



# Membership Overview

Benefits & Other Resources to Help Your Nonprofit Succeed

April 2018



## (Y)our Membership Team



### Emily Gross

Director, Client Engagement

(703) 674-5343

[egross@charities.org](mailto:egross@charities.org)



### Jennifer Watkins

Client Engagement Coordinator

(703) 674-5375

[jwatkins@charities.org](mailto:jwatkins@charities.org)



### Brittney Campanella

Client Engagement Coordinator

(703) 674-5363

[bcampanella@charities.org](mailto:bcampanella@charities.org)



## (Y)our Membership Team, (cont'd)



**Courtney Marx**

Assistant Coordinator  
(703) 674-5347  
[cm Marx@charities.org](mailto:cm Marx@charities.org)



**Lindsay Kosa**

Campaign Representative  
(703) 674-5366  
[lkosa@charities.org](mailto:lkosa@charities.org)

### **General Contact Information:**

[ClientSolutions@charities.org](mailto:ClientSolutions@charities.org)  
(703) 674-4953



# What is America's Charities?





# America's Charities



<https://www.charities.org/about>



# Our Mission & Vision

- **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.

- **Vision**

- America's Charities is a major force in transforming and growing philanthropy.
- If we succeed in our mission, **we will raise \$1 billion for worthy causes by 2026** (we're already more than halfway there).



**What does it mean to be a member of America's Charities?**

America's Charities®  
800-438-8100  
www.americascharities.org



## Who We Serve

- **YOU** – Charities looking to expand their participation in workplace giving and employee engagement programs through membership in one of our four federations:







# What is Workplace Giving?



- **Employers & Employees** run programs in the workplace that help employees raise funds for charity, primarily through payroll deduction
  - **Public Sector Employees** (federal, state, local governments and municipalities give at work)
  - **Private Sector Employees** (employees of corporations and privately held companies give at work)
  - **Payroll deduction** = a small contribution with each paycheck for an entire year



## Helping You Help Others



- **Why workplace giving?**

- **\$4 billion/year generated** from employee engagement programs
- Nearly 71% of workplace donors say that they want to work for employers who have missions and values that align with their own personal values.
- Predictable, cost-efficient, sustainable gifts for nonprofits
- Small amounts add up – widening the pool of potential donors
- Opportunities to engage directly with donors
- Opportunities for “leveling up”

# Member Benefits

1

Campaign Applications

2

Marketing Your Nonprofit

3

Funds Allocation, Distribution and Reporting

4

Sharing Best Practices



# Campaign Applications



# CFC Program Participation



- For national and local charities
- Due each January – campaign runs in the fall of the same year
- Listed as a giving option to **entire U.S. federal workforce, including overseas military and civilian personnel**
  - 36 campaign zones
  - All 50 states, U.S. military bases, and territories overseas



# State and Local Program Participation

Together We Care



secctexas.org



- For national and local charities
- Applications due from January-early September
- Full program: **100+** state and local government employee workplace giving campaigns



## Private Sector Program Participation



- Access for our members to roughly **125 campaigns** run primarily by private sector employers
- Roughly **40** of these campaigns are managed directly by America's Charities
  - Average gift per donor is \$598
  - 5-10 times more pledge volume than non-managed
- Upkeep of your profile on both of our major giving platforms, with an option for Benevity



## Campaign Applications - Summary

- Members can participate in **260+** workplace giving campaigns with America's Charities through our 3 programs:
  - **CFC** (36 distinct campaigns)
  - **State and Local** (100+ campaigns) or **State and Local Flex** (a selection of states from our 5 top earners)
  - **Private Sector** (roughly 125 campaigns)
- **Participation in campaigns is contingent** on whether charity provides services nationally/internationally, or in one local area
- Our **Client Engagement Team** (Emily, Jennifer, Brittney, Courtney, and Lindsay) ensures your organization is listed as a giving option in all campaigns in which you are interested in participating and for which you are eligible.





# Marketing Your Nonprofit



# Marketing Resources & Benefits

Enrich your nonprofit's capacity, visibility, and workplace donor reach:

- Member Blog (free benefit included as part of membership)
  - Opportunity to promote your mission, programs, impact, volunteer needs, and/or events to nearly 270,000 CSR, workplace giving and charity-minded professionals and executives
  - Member can be featured in the blog anytime throughout the year, multiple times
  - Editorial and strategic messaging/targeting support available from America's Charities

The image displays three screenshots of the America's Charities member blog. Each screenshot shows a different article with a title, author, date, and a photograph. The first article is about celebrating achievements of people with disabilities. The second is about supporting World Wish Day with a challenge. The third is about teaching kids about economics. The bottom of the screenshots shows the America's Charities logo and navigation menu.



## Marketing Resources & Benefits, (cont'd)



**Double *the* Donation**  
matching gifts made easy



**Verified  
Volunteers**  
by Sterling Talent Solutions



**WHOLE WHALE**



**COGENCYGLOBAL®**

- **Member-only Discounts (exclusively available as part of membership)**
  - **Save between \$499- \$999 per year** on matching gift software from **Double the Donation**
  - **Receive \$450-worth of FREE online courses** on digital media including Google AdWords, Google Analytics, Social Media, and Impact Hacking through **Whole Whale**
  - **Gain eligibility for a 20% discount** on **Verified Volunteers'** volunteer vetting services – with no setup or annual fees
  - **Get up to 20% discount** on **COGENCY GLOBAL's** Charity Registration and Sales Tax Exemption Services and **up to 44% discount** on State Corporate Compliance Service fees



# Marketing Resources & Benefits, (cont'd)

- Fall Member Ad Campaign (additional cost)

- Through co-operative advertising (multiple ad packages for all budget sizes), reach CFC and private sector donors through print, mobile, TV, and digital media all at significantly discounted costs



- Client Resources

- Promotion on social media
- Promotion in print brochures
- We share the content you provide us (e.g. graphics, videos, success stories, impact/dollar buy statements) with our workplace giving clients and other State/Local/Private Sector campaigns who request it

America's Charities Retweeted

**Make-A-Wish America** @MakeAWish · Apr 9

When @WWE Superstar @JohnCena talks, you listen! Here he is with a special announcement ... are you up for the #ArmWrestleChallenge? Visit [wish.org/challenge](http://wish.org/challenge) to learn how to join the fun!

4 60 145



# Campaign Events

- Events

- Opportunities to engage directly with employee donors at charity fairs, speaking engagements, awards ceremonies and networking functions
  - Just under 14,000 unique invitations to 485 events sent last year
  - Invitations are sent as they are received. Busiest time of year for events is August-December.

- Survey

- Released in late spring/early summer
- Gauges your interest in receiving notifications by geographic region





# Marketing Summary



- Ways we help:
  - Blog
    - 13,000 average views per post
  - Promotion through Client Resource Center, social media, CSR newsletter, and on our website
    - 5,000 followers on social media
    - 30-50,000 monthly website visitors
  - Discounts
    - Save money on learning and implementing best practices
  - Additional Advertising Packages
    - Invest in advertising opportunities
  - Events Fulfillment
    - Hundreds of opportunities and invitations each year around the country



# Funds Allocation, Distribution and Reporting



# www.charities.org

- Go to [www.charities.org/user](http://www.charities.org/user) and log in using your username and password. **If you do not know your username and/or password, contact us** and we will get that for you right away.

The screenshot shows the 'User account' page on the website. At the top, there is a navigation bar with the 'America's Charities' logo and several menu items: 'Find a Charity', 'Cause Funds', 'Solutions', 'Resources', 'News & Blog', and 'About'. Below the navigation bar, the page title is 'User account'. There are three buttons: 'Create new account', 'Log in' (highlighted in blue), and 'Request new password'. The main content area contains two input fields. The first is labeled 'E-mail \*' and contains the text 'acdemo1'. Below it is the instruction 'Enter your e-mail address.'. The second is labeled 'Password \*' and contains three dots. Below it is the instruction 'Enter the password that accompanies your e-mail.'. At the bottom of the form is a 'Log in' button.





# Report Types



## Reports

Select the report you would like to run

1. [Pledge and Donor Report](#)
2. [Distribution Report](#)
3. [Member Distribution](#)
4. [Pledge Summary Report](#)
5. [Donor Acknowledgement Report](#)



## What's the difference between a campaign year and a calendar year?

- A **campaign year** indicates the year in which the funds were pledged. Ex: if a donor giving pledged through payroll deduction in 2017 to Charity A:
- Charity A would receive payments from the above mentioned donor beginning in May 2018, through February 2019.
- **Distribution Schedule:**
  - For the most part, America's Charities distributes funds on a monthly basis, as received from campaigns:
    - 2016 campaigns: Paid from May 2017 through February 2018
    - 2017 campaigns: Paid from May 2018 through February 2019
    - 2018 campaigns: Paid from May 2019 through February 2020
    - 2019 campaigns: Paid from May 2020 through February 2021



# #1. Pledge and Donor Report



[VIEW REPORTS](#)

## Pledge and Donor Report

Please enter begin and end dates

**Begin Date**   
format: mm/dd/yyyy

**End Date**   
format: mm/dd/yyyy

### DOWNLOAD:

ELECTRONIC  
FUNDS  
TRANSFER (EFT)  
AUTHORIZATION  
FORM

  
2017/18 | Member Toolkit





# #5. Donor Acknowledgement Report



[VIEW REPORTS](#)

## Donor Acknowledgement Report

Please enter begin and end dates

**Begin Date**   
format: mm/dd/yyyy

**End Date**   
format: mm/dd/yyyy

### DOWNLOAD:

ELECTRONIC  
FUNDS  
TRANSFER (EFT)  
AUTHORIZATION  
FORM

  
2017/18 | Member Toolkit





## #5. Donor Acknowledgement Report - SAMPLE

| Date Added                       | Year | Type        | Campaign Name              | Amount Pledged | Thank You | First Name | Last Name | E-Mail   | Notes            | Address        | City   |
|----------------------------------|------|-------------|----------------------------|----------------|-----------|------------|-----------|--|------------------|----------------|--------|
| 04/02/11                         | 2010 | CFC         | CFC- National Capital Area | N/A            | Yes       | Richard    | Nixon     |  |                  | 358 N Beach Ct | Orange |
| CFC- National Capital Area Total |      |             |                            | N/A            |           |            |           |  |                  |                |        |
| 12/28/10                         | 2010 | Private     | American Express           | \$250.00       | Yes       | Abigail    | Adams     | <a href="mailto:Abby@aol.com">Abby@aol.com</a>   | In honor of Mary |                |        |
| 12/28/10                         | 2010 | Private     | American Express           | \$120.00       | Yes       | Andrew     | Jackson   |  |                  |                |        |
| American Express Total           |      |             |                            | \$370.00       |           |            |           |  |                  |                |        |
| 03/18/11                         | 2010 | Private     | UnitedHealth               | \$120.00       | Yes       | Oprah      | Winfrey   | <a href="mailto:oprah@aol.com">oprah@aol.com</a> |                  |                |        |
| 03/18/11                         | 2010 | Private     | UnitedHealth               | \$240.00       | Yes       | Eddie      | Murphy    |  |                  | 908 Oak Drive  | Hudson |
| UnitedHealth Total               |      |             |                            | \$360.00       |           |            |           |  |                  |                |        |
| 05/11/11                         | 2010 | State/Local | Virginia State Campaign    | \$320.00       | Yes       | Richard    | Gere      |  |                  | PO Box 5551    | Richmo |



# #4. Pledge Summary Report



[VIEW REPORTS](#)

## Pledge Summary Report

Please enter campaign pledge year

YEAR   
format: yyyy

### DOWNLOAD:

ELECTRONIC  
FUNDS  
TRANSFER (EFT)  
AUTHORIZATION  
FORM

  
2017/18 | Member Toolkit





## #4. Pledge Summary Report - SAMPLE

| Year | Campaign Type | Campaign Name                    | Amount Pledged     | City       | State | Zip   |
|------|---------------|----------------------------------|--------------------|------------|-------|-------|
| 2010 | CFC           | Chesapeake area CFC              | \$1,569.00         | Baltimore  | MD    | 21203 |
| 2010 | CFC           | CFC of the National Capital Area | \$59,650.00        | Alexandria | VA    | 22314 |
| 2010 |               | CFC Campaigns Summary            | \$61,219.00        |            |       |       |
| 2010 | Fiscal        | Lockheed Martin                  | \$6,569.00         | Bethesda   | MD    | 20153 |
| 2010 | Fiscal        | ExxonMobil Employee Campaign     | \$9,650.00         | Fairfax    | VA    | 22032 |
|      |               | Fiscal Campaign Summary          | \$16,219.00        |            |       |       |
| 2010 | Private       | TIAA-CREF                        | \$3,049.52         | New York   | NY    | 10017 |
| 2010 | Private       | JP Morgan                        | \$2,584.00         | New York   | NY    | 10017 |
| 2010 |               | Private Campaigns Summary        | \$5,633.52         |            |       |       |
| 2010 | State&Local   | Combined Virginia Campaigns      | \$2,908.00         | Richmond   | VA    | 23219 |
| 2010 |               | State/Local Campaigns Summary    | \$2,908.00         |            |       |       |
|      |               | <b>Grand Total</b>               | <b>\$69,760.52</b> |            |       |       |



## Report #2 and #3: Distribution Reports

**These reports require a distribution ID.** Each distribution sent to your organization through America's Charities has a unique ID that you can get either from the EFT notice, check stub, or EFT email notification alerting you that funds have been disbursed. If you do not know or do not have a distribution ID, please contact us.

### **#2: Distribution Report**

For a given distribution ID, this gives information for campaigns we have donor detail on (not CFC or the majority of state and local campaigns – mostly campaigns we either manage or for which we have access to donor details).

### **#3. Member Distribution Report**

For a given distribution ID, this gives distribution information for campaigns for which we have no donor detail (CFC, state and local campaigns included).





## #2. Distribution Report - SAMPLE

| Campaign Name                  | Amount Pledged    | Current Payment | Total Paid To Date | Thank You | First Name | Last Name | Address        | City    | St. | Zip   | EMail  |
|--------------------------------|-------------------|-----------------|--------------------|-----------|------------|-----------|----------------|---------|-----|-------|--|
| AARP                           | \$650.00          | \$150.00        | \$500.00           | Yes       | Richard    | Nixon     | 358 N Beach Ct | Orange  | FL  | 32746 |  |
| <b>AARP Total</b>              | <b>\$650.00</b>   | <b>\$150.00</b> | <b>\$500.00</b>    |           |            |           |                |         |     |       |  |
| Lockheed Martin                | \$250.00          | \$125.00        | \$125.00           | Yes       | Abigail    | Adams     |                |         |     |       | <a href="mailto:abby@yaf.com">abby@yaf.com</a> |
| Lockheed Martin                | \$120.00          | \$60.00         | \$60.00            | No        | Andrew     | Jackson   |                |         |     |       |  |
| <b>Lockheed Martin Total</b>   | <b>\$370.00</b>   | <b>\$185.00</b> | <b>\$185.00</b>    |           |            |           |                |         |     |       |  |
| ExxonMobil                     | \$120.00          | \$30.00         | \$90.00            | No        | Oprah      | Winfrey   |                |         | WI  |       |  |
| ExxonMobil                     | \$240.00          | \$60.00         | \$160.00           | Yes       | Eddie      | Murphy    | 908 Oak Drive  | Hudson  | WI  | 54016 |  |
| <b>ExxonMobil Total</b>        | <b>\$360.00</b>   | <b>\$90.00</b>  | <b>\$250.00</b>    |           |            |           |                |         |     |       |  |
| Montgomery County              | \$360.00          | \$130.00        | \$280.00           | Yes       | Richard    | Gere      | PO Box 5551    | Potomac | MD  | 85702 |  |
| Montgomery County              | \$480.00          | \$90.00         | \$330.00           | Yes       | Harrison   | Ford      | 3737 E 38th St | Olney   | MD  | 85713 |  |
| <b>Montgomery County Total</b> | <b>\$840.00</b>   | <b>\$220.00</b> | <b>\$610.00</b>    |           |            |           |                |         |     |       |  |
| <b>Grand Total</b>             | <b>\$2,220.00</b> | <b>\$645.00</b> | <b>\$1,545.00</b>  |           |            |           |                |         |     |       |  |



## #3. Member Distribution Report - SAMPLE

| Year               | Campaign Type | Campaign Name                    | Amount Pledged      | Current Payment    | Total Paid to Date  | City       | State | Zip   | Notes |
|--------------------|---------------|----------------------------------|---------------------|--------------------|---------------------|------------|-------|-------|-------|
| 2009               | CFC           | Chesapeake area CFC              | \$1,569.00          | \$0.00             | \$979.30            | Anniston   | AL    | 36202 |       |
| 2009               | CFC           | CFC of Western Maryland          | \$12,533.00         | \$2,860.00         | \$8,741.12          | Birmingham | AL    | 35232 |       |
| 2009               | CFC           | St. Mary's County CFC            | \$890.00            | \$0.00             | \$520.96            | Dothan     | AL    | 36302 |       |
| 2009               | CFC           | CFC of the National Capital Area | \$59,650.00         | \$6,805.00         | \$48,059.39         | Montgomery | AL    | 36106 |       |
| 2009               |               | CFC Campaigns SUMMARY            | \$74,642.00         | \$9,665.00         | \$58,300.77         |            |       |       |       |
| 2009               | Private       | UnitedHealth Group Incorporated  | \$2,130.00          | \$146.15           | \$1,897.19          | Minnetonka | MN    | 55343 |       |
| 2009               | Private       | TIAA-CREF                        | \$3,049.52          | \$0.00             | \$645.55            | New York   | NY    | 10017 |       |
| 2009               | Private       | JP Morgan                        | \$2,584.00          | \$562.00           | \$789.00            | New York   | NY    | 10017 |       |
| 2009               |               | Private Campaigns SUMMARY        | \$7,763.52          | \$708.15           | \$3,331.74          |            |       |       |       |
| 2009               | State & Local | Combined Virginia Campaigns      | \$2,908.00          | \$268.16           | \$2,296.21          | Richmond   | VA    | 23219 |       |
| 2009               |               | State/Local Campaigns SUMMARY    | \$2,908.00          | \$268.16           | \$2,296.21          |            |       |       |       |
| <b>Grand Total</b> |               |                                  | <b>\$85,313.52</b>  | <b>\$10,641.31</b> | <b>\$63,928.72</b>  |            |       |       |       |
| <b>Fees</b>        |               |                                  | <b>(\$5,118.81)</b> | <b>(\$511.00)</b>  | <b>(\$4,088.00)</b> |            |       |       |       |
| <b>Net Payment</b> |               |                                  | <b>\$80,194.71</b>  | <b>\$10,130.31</b> | <b>\$59,840.72</b>  |            |       |       |       |



# Funds Allocation, Distribution and Reporting Summary

- **Pledge Information** is available via your member portal and/or Pledge First – same login for both
  - [www.charities.org/user](http://www.charities.org/user)
  - [www.pledgefirst.org/charitylogin/](http://www.pledgefirst.org/charitylogin/)
- **Campaign Year** – the year the campaign ran and the pledge was made by the employee; payments occur beginning the following May and wrap up February 1 ½ years after the initial pledge was made
- **Some campaigns have rules** about contacting donors. CFC donors may not receive contact at work, only at home. Some state/local campaigns have their own rules – pay attention to the information on your donor acknowledgement report – we list restrictions on the report itself
- **Reporting questions? Contact [help@charities.org](mailto:help@charities.org)**



# Sharing Best Practices



# Snapshot Research



**New Research!**

## **Snapshot 2017 Report**

What Employees Think About  
Workplace Giving, Volunteering, and CSR

**Download Your Copy Here:**

[www.charities.org/giving-trends](http://www.charities.org/giving-trends)

Download Snapshot from Previous Years:

- 2015 – *The New Corporate DNA: Where Employee Engagement and Social Impact Converge*
- 2014 – *Rising Tide of Expectations: Corporate Giving, Employee Engagement and Impact*
- 2013 – *Trends and Strategies to Engage Employees in Greater Giving*



# Keeping You Informed and Advocating on Your Behalf

- We Inform Campaign Managers
  - CFC Foundation Committee
  - Governance Committees – State and Local Campaigns
  - Partnerships and Managed Campaigns – Corporate
- We Inform You
  - Membership Assembly
  - Membership News & Updates
  - Member Newsletter
  - Webinars & Toolkits





## Best Practices Summary

- We do not just consult with nonprofits – we advise, counsel, and work on behalf of our member nonprofits based on **research-proven best practices**.
- Our 35+ years of experience and continued curiosity for the field of workplace giving makes America's Charities an **industry expert**.





Q&A



THANK YOU