey**	NOT STARTED
Feb 2027	**Themes to Charity Navigator; 25 problem frames paired** Guides and Changemakers confirmed for 25 episodes (see the funnel below)	NOT STARTED
By Mar 2027	**Up to three sessions recorded** 1 hour each	NOT STARTED
Apr–Jun 2027	**Episodes, case studies and 30-day results out**	NOT STARTED
May 2027	**Launch kit ready** Donor-facing copy for every list and fund, the launch email, social posts and a note for the press	NOT STARTED
Jun 1, 2027	**Launch announcement: matching live on every list and fund**	NOT STARTED
Jul–Sep 2027	**Second wave of pairings** From the same opted-in database	NOT STARTED
Oct 2027	**One-year results story** Built from the September 30 sponsor report, for donors, sponsors and the press	NOT STARTED
Oct–Dec 2027	**Year-end theme report; Season 2 wrap**	NOT STARTED

4 Sponsors and impact

The money behind the matches, and the proof that brings in the next grant.

Charity Navigator · Kyle Gardner and the development team | **MatchNice** · Dickson Nuesse, partnerships

Nov 2026	**MatchNice asks momoGood how its donor and corporate CSR wrap-up reports work** Decides where the impact card shows and how sponsors see it	NOT STARTED
After the 2027 agreement	**Talk with Charity Navigator about a profile-data partnership**	NOT STARTED
TBD	**Pre-fill test on 20 to 30 nonprofits from public 990s** How often a usable count is found	NOT STARTED
TBD	**momoGood pilot with about 25 nonprofits** Gate: approval rate and time	NOT STARTED
Sep 30, 2027	**Sponsor report** Targets: $250,000 matched, 500+ new donors	NOT STARTED
From 2028	**About $50,000 a year in new matching grants** A target, not a pledge. The sponsor dashboard turns every match into proof for the next grant	NOT STARTED

The press release, registration drive, launch kit and results story are proposals. Charity Navigator's communications team approves anything issued in its name.

WHO IT TAKES: THE STAKEHOLDER MAP

Matching on every list and fund reaches well beyond one team. Here is everyone the plan needs, from the inside out. The dot shows the lane each one mainly works in. Roles marked "Name to confirm" are our suggestion; Charity Navigator decides who fills them.

The four lanes, defined. Every role below belongs to one.

1 · Partnership and governance
The agreement, the four gates, the money and the go or no-go decisions.

2 · Product and integration
Building matching into the Giving Basket, lists and funds, and keeping it running.

3 · Marketing and content
The press release, the registration drive, the launch and the results story.

4 · Sponsors and impact
Finding and keeping matchers, impact profiles and the results each sponsor sees.

Charity Navigator × MatchNice one partnership, four lanes

INSIDE CHARITY NAVIGATOR

Charity Navigator CEO
Executive sponsor
Champions the partnership, gives the press release its voice and joins the go or no-go.

Kyle Gardner
SVP Development · partnership lead
Owns the agreement, the four gates and the sponsor relationships. Also picks the pilot list, the match defaults and the copy donors see on Curated lists and Causeway Funds, and shares the baselines and confirms results for the case studies and the sponsor report.

Board members
Funded the October match
First champions, and natural first matchers for 2027.

Project owner
Named by January 15
Runs the weekly working session and keeps the milestones moving.
NAME TO CONFIRM

Engineering lead
Named by January 15
Connects the Giving Basket, lists and funds, and settles the real-time feed.
NAME TO CONFIRM

Communications and marketing
Press, email and social
Approves and issues the press release, the registration drive and the launch.
NAME TO CONFIRM

Nonprofit outreach
Nonprofit Portal
Sends the registration drive and the podcast survey, and helps charities complete their profiles.
NAME TO CONFIRM

Donor support
Donor questions
Answers donors' questions about matches on lists and funds.
NAME TO CONFIRM

Finance
Grant and payments
Receives the grant, pays at the gates and tracks match funds.
NAME TO CONFIRM

Legal and privacy
Agreement and data terms
Reviews the agreement, the data terms and the sponsor terms.
NAME TO CONFIRM

PARTNERS AROUND THE PLATFORM

Matching Sponsor
A generous funder
Its grant funds the $45,000.

Give Lively
Giving Basket platform
Real-time gift feed, or a scheduled file of gifts (decided by January 15).

2027 matchers and sponsors
Fund the matches
Put up the match on each list and fund, and see results on the sponsor dashboard.

- **The Nonprofit Lab Guides**
  Season 2 experts
  Paired with charities for free working sessions on the podcast.

- **momoGood**
  Exploratory
  Could show impact profiles where employees give (Proposal 3).

WHO IT REACHES

4-star charities	Charities climbing	Donors	Media and the sector
Matched gifts and new donors	A reason to reach four stars	Every gift goes further	The press release, launch and results

MatchNice team: Pooya Pourak, CEO · Ibraheem Saleh, CTO · Dickson Nuesse, partnerships · Marketing lead

LATER: CHARITY NAVIGATOR INSIGHTS — IDEA, NOT AGREED

If the first survey works, the same opt-in panel can become a standing research service. A live tracker shows what Charity Navigator's nonprofits are struggling with, theme by theme. Funders, vendors and researchers pay to put questions to nonprofits that opted in, and the sector gets the results. Charity Navigator owns the relationship, MatchNice runs the research, and the split is set together.

Rough sizing: about 400 answers gives results within ±5 points at 95% confidence, and about 1,070 gives ±3. Needs Charity Navigator's list size and response rate from the first send.

WHO DOES WHAT

AREA	MATCHNICE	CHARITY NAVIGATOR
Executive sponsor, project, research and design	Pooya Pourak, CEO	Kyle Gardner, SVP Development
Product, engineering and reporting	Ibraheem Saleh, CTO	Engineering lead, TBD
Matchers, partnerships and launch	Dickson Nuesse	Project owner, TBD
Marketing, press release and launch	MatchNice marketing lead	Communications lead, TBD
Podcast pilot: survey, themes, outreach, sessions	Pooya Pourak	Survey send and promotion, TBD

Weekly: a 30-minute working session and a short status note. Monthly and at each gate: a 45-minute steering meeting.

Sources: plan doc (Nov 4), executive overview deck, executive brief and email to Kyle (Nov 9), October 2026 case study.

Draft · November 14, 2026

PARTNERSHIP GROWTH · FOR REVIEW

One survey, real challenges, expert help on air. Here's the proposal and the math to 25 episodes.

A first proposal for review: how the podcast pilot works, how each pairing runs, the business model, and what it takes to get from one survey to 25 episodes.

IN 30 SECONDS

- **Charity Navigator sends one two-question survey** to its 4-star charities. MatchNice runs everything after.
- **$15,000 Season 2 partnership** for 2027, with lead sponsor credit on every episode, webinar and case study.
- **Nonprofits never pay.** Guides and sponsors are the buyers, and nothing is ever sold.
- **About 2,084 emails reach 25 episodes** at the placeholder rates in the funnel.

THE NONPROFIT LAB: GUIDES & CHANGEMAKERS, SEASON 2

Charity Navigator sends one survey and becomes the **Season 2 partner** of the show for $15,000 in 2027 (separate from the matching contract). **Only 4-star charities** are eligible for sessions, so every episode showcases good practice and rewards complete profiles, and Charity Navigator can promote each one to its wider network. **MatchNice runs everything after the send.** Here is how the pieces fit.

1
Survey
Charity Navigator sends two questions to its nonprofits.

2
Changemakers
Opted-in answers go into a secure, private database of real challenges, sorted into themes and fully managed by Charity Navigator. MatchNice never reaches out to, solicits or promotes its services to these nonprofits unless asked.

3
Guides
Fully managed by MatchNice. Consultants and solution providers apply with a proposal: the problem, approach, results, what they sell.

4
Session
A 30-minute recorded working session, one-on-one or a group of up to three.

5
30 days
A follow-up on what changed, then the episode and case study go out.

HOW THE BUSINESS MODEL WORKS

Nonprofits get free expert help. Guides and sponsors pay for the reach. Charity Navigator gets the credit on every piece.

WHO PAYS

Guides and sponsors

For a consultant or solution provider,

a pairing is a qualified lead

: a nonprofit that named its problem, a recorded session, and a case study with results. They

apply free and pay only if selected

. Pricing is set after the pilot.

WHO NEVER PAYS

Nonprofits

Changemakers get a

30-minute working session

with an expert, a 30-day follow-up and a published case study,

at no cost

.

WHAT'S NEVER SOLD

Information

We are not a list-selling business

and never will be. Leads and contacts stay out of the public research. Only anonymized themes and approved case studies are published.

SPONSOR REVENUE FORECAST · 2028

The 3 founding pairings are free. Change either number.

25 sponsored episodes × $ 1000 per package = **$25,000** forecast

Series and theme sponsors would come on top. A forecast, not booked revenue. Charity Navigator's $15,000 Season 2 partnership covers 2027.

Interactive in the app. Change the episodes or the price to see the forecast update. Interact on mobile or desktop.

The strategy: every pairing feeds the next

1. **A survey wave** fills both databases: nonprofits with real problems, and Guides who have solved them.
2. **Each pairing** makes a stack of content: the episode, the webinar, clips, a resource and a case study.
3. **Each case study** is co-authored by the nonprofit, the Guide and MatchNice, and published on every partner's site.
4. **Backlinks between them** build search traffic for all three, with Charity Navigator credited on every piece.
5. **That content** brings in the next wave of nonprofits and Guides, and the loop starts again.

WHAT EVERY PAIRING PRODUCES

Full episode
Audio and video, crediting Charity Navigator

Webinar
Session published on YouTube and podcast platforms

Short clips
Made for social

Episode art
With the sponsor's logo

Permanent sponsor logo
On the podcast and on MatchNice

Co-branded online resource
For the blog and knowledge base: three things to try in 30 days

30-day results write-up
What was tried and what changed

Published case study
Co-authored, with backlinks

Social post templates
For the nonprofit, Guide and sponsor

Newsletter feature
The pairing, featured in the newsletter

Warm intro
Between Guide and nonprofit, if both opt in

Theme report
Anonymized, for Charity Navigator

HOW EACH PAIRING RUNS

The playbook every pairing follows, from match to published case study.

Where the first Guides come from

The founding Guides come from Pooya's own network of social impact leaders and changemakers. **3 of 3 asked so far said yes.** After that, Guides apply with a session proposal: the problem they solve, their approach, past results, and a disclosure of anything they sell. We select on fit to the problem. Paying never buys a slot, and sessions are not sales pitches.

What every Changemaker and Guide gets

- A dedicated intro email and a playbook package
- A warm intro to each other
- **The full episode plan:** when it records, when it airs, and the format
- A prep checklist of what to bring
- A recommended 30-minute discovery call before recording

The episode format

5 MIN

Introduction

The guest, and the problem in the nonprofit's own words.

20 MIN

Discover, Define, Develop

- **Discover:** what is happening, what has been tried, the impact.
- **Define:** the real problem, and where roles or handoffs are unclear.
- **Develop:** options, the top three to try, one to measure.

5 MIN

Close

The plan for the next 30 days. Recording ends.

DAY 30

Follow-up interview

What was tried, what changed, what failed, what we learned. It becomes the case study and wraps the episode.

Pooya facilitates with a human-centered design structure: about 30 minutes recorded, plus the 30-day follow-up.

One pairing, start to finish

WHEN	WHAT HAPPENS
Week 0	Match made. Intro email, playbook package and warm intro go to both sides.
Week 1	30-minute discovery call. Record and air dates confirmed. Prep checklist sent.
Week 2	30-minute session recorded: 5-minute introduction, 20 minutes of Discover, Define and Develop, 5-minute close.
Weeks 4–6	Episode airs on podcast platforms and YouTube. The online resource is published.
Day 30	Follow-up interview on what changed. It wraps the episode, and the co-authored case study is published with backlinks.

Ground rules: opt-in at every step, the nonprofit owns its story, learning not critique, contact details stay private, nothing public without approval.

PODCAST PILOT MILESTONES

Nov 10, 2026	**Kyle agrees in principle** Charity Navigator runs the survey; MatchNice does the rest	DONE
Dec 2026	**One-pager, invite and survey copy approved** Plus list size, send date and the $15,000 Season 2 partnership	NOT STARTED
Jan 2027	**Charity Navigator sends the survey**	NOT STARTED
Feb 2027	**Themes to Charity Navigator; 25 problem frames paired** Guides and Changemakers confirmed for 25 episodes (see the funnel below)	NOT STARTED
By Mar 2027	**Up to three sessions recorded** 1 hour each	NOT STARTED
Apr–Jun 2027	**Episodes, case studies and 30-day results out**	NOT STARTED
Jul–Sep 2027	**Second wave of pairings** From the same opted-in database	NOT STARTED
Oct–Dec 2027	**Year-end theme report; Season 2 wrap**	NOT STARTED

WHAT IT TAKES TO REACH 25 EPISODES

Each episode needs one confirmed pairing: a Changemaker (a nonprofit with a problem frame) and a Guide. Working back from the goal, here is how many emails Charity Navigator would need to send.

STAGE	RATE	NEEDED
Emails Charity Navigator sends		2,084
Complete the survey	**10** %	209
Say yes to a session	**30** %	63
Respond and confirm	**50** %	32
Matched with a Guide	**80** %	25
Episodes recorded	**1** per ep.	**25**

Interactive in the app. Change the rates, the nonprofits per episode or the episode goal, and the numbers update. Interact on mobile or desktop.

To record 25 episodes, Charity Navigator sends about 2,084 emails, about 209 nonprofits answer, and 25 get paired with a Guide.

GUIDES SIDE

- **25 episodes need 25 Guide sessions.** One session per Guide means **25 Guides**, across the themes the survey finds.
- **3 of the 3 leaders asked so far said yes.**
- **The rest come from** MatchNice's network and from open applications.
- **Sorted by theme,** so each problem frame meets a Guide who has solved it before.

WHAT WE NEED TO DO

- **Get the list size** from Charity Navigator and send to enough 4-star charities to cover the emails needed above.
- **Send one reminder** from Charity Navigator about a week after the first email.
- **Follow up on every yes** quickly, through Charity Navigator, and book the 30-minute discovery call.
- **Recruit and vet Guides** by theme as soon as the themes are in, aiming for a few more than needed.
- **Confirm the 25 problem frames** and their pairings in February, then schedule recordings.

The rates are placeholders to show the math, not benchmarks. Replace them with real numbers after the January send. For comparison, the 400-answer goal on the one-pager, at these rates, gives about 48 pairings.

Rates in the funnel are placeholder assumptions until the first send gives real numbers. Draft · November 14, 2026

PARTNERSHIP GROWTH · FOR REVIEW | EXPLORATORY · WITH MOMOGOOD

Help nonprofits finish their impact story once. Use it everywhere donors give.

Donors and workplace-giving sponsors want to know what their money did. Most nonprofits never get around to telling them. A three-minute impact profile, pre-filled from public data, could fix that for Charity Navigator profiles and giving platforms like momoGood at the same time.

IN 30 SECONDS

- **A pre-filled impact profile** from public data that a nonprofit approves in about three minutes.
- **Used everywhere donors give:** the Charity Navigator profile and platforms like momoGood.
- **Feeds 8 of the 16 Impact & Measurement metrics** (5 fully, 3 in part) and prompts the org on 7.
- **Exploratory.** No decision needed now; first step is a call with momoGood.

WHO MOMOGOOD IS

momoGood is a giving platform that has served more than 3,000 organizations. It acquired Givergy (events and auctions) and Tatango (text-message fundraising), and it adds workplace giving: employer matching, payroll giving and volunteer tracking for companies and their employees. It is poised to disrupt the corporate social responsibility (CSR) space. Employer and employee gifts flow through it to nonprofits, and its top issue is showing those sponsors and donors what their gifts did. Impact cards help momoGood's donors trust more, re-engage and give more. Source: momoGood

WHY IT MATTERS

245K+
Nonprofits rated by Charity Navigator (its own figure)

4 · 10 · 17
Beacons, evaluation areas, and metrics in the Impact & Measurement beacon

#1
momoGood's issue: showing employer and donor gifts' impact back to them

3 min
Target time for a nonprofit to approve a pre-filled profile

Complete Charity Navigator profiles rank higher in its search. As of November 10, 2026, Charity Navigator's API does not yet expose evaluation areas or metrics ("being added").

WHAT THE PROFILE ENRICHES, IN CHARITY NAVIGATOR'S TERMS

Charity Navigator's Encompass rating has four beacons and 10 evaluation areas. A rating needs three years of 990s, and a **complete** Encompass rating also needs data the charity submits through the Nonprofit Portal. The profile only feeds those portal areas, and only with the nonprofit's consent. The 17 metrics of the

Impact & Measurement beacon are listed one by one.

ENRICHES we pre-fill it with sources · PARTLY we draft part, the org adds the rest · PROMPTS we ask, the org answers · NOT OURS we don't touch it

METRIC	PROFILE	WHAT WE ADD	HOW WE DO IT	WHY IT MATTERS
Impact & Measurement How a charity measures success, and how well its programs perform relative to their cost.				
IMPACT				
Impact Model	ENRICHES	Program, unit served, count and outcome, mapped from reach to outcome, each with a source.	Our model reads the 990, annual report and website. The org edits and approves.	It's the heart of the beacon: what a gift actually does.
Data Quality	ENRICHES	Every figure tagged guessed, estimated or measured, in Charity Navigator's own terms.	Each field carries its source and a tag. The org can change any tag.	Donors and Charity Navigator see how solid each number is.
Cost Per Outcome	ENRICHES	The inputs: all-in cost per unit from the 990 and the org's count. Charity Navigator and True Impact still judge it against peers.	Total expenses from the 990 ÷ the org's same-year count, rounded up and labeled approximate.	The inputs arrive ready, with no math for the nonprofit.
Cost Effectiveness	NOT OURS	Charity Navigator evaluates this itself.	Nothing.	The judgment stays with Charity Navigator.
Acquisition of Additional Data and Evaluations	NOT OURS	Outside evaluations are the charity's own to submit.	Nothing.	Stays with Charity Navigator.
MEASUREMENT				
Defined Target Population	ENRICHES	"Who we serve," drafted from the 990 and website, confirmed by the org.	Drafted by our model; the org confirms or edits it in the approval step.	Every other measurement metric builds on it.
Data Collected Across Program Lifecycle	PARTLY	Asks whether the org collects baseline and endline data, and records the answer.	One yes-or-no question in the approval step, recorded as given.	Shows whether results can be compared over time.
Understood Barriers to Access	PARTLY	Asks one question on barriers its constituents face.	A short prompt; the org answers in its own words.	Shows the org knows who it isn't reaching yet.
M&E Capacity · M&E System · Data Analysis Practices	PROMPTS	Yes or no questions the org answers; we don't pre-fill these.	Asked in the same approval step, never pre-filled.	Only the org can answer these honestly.

METRIC	PROFILE	WHAT WE ADD	HOW WE DO IT	WHY IT MATTERS
LEARNING				
Reports Results to Stakeholders	ENRICHES	The published card is a results report to donors and sponsors, refreshed with each 990.	The approved card publishes, with consent, to Charity Navigator, momoGood and other platforms.	One report reaches donors wherever they give.
Collects Constituent Feedback	PARTLY	A consented story and feedback slot the org fills in.	The org adds the story. We never collect constituent data ourselves.	Puts a real voice next to the numbers.
Responsible Disclosure · Uses Results to Improve · Leadership Commitment · Feedback Practices	PROMPTS	Questions the org answers; we never answer for it.	Prompts in the approval step.	These are practices only the org can speak to.
Leadership & Planning Whether the charity has the leadership capacity, strategic development and ability to adapt to deliver on its mission.				
LEADERSHIP				
Mission, Vision, Goals	PARTLY	Mission drafted from the 990; the org adds one goal.	Mission text from the 990; one prompt for a goal.	A clear goal ties the mission to the impact numbers.
PROGRAM PLANNING				
Sets SMART Objectives · Needs Assessment Practices	PARTLY	Reuses the target population; prompts for one measurable objective.	Carried over from Measurement, plus one prompt.	One measurable objective makes next year's results comparable.
GOVERNANCE				
Board-approved budget, independent board, minutes, 990 shared with the board	NOT OURS	From the 990 and the portal; we don't touch it.	Nothing.	Stays with Charity Navigator.
Accountability & Finance Whether the charity is accountable, transparent, and financially efficient and sustainable.				
FINANCIAL HEALTH · ACCOUNTABILITY				
Form 990 ratios and policies	NOT OURS	We read the same 990 but change nothing.	Nothing.	Charity Navigator's financial view stays untouched.
Culture & Compensation Whether the charity's practices strengthen its overall organizational health.				

METRIC	PROFILE	WHAT WE ADD	HOW WE DO IT	WHY IT MATTERS
WORKPLACE POLICIES · COMPENSATION PRACTICES				
Whistleblower and conflict-of-interest policies, CEO pay, benefits and pay policies	NOT OURS	Out of scope.	Nothing.	Out of scope.

Scorecard: of the 17 Impact & Measurement metrics, the profile enriches 5, partly fills 3, prompts the org on 7 and leaves 2 to Charity Navigator. Self-reported portal data expires after four years, so the profile refreshes with each new 990. Sources: How We Rate Charities, How Ratings Work (updated Nov 14, 2026) and Impact & Measurement (May 12, 2026).

HOW IT WOULD WORK

1
Invite
The nonprofit gets an invite from Charity Navigator, with Charity Navigator's mark.

2
Pre-fill
MatchNice's proprietary model, already built and improving with every profile, drafts it from publicly available sources: the 990, annual report, website and more, with a source on every field.

3
Approve
The nonprofit edits and approves in about three minutes. Nothing shows until then.

4
Complete and use
With consent, it completes the impact section of the Charity Navigator profile and enriches its nonprofit data. The card also shows to donors and sponsors on momoGood and other giving platforms.

5
Refresh
Each new 990 or payout prompts a quick "still true?" check, so the profile stays current.

HOW EVERYONE WINS

One approved profile moves through every partner, and each step leaves someone better off. The loop closes when donors see more impact, trust grows and the next gift comes back to the nonprofit.

1
Nonprofit
Approves its profile once.

Wins: a complete story used

→

2
MatchNice
Our model pre-fills; the nonprofit edits and confirms.

Wins: runs the profile, pairs it with matching,

→

3
Charity Navigator
With consent, the answers complete its profile.

Wins: more complete profiles and

→

4
momoGood and other platforms
Show the card where the gift happens.

Wins: donors who trust more, re-engage and give more, plus

→

5
Donors and sponsors
See what their gift did.

Wins: more impact shown, more trust, a

everywhere, less reporting work.

reports to sponsors.

impact data, no staff time.

wrap-ups for employer sponsors.

reason to give again.

↻ More trust brings the next gift, and the match, back to the nonprofit.

THE IMPACT CARD EXAMPLE, NOT ORG-APPROVED

Every nonprofit gets the same template. It edits the card, confirms it and chooses whether to publish. Publishing updates its impact profile everywhere it shows. Try the buttons below; this demo saves nothing.

Girl Scouts of Greater Atlanta

DRAFT · NOT APPROVED

EIN 58-0566190 · FY ending Sept. 2025

About $760

all-in cost per girl served per year, about $63 a month [1, 2]

WHO WE SERVE

Over 22,000 girls a year [2]

TOTAL EXPENSES

$16,734,154 [1]

HOW WE CALCULATED

Total expenses ÷ girls served. An average across all programs, all costs included.

IN OUR WORDS

A quote from the organization goes here. We never write it for them.

1. Form 990, FY ending Sept. 2025, total expenses (ProPublica Nonprofit Explorer)
2. Same Form 990, Part III program accomplishments: "over 22,000 girls"

Interactive in the app. Edit the card, confirm it and publish it to the profile. Interact on mobile or desktop.

Powered by MatchNice · Draft until the nonprofit publishes

Also for Season 2 of the podcast: after each episode, the Changemaker gets a card in the same template, pre-filled from the session (the problem, three things to try, the 30-day result). It edits, confirms and chooses to publish, and the card updates its impact profile.

THE FOUR BEACONS, AND WHERE THE IMPACT CARD FITS

HIGHLIGHTED Impact profiles pre-fill it with sources, or ask the org · PLAIN Charity Navigator scores it as today, untouched

Impact & Measurement

How a charity measures success, and how well its programs perform relative to their cost.

IMPACT

Impact Model · Data Quality · Cost Per Outcome · Cost Effectiveness

Leadership & Planning

Whether the charity has the leadership capacity, strategic development and ability to adapt to deliver on its mission.

LEADERSHIP

Mission, Vision, Goals · Leadership Investment · External Engagement · Adaptability

Acquisition of Additional Data and Evaluations

MEASUREMENT

- Defined Target Population
- Data Collected Across Program Lifecycle
- Understood Barriers to Access
- Invested in M&E Capacity
- Established M&E System
- Data Analysis Practices

LEARNING

- Reports Results to Stakeholders
- Collects Constituent Feedback
- Leadership Commitment to M&E
- Responsible Disclosure of Results
- Uses Results to Improve Programs
- Feedback Practices

See what impact profiles add, metric by metric ↑

PROGRAM PLANNING

- Sets SMART Objectives
- Needs Assessment Practices
- Shared Understanding of Theory of Change
- Theory of Change Practices
- Monitoring & Evaluation Practices

GOVERNANCE

- Board-Approved Budget
- Independent Board Size
- Independent Board Majority
- Document Board Minutes
- Tax Form Distributed to Board

Accountability & Finance

Whether the charity is accountable, transparent, and financially efficient and sustainable.

EVALUATION AREAS

- Financial Health
- Accountability

Scored from the 990 and policies. No proposal here changes it.

Culture & Compensation

Key workplace policies and practices, and compensation practices.

WORKPLACE POLICIES

- Whistleblower Policy
- Conflict of Interest Policy
- Workplace Policies
- Hiring and Employee Performance Practices

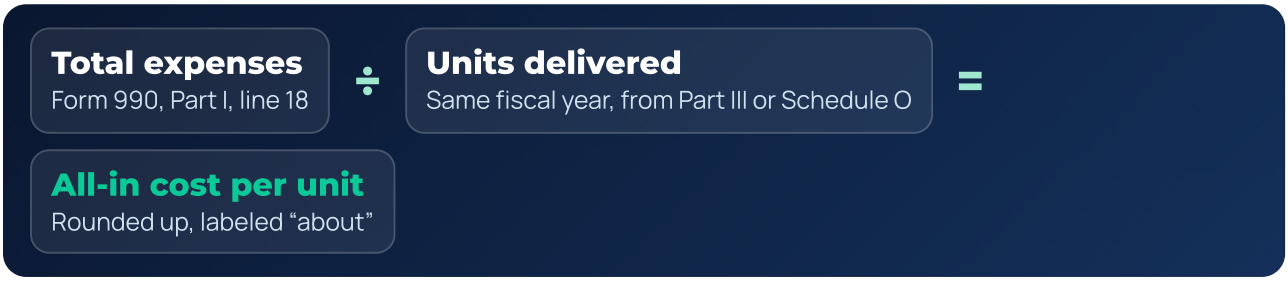
COMPENSATION PRACTICES

- Board Compensation
- CEO Salary Disclosed
- CEO Compensation Policy
- Employee Benefit Ratio
- Promotional Pay Policy
- Reviewed Compensation Structure

Impact profiles never answer for a charity and never change a score. Charity Navigator scores every metric as it does today. Sources: Charity Navigator, **How We Rate Charities** and its beacon pages for Impact & Measurement, Leadership & Planning and Culture & Compensation, read November 14, 2026.

THE MATH BEHIND THE CARD

One number does the work: what it costs, all in, to deliver one unit of the nonprofit's work. It comes from the nonprofit's own Form 990, so anyone can check it. Here is the whole calculation.



1. **Find the unit and the count.** The model reads Part III (program accomplishments) and Schedule O for one countable unit the nonprofit reports for that year: girls served, meals, homes. It quotes the sentence it used. Lifetime totals and pipeline counts are ignored.
2. **Divide, same year only.** Total expenses ÷ that count. Costs and counts must come from the same fiscal year. If a newer annual report has a newer count, it is shown for the nonprofit to confirm, never mixed into the math.
3. **Round up and say "about."** Up to the next dollar (the next cent under $10), so a gift is never overstated. "All in" means staff, rent and overhead are included, so the number is honest about what a gift really supports.
4. **One program instead of all of them.** When a nonprofit picks one program, overhead is shared out in proportion: program expenses × (total expenses ÷ total program expenses) ÷ that program's count.
5. **Turn it into a gift ladder.** $25, $50, $100 and $1,000, each on its own and with a 1:1 match. Counts are rounded down. The size of the unit sets the wording (below).
6. **Check it before anyone sees it.** Same-year check, a count check against the annual report (within 2%), a peer check (more than 2× the median for similar programs goes to a person), and a note when donated goods are part of the expenses.

Small unit · $100 or less
The ladder counts units.
"$25 helps provide about 10 meals."

Medium unit · $100 to $1,000
Time or share below one unit, whole units from $1,000.
"$100 helps provide about 6 weeks of Girl Scouts for a girl."

Big unit · over $1,000
Shares, plus a team rollup once pooled gifts reach a whole unit.
"Your team's gifts and matches helped provide about 2 homes this year." (illustrative)

In Charity Navigator's terms, this is a cost per **output** (a unit delivered), not a cost per outcome. It gives the Cost Per Outcome metric clean, sourced inputs. Charity Navigator and its impact partners still judge outcomes and cost-effectiveness. Every figure starts as **estimated** (from the 990) and becomes **reported** once the nonprofit confirms it.

THREE WORKED EXAMPLES PUBLIC 990 DATA, NOT ORG-APPROVED

Three Atlanta nonprofits, run through the method above from their latest public Form 990s. They show the three things the model does: a small unit, a medium unit, and a case where it stops and asks. None of these nonprofits has seen or approved these numbers.

1 · Small unit: Atlanta Community Food Bank

DRAFT · ESTIMATED

EIN 58-1376648 · fiscal year ending June 2025

$260,439,580 total expenses [1] ÷ 112.3 million meals [1] = **$2.319** → about $2.32 a meal, all in

GIFT	ON ITS OWN	WITH A 1:1 MATCH
$25	about 10 meals	about 21 meals
$100	about 43 meals	about 86 meals
$1,000	about 431 meals	about 862 meals

- **Flag for the nonprofit:** the 990 says the food was "enough for over 112.3 million meals" *combined with approved SNAP applications*. The model shows that wording and asks the food bank to confirm the meal count before the card goes live.
- **Flag, donated goods:** the same 990 reports $196,359,574 of non-cash contributions (Part VIII, line 1g). The all-in figure counts donated food at its value, and the card says so.

2 · Medium unit: Girl Scouts of Greater Atlanta

DRAFT · ESTIMATED

EIN 58-0566190 · fiscal year ending September 2025 · the card above

$16,734,154 total expenses [2] ÷ 22,000 girls [2] = **$760.64** → about $761 per girl per year (about $63 a month, $14.63 a week)

GIFT	ON ITS OWN	WITH A 1:1 MATCH
$25	about 1 week for a girl	about 3 weeks
$100	about 6 weeks	about 13 weeks
$1,000	about 1 girl for a full year	about 2 girls for a full year

- **Count is a floor:** Part III says "over 22,000 girls," so the true cost per girl is at or below $761. The card says "about."
- **One program instead:** the camp program spent $5,266,546 on "over 9,000 experiences" [2]. Sharing overhead in proportion ($16,734,154 ÷ $13,921,270 total program expenses) gives **about $704 per camp experience**. The 990 counts experiences for girls and adults, so the nonprofit would confirm the unit.

3 · When the model stops: Atlanta Habitat for Humanity

EIN 58-1535414 · fiscal year ending December 2024

NEEDS THE NONPROFIT

$24,068,495 total expenses [3]. One program line reports **47 new houses** and **175 houses repaired or repainted** [3].

- **Why it stops:** the 990 doesn't split costs between new homes and repairs. Dividing everything by 47 homes would say about $512,000 a home, which overstates it because repairs share those costs. The model never publishes a number like that.
- **What it does instead:** it asks the nonprofit two questions (which unit to show, and roughly what share of program costs it takes), then runs the same math. Until then, nothing shows.

The output: one record per nonprofit

Each card is saved as a versioned record. With the nonprofit's consent, this is what a giving page, a sponsor report or Charity Navigator's profile would read. Example 2, as a draft:

```
"ein": "58-0566190",  "status": "draft",  "data_quality": "estimated",
"unit": "girl served per year",  "count": 22000,  "count_source": "990 Part III, line 4a
"fiscal_year": "Oct 2024 to Sep 2025",  "total_expenses": 16734154,
"all_in_cost_per_unit": 761,  "unit_size": "medium",
"ladder": [ { "amount": 100, "matched": 200,
             "line": "$100 helps provide about 6 weeks of Girl Scouts for a girl" } ],
"flags": [ "count is a minimum (over 22,000)" ],
"sources": [ { "n": 1, "title": "Form 990 FY2025", "lines": "Part I line 18; Part III 4a
"approved_by": null,  "valid_until": "18 months after approval, or the next 990"   // dr
```

1. Atlanta Community Food Bank, Form 990, FY ending June 30, 2025: Part I line 18, Part III line 4a, Part VIII line 1g. ProPublica Nonprofit Explorer
2. Girl Scouts of Greater Atlanta, Form 990, FY ending Sept. 30, 2025: Part I line 18, Part III lines 4a and 4b, Part IX line 25. ProPublica Nonprofit Explorer
3. Habitat for Humanity in Atlanta, Form 990, FY ending Dec. 31, 2024: Part I line 18, Part III line 4a. ProPublica Nonprofit Explorer

GUARDRAILS

The model drafts; people decide. Every card has to clear these before a nonprofit even sees it, and again before it publishes.

1. **95% accuracy, proven, not assumed.** Each model version is checked on a blind human audit of at least 400 fields. It ships only if the lower end of the 95% confidence interval is at or above 95%. For example, 392 of 400 correct (98%) gives a lower bound of 96.1% and passes; 388 of 400 (97%) gives 94.8% and fails.
2. **95% consistency.** Each profile is drafted three times. The figures must match across the three runs, with the agreement rate's 95% lower bound at or above 95%. Any field that disagrees goes to a person.
3. **The gate applies per field type.** Counts, costs, populations and missions are scored separately, so a strong field can't hide a weak one.
4. **A linked source on every figure.** Each number carries a numbered, public link. No link, no figure.
5. **Confidence shown on every field.** High, medium or low. Low-confidence fields stay hidden until the nonprofit fills or confirms them.
6. **Nothing public without approval.** Every card is a draft until the nonprofit edits, confirms and chooses to publish. It can unpublish at any time.
7. **Never invent.** No made-up outcomes, quotes, stories or photos. The "in our words" slot is written by the nonprofit only.
8. **Charity Navigator's data-quality terms.** Every figure is labeled guessed, estimated or measured.
9. **Same-year figures.** Costs and counts must come from the same fiscal year. Mismatches are flagged, and cards refresh with each new 990 and expire if not reconfirmed.
10. **Peer sanity check.** A cost per unit far outside the range for similar programs goes to human review before the nonprofit sees it.
11. **Honest wording.** "Helps provide about," all-in averages labeled as such, and a how-we-calculated link on every card.
12. **Never promise a rating change.** Charity Navigator rates. The profile only helps complete it.
13. **Consent and privacy.** Answers go to Charity Navigator only with the nonprofit's consent. No donor PII. All messages to nonprofits come from Charity Navigator.
14. **Full audit trail.** Every card records the model version, inputs, sources, edits and who approved it. Corrections from nonprofits are logged and used to improve the model.
15. **Fair to small nonprofits.** Organizations that are listed but not rated, or that file a short 990, get the same template and simply answer more questions themselves.
16. **No percentage fees.** Nonprofits never pay a cut of gifts for their card.

NEXT STEPS

Nov 2026	**MatchNice asks momoGood how its donor and corporate CSR wrap-up reports work** Decides where the impact card shows and how sponsors see it	NOT STARTED
After the 2027 agreement	**Talk with Charity Navigator about a profile-data partnership**	NOT STARTED
TBD	**Pre-fill test on 20 to 30 nonprofits from public 990s** How often a usable count is found	NOT STARTED
TBD	**momoGood pilot with about 25 nonprofits** Gate: approval rate and time	NOT STARTED

Sources: Charity Navigator Impact & Measurement page (May 12, 2026), developer.charitynavigator.org (Nov 10, 2026), Girl Scouts of Greater Atlanta FY2025 990.

Draft · November 14, 2026

PARTNERSHIP GROWTH · FOR REVIEW

PULLED FROM THE CHARITY NAVIGATOR API

Every 4-star charity can add Charity Navigator's Four-Star badge to its MatchNice banner. Trust, right next to the match.

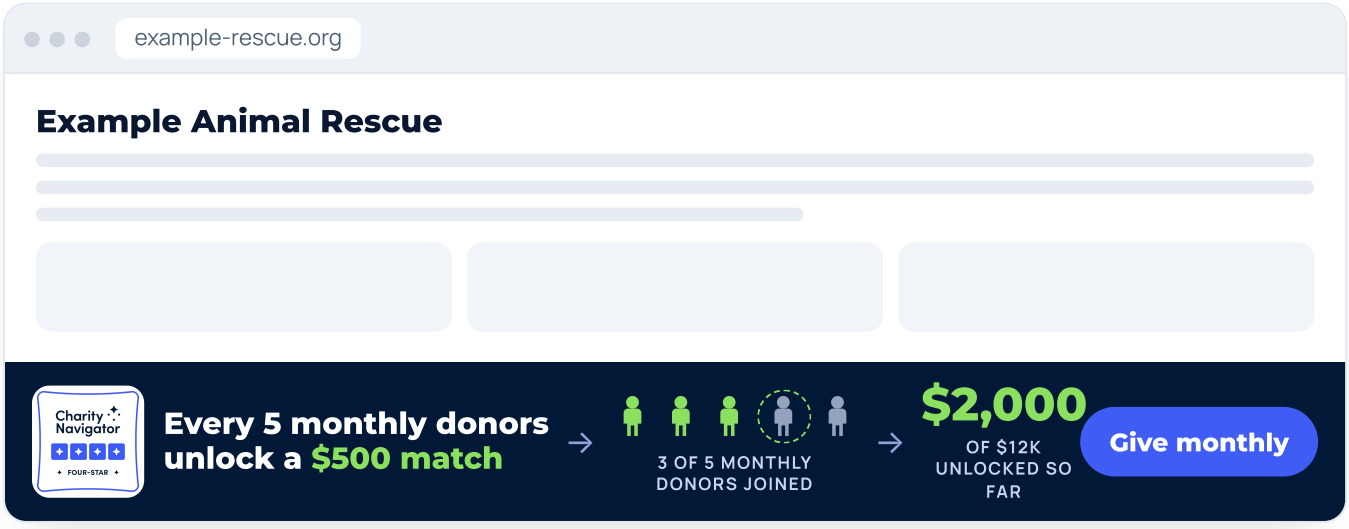
Any nonprofit on MatchNice that holds four stars can add the Four-Star badge as an object on its banner. MatchNice reads the rating from Charity Navigator's API, so it is always current, and the badge sits beside the match, the donor count and the Give button, right where donors decide.

IN 30 SECONDS

- **The Four-Star badge, on the banner:** any 4-star charity on MatchNice can add it in its banner settings, next to its match and its Give button.
- **Pulled from Charity Navigator's API,** so it is never typed in by hand or out of date, and only 4-star charities are offered it.
- **On phones it stays in view** while the banner's messages rotate. Tapping it opens the charity's Charity Navigator profile.
- **The same badge works as a website footer,** from our September 2026 proof of concept.

SEE IT: THE FOUR-STAR BADGE ON A MATCHNICE BANNER

A sample on a made-up nonprofit, in the style of MatchNice's Donor Unlock banner and in Charity Navigator's colors. The numbers are a sample.



Interactive in the app. Switch the badge on and off, and preview the banner on a phone. Interact on mobile or desktop.

HOW IT WOULD WORK

1

Match the charity

MatchNice already links each account to its Charity Navigator profile through the API.

2

Check the rating

If the charity holds four stars today, the badge appears in its banner settings, switched off until it opts in.

3

Add the badge

One toggle. It sits on the banner next to the match, and tapping it opens the charity's Charity Navigator profile.

4

Stay current

MatchNice re-checks the rating daily. If it changes or lapses, the badge updates or hides itself.

HOW EVERYONE WINS

Charity Navigator

Its Four-Star mark on every 4-star charity's banner, at the moment donors decide, and more visitors to its profiles.

Nonprofits

A free trust signal next to the Give button, with nothing to design.

Donors

Proof the charity is well run, right where they give.

MatchNice

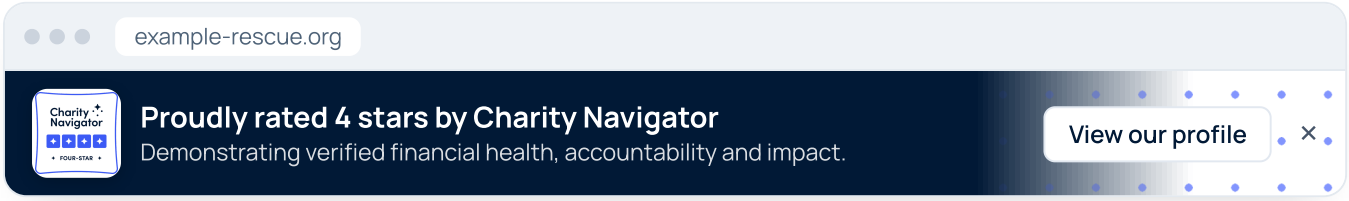
Trust that strengthens every match it powers.

GUARDRAILS AND NEXT STEPS

- **Only the current rating:** the badge shows only for charities that hold four stars today, read from Charity Navigator's API.
- **Charity Navigator approves** the mark, the wording and the design before anything ships.
- **No donor data is shared.** The badge only links to the charity's public profile.
- **Later:** show the Charity Navigator score itself, and beacons such as Impact & Measurement, once Charity Navigator's data terms allow it.
- **Next step:** agree on the brand rules and the API fields, then pilot with 25 4-star charities that run matches on MatchNice, and compare gift rates and profile visits with and without the badge.

ALSO: THE SAME BADGE AS A WEBSITE FOOTER

From our September 2026 proof of concept: a 4-star charity installs it with one snippet, or an embed for Wix, Squarespace or WordPress. Its button goes to the charity's Charity Navigator profile or to its donate page. A mockup on a made-up nonprofit.



Interactive in the app. Choose where the footer's button links. Interact on mobile or desktop.

Ten features live today. Better every week, from real campaigns.

Everything here runs on one MatchNice platform. **Released** means live in the product today. **Rebuilding now** means we are improving it right now, based on what nonprofits told us and what we saw in real campaigns. **On the roadmap** is where we are headed. AI marks the features where AI drafts the messages or explains the results; people always review and send. Status as of November 16, 2026.

IN 30 SECONDS

- **10 features live:** matching and recognition, mobile-ready banners, MatchID, Campaign Pages, Donor Unlock, Outreach Co-Pilot and peer-to-peer matching.
- **Rebuilding now, from real use:** a simpler Campaigns list, integrations you can finish yourself, a sign-up that fills itself in and the next Campaign Page Builder.
- **Where it's headed:** Co-Pilot guided setup, a match-year calendar, a portal and pages for sponsors, and giving days.
- **How we ship:** a test group first, then full testing, then release notes for everyone.

LIVE TODAY

RELEASED

Multiply every gift

Each gift in a set window is matched, 2X or more, with a live banner showing progress and the deadline.

Why it matters: a deadline and a multiplier give donors a reason to give today, not someday.

RELEASED

Matcher recognition

An optional "Proud Matcher" or "Proud Sponsor" label on the banner names who made the match possible.

Why it matters: sponsors see their name on every gift, which makes asking them again easier.

RELEASED

Banner modernization and mobile optimization

The match banner adjusts to the screen it's on, from desktop down to a phone.

Why it matters: donors on phones see the whole match, not a cut-off banner.

RELEASED

MatchID: Sponsor Finder AI

A nonprofit uploads its gift history once. Names, emails, phones and addresses are stripped before anything is stored. Each donor gets a 0 to 100 score for the campaign, plain-English reasons, Safe, Balanced and Bold ask sizes, and the best month to ask.

Why it matters: your next match sponsor is often already in your own giving history.

RELEASED

MatchID: Pipeline

Five stages from Prioritized to Confirmed. A confirmed pledge opens a four-step stewardship checklist and adds the sponsor to the campaign, shown by name, anonymously, in honor or memory of someone, or with a logo.

Why it matters: every sponsor conversation in one place, from the first ask to the thank-you.

RELEASED

MatchID: Campaign Outreach AI

Ready-to-copy sponsor asks for every campaign, plus messages for five donor audiences, such as lapsed donors and donors ready for a second gift. The nonprofit always reviews and sends.

Why it matters: less time writing asks, and every message stays yours to review and send.

RELEASED

Campaign Pages

A ready-made match page a nonprofit edits by clicking on the page itself, with one impact line per page. Share links, giving chains and the Ripple Map are built in: each donor gets a gift link, and gifts made through it ripple out on a live map, with no names or amounts shown.

Why it matters: a match page that looks finished in minutes, and that donors share for you.

RELEASED

Donor Unlock Banner

New monthly donors unlock the match together, with the every-screen banner layout (Nov 15).

Why it matters: turns one busy giving moment into new monthly donors.

RELEASED

Outreach Co-Pilot AI

Drafts sponsor asks and donor messages for each donor group, built on MatchID. The nonprofit always reviews and sends.

Why it matters: real help for small teams with no fundraising staff.

RELEASED

Peer-to-peer matching

Matches what supporters raise on their own fundraising pages.

Why it matters: supporters' own fundraising pages get the match too, which suits giving days.

REBUILDING NOW, FROM REAL USE

We watched nonprofits set up and run real campaigns, end to end. These are the changes they asked for most, and they are being built now.

REBUILDING NOW

A simpler Campaigns list

One clean table: name, type, status (Draft, Scheduled, Live or Ended), raised against goal, supporters and dates, with search and filters. Each campaign gets its own Overview, and ended campaigns stay in the list.

Why it matters: see every campaign and how it is doing at a glance.

REBUILDING NOW

Integrations you can finish yourself

Every step shows as a numbered checklist that ticks itself off, with screenshots, one button per step and a short video. Send the steps to your web admin in one click, and finish with a $1 test gift that proves it works.

Why it matters: no guessing whether the match is really connected to your giving form.

REBUILDING NOW

Sign-up that fills itself in

Enter your EIN or your name, and your website and address fill in for you.

Why it matters: fewer forms between you and your first match.

REBUILDING NOW

The next Campaign Page Builder

The builder behind Campaign Pages gets its biggest upgrade yet, so your page looks finished from the first click.

Why it matters: a page you are proud to share, without a designer.

REBUILDING NOW

Donor Unlock, inside campaign setup

Set up a monthly-donor unlock while you build the campaign, instead of as a separate step.

Why it matters: recurring giving becomes part of every match, not an add-on.

REBUILDING NOW

Friendlier emails from MatchNice

Your logo, the person's name, one clear button and warm words. Sent at the reader's local time, never more than one a day or three a week, and they stop after three nudges.

Why it matters: emails people are glad to get, and act on.

WHERE IT'S HEADED

ON THE ROADMAP

Co-Pilot guided setup

Co-Pilot walks you through setting up a match, one question per screen, and suggests what to do next.

Why it matters: your first match, set up with a guide beside you.

ON THE ROADMAP

A match-year calendar

Every match moment of your year, such as year-end, Giving Tuesday and your giving days, in one calendar on your Home page.

Why it matters: plan the year's matches, and the sponsors behind them, months ahead.

ON THE ROADMAP

Sponsor Portal and live reporting

Sponsors follow their match live and get the full wrap report at the end.

Why it matters: the renewal story for every sponsor, written for you.

ON THE ROADMAP

Sponsor pages

Each match sponsor gets its own page and map on its own link, for its employees and network to share.

Why it matters: sponsors promote your match to their own people.

ON THE ROADMAP

Sponsor and donor emails AI

Personalized email sequences across the nonprofit, sponsor and donor journeys.

Why it matters: the right message to each person, without building it by hand.

ON THE ROADMAP

Impact profiles

A pre-filled impact card, shown only once the nonprofit approves it, with the math shown.

Why it matters: donors see what a gift does, with a source on every number.

ON THE ROADMAP

Dollar milestones and first gift multiplied

The match unlocks in steps as dollars come in, or a new monthly donor's first gift is matched for 3 to 12 months.

Why it matters: more match formats for different sponsors and goals.

ON THE ROADMAP

Giving days

Matching built for community giving days, alongside your own campaigns.

Why it matters: a reason for the whole community to give on the same day.

HOW WE SHIP

1

A test group first

A new feature turns on for a small group of nonprofits before anyone else.

2

Tested end to end

Our quality and user testing walks through every step, from sign-up to a live match, on desktop and phone.

3

Released to everyone

It turns on for all nonprofits once it passes.

4

Release notes

You get a short note on what changed, why, and what to try first.

Your feedback sets the order. Everything under "Rebuilding now" came from nonprofits using MatchNice.

WHAT IT ADDS FOR CHARITY NAVIGATOR, ON TOP OF THE BUILD

One platform, not a one-off

The 2027 build sits on the MatchNice platform, so releases like these can reach your lists and funds without a new project.

More nonprofits ready to match

MatchID and Outreach help the nonprofits you rate find and ask their own sponsors.

Sponsors who renew

Recognition, sponsor pages and live reporting give every sponsor a reason to come back next year.

↔ **For Charity Navigator:** "Multiply every gift" is the match type behind October's +13% on your giving page. We'll pick together which of the rest come to your lists and funds first, as part of the 2027 plan.

Released = live in the MatchNice product as of November 16, 2026. Rebuilding now and roadmap items are plans, and details change as features ship.

November 16, 2026