



**America's Charities®**

# **Summary Annual Report 2019**






# Message from Our Leadership

Workplace giving is about building community – internally and externally. It amplifies everything we touch; giving, employee experience, and community partnerships. It allows us – individual donors and corporate entities alike – to align our actions with who it is we want to be and what we want to be known for in the community.

At America's Charities, empowering businesses and their employees to help each other and the community around them is what we do. That dual external and internal focus is where we excel, and it's what is driving our organization's growth and success, as we've highlighted on the following pages of this report.

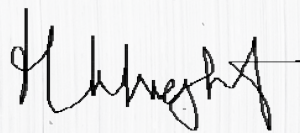
As a result of our organization's strategic partnerships, extensive employee giving solutions, and the dedicated service America's Charities' team provides its members and clients, we doubled our client base this year, were able to distribute 7 percent more dollars to nonprofits in 2019 compared to 2018, and have raised more than \$750 million since our founding.

There is power in collective action. To our clients, nonprofit members, and partners – thank you for serving as catalysts for change and entrusting America's Charities with your social impact goals. We are honored to work with you.



Jim Starr

President and CEO



Heather Lofkin Wright

Board Chair





# Our Impact



**1 Million+**

number of transactions our funds management team processes each year

**40,000**

approximate number of payments our team sends to charities each year

## Employers

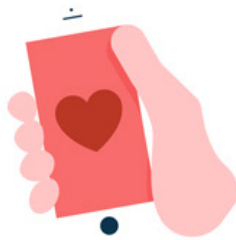


**241** public and private sector funding partners (CFC, State/Local/Private Sector)

**60** employer clients whose workplace giving and volunteer campaigns we manage and funds we distribute

**10% increase** Average increase in pledge volume year over year from increased employee engagement in campaigns we manage

## Employees



**587k+** # employees given the opportunity to donate or volunteer through workplace giving and employee engagement campaigns we manage

## Nonprofits



**131** nonprofit members served in 2019

**8-9k** number of member & non-member nonprofits supported each year

**\$29.6 million** total funds distributed to nonprofits in 2019



# Charitable Funds Management, Technology, and Partnerships



**U.S. CHAMBER OF COMMERCE FOUNDATION**  
Corporate Citizenship Center

## U.S. Chamber Foundation and America's Charities Partner to Help Companies Support their Employees Facing Hardships

On May 21, 2019, The U.S. Chamber of Commerce Foundation, a leading resource for businesses dedicated to making a difference, announced a partnership with America's Charities to provide employers the support they need to offer Employee Assistance Funds (EAFs) to their employees. Distributing EAF resources through an external partner increases a fund's flexibility and lowers the company's administrative burden. Each EAF is tailored to the parameters and qualifications provided by the company, ensuring it aligns with its corporate values and culture. With an already established infrastructure, and decades of experience supporting corporate investments in employees and communities, the U.S. Chamber Foundation and America's Charities can quickly launch and mobilize a company's EAF.

[Click here](#) to read the partnership announcement that The U.S. Chamber Foundation shared with its members.



## America's Charities and SmartSimple Partner to Scale Impact with End-to-End Employee Giving Software and Service Solution



SmartSimple, a cloud-based tracking and reporting platform that helps organizations automate their critical processes, partnered with America's Charities on June 18, 2019. Together, with SmartSimple providing its new Engage (Platform3) technology and America's Charities's providing its

backend funds management expertise, the partnership offers companies an end-to-end solution to manage, track, and report across all giving and engagement programs, directly align corporate values with the SDGs, and even help employees leverage their activities and impact around common goals. This new full-scale solution—SmartSimple's Engage software plus America's Charities complete funds management service—helps companies stop focusing on the many small tasks that comprise every giving, engagement, and CSR program and instead focus on what matters: building culture, supporting communities, and changing the world. [Click here](#) to read the full partnership announcement.



## America's Charities Acquires Causecast Giving Platform, Further Strengthening Its Support of the Social Good Sector

On July 31, 2019, America's Charities announced its acquisition of the Causecast giving platform, further strengthening its ability to help employers achieve their giving, engagement, and social impact goals, and better help nonprofits fundraise unrestricted, sustainable dollars through the workplace.

Following four years of Causecast partnership, the acquisition is a natural next step for America's Charities and helps expand its already robust suite of giving and engagement solutions offered to the stakeholders of social change.

"I am thrilled to leave the Causecast giving platform in America's Charities capable hands," stated Ryan Scott, founder and CEO of Causecast. "I am satisfied knowing the company I created will continue to serve the greater good and help businesses and employee donors change the world. America's Charities' extensive giving and engagement experience, combined with their commitment to philanthropy and social impact, makes them an ideal long-term partner for the philanthropic sector – and to carry this legacy forward."

[Click here](#) to read the acquisition announcement.



# Advocacy, Speaking Engagements, and Events



## Educating Donors and Employers About Payroll Giving

Workplace giving has transformed over the last decade, and America's Charities has embraced that change, testing and refining new approaches that pave the way for others in our industry to follow. In February 2019, we launched the "Saving the World, One Paycheck at a Time" campaign to revisit, revitalize, and emphasize this important point: employee giving is powerful, it works, and it benefits nonprofits, donors, and employers alike.

Promotion of the "Saving the World, One Paycheck at a Time" campaign started with a [series of webinars](#), featuring voices and perspectives of workplace giving stakeholders, campaign coordinators, and nonprofits who participate in workplace giving campaigns. We concluded the webinar series with an in-person panel discussion at America's Charities [2019 Collective Impact Conference](#) in Washington, D.C. Ongoing promotion of the "Saving the World, One Paycheck at a Time" campaign will be integrated with messaging promoted through our [annual fall advertising campaign](#), which is designed to increase awareness about workplace giving and specific nonprofit causes, reaching active-duty military and Federal employees, as well as private sector employees across the country.



## Change-makers from Across the Country Attended America's Charities Inaugural Collective Impact Conference in Washington, D.C. to Tackle Real-world Challenges via Employee Giving and Engagement

On June 7, 2019, more than 100 change-makers from across the country came together in Washington, D.C. for America's Charities inaugural

Collective Impact Conference, hosted by Hogan Lovells US LLP. The only event of its kind to bring together private and public sector employers and nonprofits, the Collective Impact Conference featured employee giving, engagement, and social impact experts who lead the audience in an afternoon full of discussions about what's new, what's tried and true, and what's yet to come as it relates to tackling real-world challenges via giving and engagement.

Some of the conference speakers included:

- Matthew Nelson, New York Life
- Wendi Safstrom, SHRM Foundation
- Diahann Smith, National Cooperative Bank (NCB)
- Heather Lofkin Wright, PwC US (PricewaterhouseCoopers)

[Click here](#) for access to video recordings from the event.



## Sharing America's Charities' Expertise Through Speaking Engagements and Conferences

In addition to attending several social responsibility and employee engagement-focused conferences throughout 2019, our team also had the opportunity to share our expertise through speaking engagements and by moderating discussions, which featured some of America's Charities' nonprofit members and Board directors. Among those we attended and spoke at are SHRM's Annual Conference & Exposition, the U.S. Chamber of Commerce Foundation's Corporate Citizenship Conference, 3BL Forum, and BBCON, which collectively convene more than 22,000 business leaders and social responsibility practitioners.



# Employee Engagement, Program Efficiency, and Industry Expertise



## America's Charities and Its All-in-One Giving Solution Featured in the RW Institute's Global Corporate Volunteering, Giving and Grants Technology Review

On November 14, 2019, RWI released its first-ever global [Corporate Volunteering, Giving and Grants Technology Review](#), sponsored by the Bill & Melinda Gates Foundation. Providing a 360-degree view of the technology market and information on 51 known solution providers, respectively headquartered across 13 countries and 5 continents, the review provides a high-level comparison solutions and showcases America's Charities' comprehensive leadership in the space.

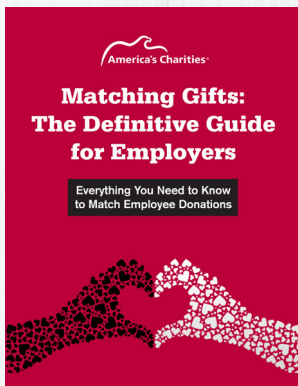


## America's Charities Publishes Two New Guides, Developed for Employers Looking to More Efficiently Manage their Matching Gifts and Employee Giving Program Processes

Both guides, summarized below, can be downloaded for free from America's Charities' expansive library of case studies, white papers, and reports at [www.charities.org/resources](http://www.charities.org/resources).

### [Switching Workplace Giving Providers: Your Guide for Choosing a New Partner for Your Employee Giving Program](#)

Changing workplace giving providers and platforms is a multi-step effort that involves soliciting bids, reviewing proposals, interviewing candidates, making your selection, negotiating a deal, and getting approval from your top executives. America's Charities' guide, "Switching Workplace Giving Providers: Your Guide for Choosing a New Partner for Your Employee Giving Program," was designed to help employers navigate this process so they can make a smart, informed choice.



### [Matching Gifts: The Definitive Guide for Employers](#)

A successful matching gift program can help companies attract and retain employees, showcase corporate values, enhance employees' experience, and — most importantly — make a difference in the community. But while workers clearly value matching gift programs, a surprising number of companies have yet to join the party. America's Charities' guide, Matching Gifts: The Definitive Guide for Employers, explains what a matching gift program is, highlights the benefits and value of matching employee donations, details how to set up a matching gift program, including five key things an employer should consider before getting started, and offers real-life examples of matching gift programs and advice from America's Charities' team of experts.



# Consolidated Balance Sheet

December 31, 2019

2019

## ASSETS

Cash .....	\$9,238,532
Promises to give (pledges) .....	1,760,230
Member charity fees receivable, net of allowance for doubtful accounts of \$103,746 .....	711,634
Other receivables .....	833,872
Other assets .....	180,963
Property and equipment, net .....	2,842
Deferred leasing costs .....	2,600
Intangible assets, net .....	12,821
Goodwill, net .....	173,011

**Total Assets.....\$12,916,505**

## LIABILITIES AND NET ASSETS

### Liabilities

Accounts payable and accrued expenses .....	\$424,321
Campaign funds payable to member/nonmember charities .....	10,329,659
Deferred revenue .....	616,484
Note payable .....	100,000
Deferred rent .....	67,559

**Total liabilities .....\$11,538,023**

Commitment and contingencies (Notes 7, 8 and 10 of Audited Financial Statements)

### Net Assets without Donor Restrictions

Undesignated .....	1,378,482
Board designated .....	—
<b>Total net assets .....</b>	<b>\$1,378,482</b>

**Total Liabilities and Net Assets.....\$12,916,505**

For a complete look at the Audited Financial Statements and other key documents about the transparency and accountability of America's Charities and our family of federations, please visit us on the web at:  
[www.charities.org/annualreports](http://www.charities.org/annualreports)



# Consolidated Statement of Activities

Year Ended December 31, 2019

2019

## SUPPORT AND REVENUE

Amounts raised in campaigns, net of campaign expenses incurred by other organizations and shrinkage:

Combined Federal Campaign.....	\$4,945,834
Campaign management services .....	22,018,767
Private sector .....	949,553
State and local .....	1,732,111

**Total net amounts raised in campaigns .....** 29,646,265

*Less amounts raised on behalf of others.....* 29,390,840

Support designated to America's Charities and Affiliates..... 255,425

Member charity fees.....	2,324,366
Campaign management fees .....	1,668,071
Campaign advertising fees .....	139,733
Donated services .....	563,438
Other.....	109,027

**Total Support and Revenue.....**\$5,060,060

## EXPENSES

### Program services

Member campaign services.....	1,285,485
Campaign management services .....	3,027,306

**Total program services .....**\$4,312,791

### Supporting services

Management and general .....	547,878
Fundraising.....	310,193

**Total supporting services .....**\$858,071

**Total expenses.....**\$5,170,862

Change in net assets .....

## Net Assets

Beginning.....	1,255,498
Cumulative effect of adoption of ASC 608 (Note 1) .....	233,786
Ending.....	\$1,378,482

See notes to consolidated financial statements.



# 2019 Nonprofit Members

## America's Charities

- 100 Black Men of America
- Alzheimer's Disease Research
- American Campaign for Prevention of Child Abuse and Family Violence
- American Center for Law and Justice
- American Civil Liberties Union Foundation, Inc.
- Amnesty International USA
- Best Friends Animal Society
- Boy Scouts of America
- Brady Center To Prevent Gun Violence
- Canine Partners for Life
- Christian Appalachian Project
- Diabetes Research & Wellness Foundation
- Feed the Children
- Feeding America
- Fisher House Foundation, Inc.
- Gay, Lesbian, Bisexual & Transgender Scholarship Fund - Point Foundation
- Human Rights Campaign Foundation
- Latino Youth Education Fund
- Lions Clubs International Foundation
- Meals On Wheels America
- Mercy Housing
- Mothers Against Drunk Driving
- NAACP Foundation
- NAACP Legal Defense and Educational Fund, Inc.
- National Association of the Deaf
- National Down Syndrome Congress
- National Fallen Firefighters Foundation
- National Law Enforcement Officers Memorial Fund
- National Military Family Association, Inc.
- National Organization of Black Law Enforcement Executives (NOBLE)
- National Trust for Historic Preservation in the United States
- PetSmart Charities, Inc.
- Population Connection
- Rails-to-Trails Conservancy
- Southern Poverty Law Center
- The Conservation Fund
- Thurgood Marshall College Fund
- YWCA USA
- Wounded Warrior Project, Inc.

## Children First - America's Charities

- Believe In Tomorrow National Children's Foundation
- Campaign for Tobacco-Free Kids
- Cancer Research for Children - CureSearch
- Childhood Education International (CEI)
- Children's Hospital
- Children's House at Johns Hopkins Hospital
- Father Flanagan's Boys' Home
- First Candle, Inc.
- Give Kids The World
- "I Have A Dream" Foundation®
- Junior Achievement USA
- Make-A-Wish Foundation of America
- National Black Child Development Institute
- Operation Warm
- Prevent Child Abuse America
- Reading Is Fundamental, Inc. (RIF)
- Ronald McDonald House Charities®
- Share Our Strength
- STANDUP FOR KIDS
- Teach For America
- The Hole in the Wall Gang Fund
- The Sesame Street Yellow Feather Fund
- Tiger Woods Foundation



# 2019 Nonprofit Members

## Health First - America's Charities

- Alzheimer's and Aging Research Center
- Arthritis & Chronic Pain Research Institute
- Breast Cancer Coalition
- Breast Cancer Research Center
- Cancer Research and Prevention Foundation (Prevent Cancer Foundation)
- Christopher & Dana Reeve Foundation
- Diabetes National Research Group
- Diabetes Research Institute Foundation, Inc.
- International Planned Parenthood Federation, Western Hemisphere Region
- Melanoma Research Alliance
- Memorial Sloan Kettering Cancer Center
- Multiple Sclerosis Association of America
- NARAL Pro-Choice America Foundation
- National Down Syndrome Society
- Ovarian Cancer Research Alliance
- The LIVESTRONG Foundation
- The Marfan Foundation
- Tuberous Sclerosis Alliance
- United Cerebral Palsy
- Urology Care Foundation

## Community First - America's Charities

### Washington, DC Metropolitan Area:

- A Wider Circle
- Alzheimer's – Insight Memory Care Center
- Animal Welfare League of Arlington
- Arlington Housing Corporation (AHC Inc.)
- Arts and Humanities Council of Montgomery County
- Boy Scouts of America, National Capital Area Council
- Capital Caring
- Catholic Charities of the Diocese of Arlington, Inc.
- Duke Ellington School of the Arts
- Food for Others, Inc.
- Foundation for the National Institutes of Health
- Generation Hope
- Good Shepherd Housing & Family Services, Inc.
- Habitat for Humanity of Northern Virginia
- Habitat for Humanity of Washington, D.C.
- Hope Connections for Cancer Support
- House of Ruth
- Lorton Community Action Center
- Lydia's House in Southeast
- Make-A-Wish Foundation of the Mid-Atlantic
- Melwood Horticultural Training Center, Inc.
- Miriam's Kitchen
- Montgomery Hospice, Inc.
- PHILLIPS Programs
- Rebuilding Together DC Alexandria
- Rebuilding Together Montgomery County, Inc.
- ServiceSource
- Shepherd's Table
- Signature Theatre, Inc.
- The Child & Family Network Centers
- The Children's Inn At NIH
- The Salvation Army - National Capital Area Command
- WETA (Greater Washington Educational Telecommunications Association)
- YMCA of Metropolitan Washington
- Youth For Tomorrow - New Life Center, Inc.



# 2019 Nonprofit Members

## Community First - America's Charities

### **Connecticut:**

- Connecticut Food Bank

### **Florida:**

- Christian HELP Foundation

### **Georgia:**

- PAWS Atlanta

### **New York:**

- Freedom Guide Dogs for the Blind
- Junior Achievement of New York

### **North Carolina:**

- Time Out Youth, Inc.

### **Pennsylvania:**

- American Red Cross, Eastern Pennsylvania Region
- AIDS Fund
- Pennsylvania Coalition Against Domestic Violence
- SPCA of Luzerne County, Inc.
- WOMEN'S WAY

### **Texas:**

- American Red Cross Serving Central Texas
- Caring for Children Foundation of Texas, Inc.
- Art Spark Texas (formerly called VSA Arts of Texas)



# 2019 Board of Directors

## America's Charities Board

### Heather Lofkin Wright

Chair (as of 6/6/2019)  
US Corporate Responsibility Director,  
PricewaterhouseCoopers LLP (PwC)

### George Weiner

Chairman (until 6/6/2019)  
Immediate Past Chairman (as of 6/6/2019)  
Founder & CEO, Whole Whale

### Janet Gibbs

Treasurer  
President & CEO, Mission Accomplished

### Patrick R. Gaston

Secretary  
President & CEO, Gaston Consulting LLC

### Anthony DeNunzio

SVP, General Manager  
Leapfrog

### David G. Phillips

(until 6/7/2019)  
President, Custom Development Solutions

### Emily Simone

(as of 6/7/2019)

### Gary Levante

VP, Corporate Social Responsibility  
Berkshire Bank

### Greg Borkowski

(until 6/7/2019)  
Senior Associate Director,  
Northwestern University

### Larry McDonald

(as of 6/7/2019)  
President & COO, BRTRC Federal Solutions

### Laurie De Armond

(as of 6/7/2019)  
National Co-Leader and Greater Washington, DC,  
Practice Leader, Nonprofit & Education,  
BDO USA, LLP

### Marc Johnson

Director of Digital Strategy, StudioOnline Division of  
APCO Worldwide

### Marly Leighton

Chief of Staff, DoSomething.org

### Matthew Kaudy

(until 6/7/2019)  
Chief Marketing Officer, EECU Credit Union

### Meghan Trossen

(as of 6/7/2019)  
Director of Programs, Tysons Partnerships

### Michael J. Coburn

(until 6/7/2019)  
Executive Vice President & COO,  
Research! America

### Olivia Harris

Associate, Kilpatrick Townsend & Stockton LLP

### Randall N. Toure

(until 6/7/2019)  
Principal, Strategies 4 Tomorrow

### Scott Schenkelberg

(as of 6/7/2019)  
President & CEO, Miriam's Kitchen

### Stacy Pagos Haller

(until 6/7/2019)  
President & CEO, BrightFocus Foundation

### Tracye Funn

(as of 6/7/2019)  
Manager of Corporate Contributions,  
Washington Gas

### Walt Gillette, ACFRE

(as of 6/7/2019)  
Business Development Manager, ACD Direct, Inc.

### James E. Starr

Non-Voting Director  
America's Charities President & CEO



# 2019 Board of Directors

## Children First

### George Weiner

Chairman (as of 5/7/2019)  
Founder & CEO, Whole Whale

### Greg Borkowski

Chairman (until 5/7/2019)  
Senior Associate Director, Northwestern University

### Gary Levante

Secretary/Treasurer (as of 5/7/2019)  
VP, Corporate Social Responsibility, Berkshire Bank

### David G. Phillips

Secretary/Treasurer (until 5/7/2019)  
President, Custom Development Solutions

### Anthony DeNunzio

SVP, General Manager, Leapfrog

### Heather Lofkin Wright

(until 5/7/2019)  
US Corporate Responsibility Director,  
PricewaterhouseCoopers LLP

### James E. Starr

America's Charities President & CEO

## Community First

### Scott Schenkelberg

Chairman (as of 6/20/2019)  
President & CEO, Miriam's Kitchen

### Walt Gillette, ACFRE

Chairman (until 6/20/2019)  
Immediate Past Chairman (as of 6/20/2019)  
Business Development Manager, ACD Direct, Inc.

### Emily Simone

### Larry McDonald

President & COO, BTRC Federal Solutions

### Meghan Trossen

Director of Programs, Tysons Partnerships

### Tracye Funn

Manager of Corporate Contributions, Washington  
Gas

### James E. Starr

America's Charities President & CEO

## Health First

### Gary Levante

Chairman (as of 5/7/2019)  
VP, Corporate Social Responsibility, Berkshire Bank

### Heather Lofkin Wright

Chair (until 5/7/2019)  
US Corporate Responsibility Director,  
PricewaterhouseCoopers LLP

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President, Custom Development Solutions

### Anthony DeNunzio

SVP, General Manager, Leapfrog

### Greg Borkowski

(until 5/7/2019)  
Senior Associate Director, Northwestern University

### James E. Starr

America's Charities President & CEO



# Senior Executive Team

**James E. Starr**

President and Chief Executive Officer

**Barbara Funnell**

Administrative Director

**Denise Gustafson**

Director, Reporting and Analysis

**Lindsay J.K. Nichols**

Vice President, Marketing and Communications

**Robyn Neal**

Vice President, Client Engagement Solutions

**David Stathis**

Director, Information Technology

**Sook Suragiat, CPA**

Controller, Finance

**Kimberly H. Young**

Vice President, Business Development

**Auditors**

Independently Audited by: RSM US, LLP



## Our Mission:

America's Charities helps the nation's most trusted charities thrive by generating sustainable income through workplace giving and additional paths. We inspire employers and individuals to reach their philanthropic goals and support the charities of their choice.

